




USA OUTLOOK


WEEKLY NEWSLETTER
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Photo: NY TIMES

Investors Brace for a New Hormuz Blockade Threat

President Donald Trump's plan to block ships from entering or leaving Iranian ports has increased global market uncertainty and pushed oil prices higher (above \$100 per barrel). Investors are concerned that escalating tensions in the Strait of Hormuz could disrupt energy supplies and slow the global economy.

The potential blockade could severely damage Iran's economy (costing billions monthly), but also trigger retaliation, further instability, and higher fuel prices worldwide. Markets are already reacting with falling stocks and rising bond yields.

In short, the policy is raising geopolitical risks, keeping energy prices elevated, and adding pressure on the global economic outlook.

Source:
<https://www.nytimes.com/2026/04/13/business/dealbook/trump-iran-hormuz-blockade.html>

Trump Administration Returns to Court for Yet Another Tariff Lawsuit

The administration of Donald Trump is back in court defending a new 10% tariff on most imports after the Supreme Court of the United States previously struck down earlier tariffs.

States and small businesses argue the president is overstepping his authority by using an old trade law in a way Congress never intended. The administration claims it is acting within its legal powers.

The outcome could determine how far presidential tariff authority extends and whether the government must repay billions already collected. Meanwhile, the tariffs are adding pressure to consumers and businesses and increasing economic uncertainty.



Photo: NYTIMES

Source:
<https://www.nytimes.com/2026/04/10/business/trump-tariffs-lawsuit-hearing.html>



Photo: NY TIMES

Supreme Court Sides With Oil Companies in Louisiana Coastal Lawsuits

The Supreme Court of the United States ruled in favor of major oil companies like Chevron and ExxonMobil, allowing them to move environmental lawsuits over coastal damage in Louisiana from state courts to federal courts.

This is a significant win for the companies, as federal courts are generally seen as more favorable to them. The lawsuits—filed by Louisiana parishes—seek billions in damages for coastal erosion linked to decades of oil and gas activity.

The ruling does not decide whether the companies are responsible for the damage, only where the cases will be heard, but it could make it harder for plaintiffs to hold them accountable.

Source:
<https://www.nytimes.com/2026/04/17/us/politics/supreme-court-oil-louisiana.html>

What the U.S. Blockade Means for Iran's Economy

The U.S. blockade aims to weaken Iran by cutting off its key oil exports, a major source of government revenue. While this will likely worsen inflation, reduce income, and strain the economy, analysts doubt it will force Iran to change its behavior.

Iran has adapted to sanctions through non-oil trade, domestic production, and alternative routes like land transport and smuggling, allowing it to survive economically.

At the same time, the blockade could tighten global oil supply, keep prices high, and increase regional tensions, meaning it may hurt both Iran and the broader energy market without delivering a quick resolution.

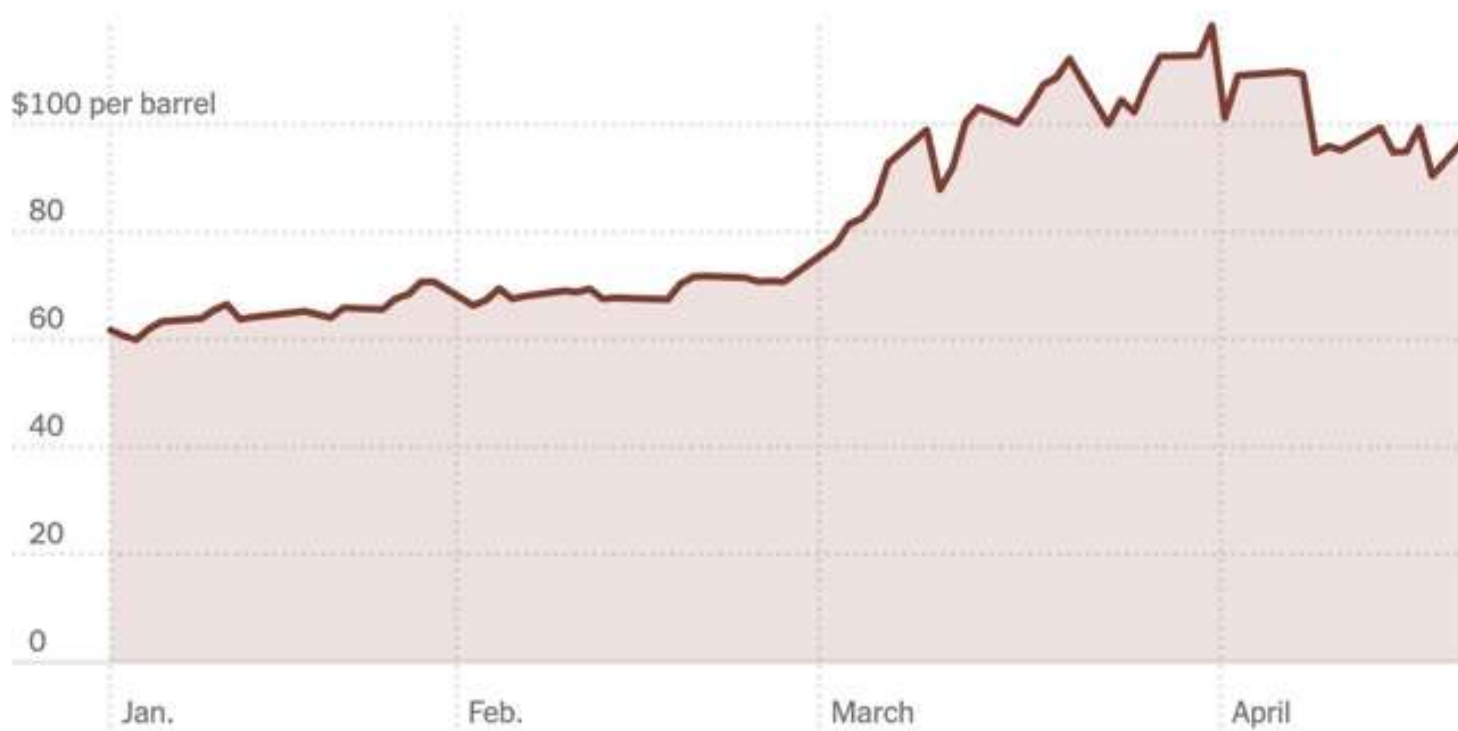


Photo: NYTIMES

Source:
<https://www.nytimes.com/2026/04/16/business/economy/iran-oil-blockade.html>

Price of Brent crude oil

How much the international benchmark costs



Notes: Data shows future contract prices for Brent crude oil. Gaps indicate nontrading hours. Data is delayed at least 15 minutes. Source: FactSet. The New York Times

Photo: NYTIMES

Oil Prices Fall Sharply After Iran Says Strait of Hormuz Is Open

Oil prices dropped sharply (about 9% to around \$90 per barrel) after Iran announced that the Strait of Hormuz had reopened to shipping, easing immediate fears of global fuel shortages. This key route allows oil from the Persian Gulf to reach global markets, so its reopening is expected to lower fuel prices for consumers in the coming weeks.

However, the situation remains uncertain. Analysts warn that oil production and supply may not fully recover quickly, as companies are hesitant to restart operations without confidence in a lasting cease-fire. There is also ambiguity about how long the strait will remain open, and U.S. restrictions on ships linked to Iranian ports continue to limit exports.

In short, while the reopening brings short-term relief and falling prices, longer-term stability in oil markets is still unclear, and prices are unlikely to return to prewar levels anytime soon.

Source:

<https://www.nytimes.com/2026/04/17/business/energy-environment/oil-prices-iran-hormuz.html>