Christian Briggs Discusses Oil, Inflation and the Interest-Rate Outlook Following Federal Reserve Increase

SAN JUAN, PUERTO RICO, September 22, 2026 /EINPresswire.com/ -- New “On The Record” episode examines Treasury yields, mortgage rates, geopolitical pressures and expanding investment in artificial intelligence infrastructure

Economist and financial commentator Christian Briggs examines the Federal Reserve’s latest interest-rate increase and the economic forces that could influence its next policy decision in a new episode of On The Record with Christian Briggs.

Titled “The Fed’s Next Move: Christian Briggs Says Oil Could Trigger a Major Rate Reversal,” the episode considers how energy prices, inflation expectations, geopolitical developments and artificial intelligence investment may shape the direction of interest rates.

The Federal Reserve recently increased its benchmark rate by 25 basis points, responding to inflation that remains above its long-term target. Although policymakers have indicated that additional tightening may be necessary, Briggs argues that changing conditions in oil and bond markets could eventually alter that path.

Rather than viewing the latest increase as definitive evidence of a prolonged tightening cycle, Briggs presents a conditional outlook in which easing geopolitical pressures and lower energy prices could improve inflation expectations and place downward pressure on longer-term interest rates.

Watch or listen to the complete episode:
https://youtu.be/Cco8a2l7Zcw

Why Oil Prices Could Influence the Fed’s Next Move

Energy costs affect transportation, manufacturing, agriculture and numerous other areas of the economy. As oil and fuel prices rise, those increased costs can move through supply chains and contribute to higher consumer prices.

In the episode, Briggs examines how geopolitical conflict and uncertainty surrounding global energy supplies have contributed to the Federal Reserve’s inflation concerns.

He argues that the direction of oil prices may become an important factor in the central bank's next decision. If geopolitical conditions stabilize and oil moves toward a range of approximately $85 to $90 per barrel, Briggs believes inflation expectations could begin to improve.

That change would not guarantee an immediate reduction in the federal funds rate. However, Briggs says it could create conditions that eventually allow policymakers to pause or reverse course.

The episode emphasizes that this is a conditional economic scenario dependent on inflation data, energy markets, geopolitical developments and broader financial conditions.

The Bond Market May Matter More Than the Fed

Briggs also explains why the Federal Reserve does not directly determine every interest rate affecting consumers and businesses.

While the central bank establishes a target range for short-term rates, longer-term borrowing costs are influenced heavily by the bond market. Treasury yields—particularly the yield on the 10-year Treasury note—play an important role in pricing mortgages, commercial loans and other forms of credit.

With the 10-year Treasury yield near 5%, Briggs examines whether bond investors remain concerned about inflation, federal borrowing and the long-term supply of government debt.

Even if the Federal Reserve eventually lowers its benchmark rate, mortgage rates may not decline significantly unless longer-term Treasury yields also move lower.

Briggs argues that improved inflation expectations could help reduce those yields, potentially lowering mortgage costs and supporting renewed activity in the housing market. He cautions, however, that the outcome would depend on whether bond investors believe inflation is moving sustainably toward the Federal Reserve's 2% target.

Artificial Intelligence Investment Complicates the Inflation Outlook

The episode also examines the rapidly expanding construction of artificial intelligence and data-center infrastructure.

Technology companies and their partners are directing substantial capital toward new data centers, electrical generation, power-grid upgrades, cooling systems, semiconductor production and related construction.

Briggs says this investment could provide meaningful support for economic growth while

generating demand for energy, land, raw materials, equipment and skilled labor.

That creates a complicated environment for the Federal Reserve. AI-related investment may increase productivity over time, but the near-term construction boom could also contribute to demand-driven inflation.

The episode considers whether trillions of dollars in anticipated infrastructure spending could keep portions of the economy growing even as higher interest rates place pressure on housing, small businesses and other rate-sensitive sectors.

According to Briggs, policymakers will need to distinguish between inflation caused by temporary energy disruptions and inflation arising from sustained domestic investment and demand.

Implications for Housing and Consumer Borrowing

Mortgage rates remain one of the most visible consequences of elevated Treasury yields and restrictive monetary policy.

Briggs examines whether a decline in oil prices and inflation expectations could eventually pull long-term yields lower, reduce mortgage rates and encourage buyers and sellers to return to the housing market.

Lower borrowing costs could improve affordability and create refinancing opportunities for some homeowners. They could also support construction, real estate transactions and other industries connected to housing.

However, the episode does not present a rate decline as certain. Briggs notes that persistent inflation, additional Federal Reserve increases or continued pressure in the Treasury market could keep borrowing costs elevated.

The discussion is intended to help listeners understand the variables that may influence rates rather than provide a specific prediction about the timing of future policy changes.

Skilled Trades and America’s Technology Buildout

Beyond monetary policy, Briggs considers how the AI infrastructure expansion could affect the labor market.

Building and operating data centers requires electricians, welders, construction workers, HVAC technicians, equipment operators and other skilled professionals. Expansion of electrical generation and transmission infrastructure may further increase demand for vocational and technical workers.

Briggs believes these occupations could become increasingly important as the United States develops the physical infrastructure required to support artificial intelligence and other advanced technologies.

The episode presents vocational education and skilled-trade training as important components of America's economic and technological strategy.

Continued Growth for "On The Record"

The new episode follows a period of continued audience growth for On The Record with Christian Briggs.

According to Listen Notes, the program ranks among the top 10% of podcasts worldwide based on its Listen Score. The show is available through Apple Podcasts, Spotify, YouTube and other major platforms.

Recent episodes have examined monetary policy, government debt, digital assets, financial privacy, artificial intelligence and the changing relationship between public institutions and the financial system.

Watch or Listen to the Full Episode

"The Fed's Next Move: Christian Briggs Says Oil Could Trigger a Major Rate Reversal" is available now.
https://youtu.be/Cco8a2l7Zcw

About On The Record with Christian Briggs

On The Record with Christian Briggs examines economics, monetary policy, government debt, global finance, emerging technology and the forces reshaping the financial lives of individuals and businesses.
Hosted by economist and financial commentator Christian Briggs, the program provides in-depth analysis of the policies, markets and institutional decisions affecting personal wealth, access to credit and the broader economy.

According to Listen Notes, On The Record with Christian Briggs ranks among the top 10% of podcasts worldwide based on its Listen Score.

On the Record with Christian Briggs
On the Record with Christian Briggs brings together thought leaders and economists to examine financial issues shaping our era. Each episode provides insights on economic trends and the importance of tangible assets for wealth preservation.

About Christian Briggs
Christian Briggs is a financial commentator, economist, and hard asset specialist who has advised members of Congress and the U.S. Senate on issues involving monetary policy, central bank digital currencies (CBDCs), hard assets, and global financial systems. As CEO of Hard Asset Management and a veteran of financial markets since 1987, Briggs brings decades of experience analyzing the intersection of economics, geopolitics, emerging financial technologies, and wealth preservation strategies.

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