

THIS INFINITE GAME



Falling Behind

By Mike Gyulai

September 26, 2026



Western culture promotes a belief: busyness equals productivity, motion signals progress, and idle hands confess a lack of ambition.

There is much to admire here. It is the American entrepreneurial spirit. It built the companies and conveniences we take for granted. Silicon Valley. A man on the moon. One day: Mars.

But the belief has a shadow: that if you're not constantly in motion, you are falling behind.

That shadow has cut down more risk takers than I can count. Not because they *were* behind. Because markets demand waiting, and the waiting fed the belief.

Consider a batter waiting on a pitch. His body is loaded, weight balanced on the back foot.

His attention is total.

He is tracking the pitcher's grip, the windup, the release point. Every muscle coiled, ready to fire the instant the ball leaves the hand.

He is waiting. Yet he is anything but passive.

Waiting in sport and waiting in trading share the same posture: *readiness*.

When I wait for a setup, I am actively receiving: tracking patterns, sifting noise, trusting signal when it arrives.

Frustration comes when I mistake my mind's pressure to act for a genuine signal to respond. When that pressure to feel in motion leads me to put on the trade.

Consistency lives in the space between what the mind demands and what the market offers.

The feeling of falling behind is an illusion. The discomfort it spawns is real. A trade placed to relieve that discomfort swings at nothing the market offered.

The pitch will come. My only job is to be here when it does.

Markets in Motion

The Nasdaq thrust out of the 3.5-month head-and-shoulders continuation featured in last week's issue. Price is now hovering above the neckline. The 1x measured move target sits at 33,213.75.



E-mini Nasdaq-100 Futures (Dec 2026) (NQZ2026), 1D

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November RBOB gasoline on Thursday reached the 1x measured move target of its 3-month cup-and-handle. Weakness on Friday offers the possibility of a pullback ahead.

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RBOB Gasoline Futures (Nov 2026) · 1D · NYMEX O3.3250 H3.3250 L3.1673 C3.1968 -0.1218 (-3.67%)



RBOB Gasoline Futures (Nov 2026) (RBX2026), 1D

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Oat futures continue to fly, albeit with increasing volatility in the form of long lower shadows during both Monday's and Friday's sessions.

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Oat Futures (Dec 2026) · 1D · CBOT O423'6 H425'0 L406'2 C420'2 -2'2 (-0.53%)



Oat Futures (Dec 2026) (ZOZ2026), 1D

Corn futures have formed a 4-week bull flag after impulsing halfway to the 1x measured move target of their 2-year symmetrical triangle.



Corn Futures (ZC1!), 1W

Soybean futures have formed a daily flag similar to corn’s weekly one after breaking out from a 5.5-month head-and-shoulders continuation on the continuous chart. The 1x measured move target sits at 1393.



Soybean Futures (ZS1!), 1D

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Rough rice futures continue to put in one of the strongest trends of the year, extending their run out of the 1-month ascending triangle featured in the “Commodity Supercycle” section of the [August 22, 2026, issue](#).

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Rough Rice Futures (Nov 2026) · 1D · CBOT O16.550 H16.620 L16.405 C16.620 +0.070 (+0.42%)



Rough Rice Futures (Nov 2026) (ZRX2026), 1D

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Zooming out on the continuous chart, the trend traces back to the May 4 breakout from the 2.5-month ascending triangle bottom highlighted in the [May 2, 2026, issue](#).



Rice Futures (ZR1!), 1D

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Last week, we pointed out that while selling in soybean meal futures had left a long upper shadow on the weekly chart, price closed above the upper boundary of the 10-month ascending channel, offering the possibility of a resistance-turned-support retest. Support held this week and price “filled the wick.”



Soybean Meal Futures (ZM1!), 1W

Natural gas futures completed a 2-month head-and-shoulders bottom on Thursday.
Natural gas is in a seasonally strong period through the end of October.



Natural Gas Futures (NG1!), 1D

A pattern still developing: the October feeder cattle contract has formed a 2.5-month head-and-shoulders on the daily timeframe.



Feeder Cattle Futures (Oct 2026) (GFV2026), 1D

The Pauses That Refresh

The dispersion in individual equities persists. Here are the setups that caught my eye this week:



AerCap Holdings N.V. (AER), 1D

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Cognex Corporation (CGNX), 1D

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Coinbase Global (COIN), 1D

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Commvault Systems (CVLT), 1D

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Enterprise Products Partners L.P. (EPD), 1D

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Equinix (EQIX), 1D

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Federal Signal Corporation (FSS), 1D

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GE Vernova (GEV), 1D



Kyndryl Holdings (KD), 1D

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Mattel (MAT), 1D

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Mineralys Therapeutics (MLYS), 1D

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Ingevity Corporation (NGVT), 1D

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Open Text Corporation (OTEX), 1D

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Vaxcyte (PCVX), 1D

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Boston Beer Company (SAM), 1D

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SoFi Technologies (SOFI), 1D

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Ulta Beauty (ULTA), 1D

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Vista Energy (VIST), 1D

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WESCO International (WCC), 1D

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Xometry (XMTR), 1D

Best wishes in your trading, and see you in the next issue.

— Mike Gyulai