

Ukraine Talks in Washington



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Ukraine Talks: 4 Key Takeaways

President Zelensky returned to Washington for high-stakes talks with US and European leaders, following Trump's meeting with Putin in Alaska. While optimism surrounds potential negotiations, concrete steps toward a ceasefire or a peace deal remain uncertain, creating a volatile backdrop for markets.

1. Putin-Zelensky Meeting Remains Possible but Uncertain

President Trump is exploring a bilateral meeting between **Putin and Zelensky**, followed by a **potential trilateral** with the US. Moscow's response remains cautious, only acknowledging the "possibility" of higher-level talks.

Markets implication: Confirmation of a face-to-face could materially shift risk sentiment, with **upside potential for energy and defense sectors**.

2. Ceasefire Prospects Remain Ambiguous

Trump downplayed the necessity of a pre-negotiation ceasefire, while European leaders, notably Germany, emphasized it as essential. Zelensky did not press the issue.

Markets implication: The lack of a near-term ceasefire increases the likelihood of continued volatility in commodities linked to Eastern Europe, including **natural gas, wheat, and oil**.

3. US Security Guarantees Highlighted

Trump signaled US support for Ukraine's security, stopping short of committing troops but pledging military protection. Zelensky confirmed a \$90bn US arms package covering aviation, anti-missile, and other advanced systems.

Markets implication: Defense stocks may see optimism, while geopolitical risk premiums in currency pairs and **commodity markets are likely to remain elevated.**

4. Zelensky's Diplomatic Approach Shifts Tone

Zelensky adopted a more **conciliatory approach**, emphasizing diplomacy and personal engagement with US and European leaders. European counterparts praised US leadership, signaling alignment on long-term security despite short-term differences.

Markets implication: Diplomatic warmth may provide **temporary stabilization** in market sentiment, though structural risk remains until tangible agreements are achieved.

Trade Ukraine Summit

- **Commodities & Energy:** Volatility in oil, gas, and wheat could create trading chances.
- **Defense Stocks:** US arms deal may boost defense sector.
- **Safe-Haven Assets:** USD and gold are likely supported by ongoing risks.

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