

November News: AI Concerns, Historic Halts, and Stock Swings

November 24th, 2025

- **Historic Halt** – The government shutdown, which began on October 1, 2025, officially ended on November 12, 2025. The 43-day shutdown was the longest ever (source: BBC).
- **Big Berkshire Bet** – Berkshire Hathaway has made a substantial investment in Alphabet, with 17.85 million shares owned as of September 30. This comes after Berkshire Hathaway trimmed its holdings in Apple and Bank of America over the past few months (source: Reuters).
- **Increasing Indexes** – The September 2025 Consumer Price Index rose by 0.3%, bringing the 12-month average to 3.0%. The increase was led by a 4.1% hike in the gasoline index and a 1.5% rise in the energy index (source: U.S. Bureau of Labor Statistics).
- **Amazon Autos** – Ford joins Hyundai with its plans to sell vehicles on Amazon. The program will focus on the Los Angeles, Seattle, and Dallas markets with a variety of certified pre-owned vehicles (source: Reuters).
- **Shrinking Shares** – Peter Thiel’s hedge fund has sold its entire stake in Nvidia, according to a recent filing. The \$100 million stake sell-off comes after concerns about an AI bubble (source: Reuters).
- **Stock Swing** – Morgan Stanley has increased its 2026 S&P 500 forecast to 7,800, predicting that U.S. stocks will outperform global equities. This is a nearly 16% increase from the S&P 500’s current level (source: Reuters).
- **Drug Developer Deals** – Johnson & Johnson announced the acquisition of Halda Therapeutics, a solid tumor and prostate cancer drug developer, for \$3.05 billion. This comes after Johnson & Johnson acquired Intra-Cellular Therapies, a neurological drug developer, in January for \$14.6 billion (source: Reuters).
- **Large Loans** – KKR has renewed its partnership with PayPal to purchase up to \$75.4 billion of buy now, pay later loans. KKR is one of PayPal’s top loan purchasers (source: Reuters).
- **NFL News** – Buffalo Bills quarterback Josh Allen set the NFL record for most touchdowns by age 30, scoring his 290th touchdown on November 16, 2025. The previous record was held by Peyton Manning with 288 (source: Yahoo Sports).
- **Declining Data** – Recent data from Pew Research shows that the number of 12th graders who want to get married someday has decreased from 80% in 1993 to 67% in 2023. Similarly, the number of respondents who want kids if they marry has declined from 64% in 1993 to 48% in 2023 (source: Pew Research Center).

Definitions and Indexes

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