

MARKETS | BARRON'S TAKE

The Stock Market Is Stuck Between Good Earnings and Bad Data. How the Tension Gets Resolved.

By [Martin Baccardax](#) [Follow](#)

Updated Aug 05, 2025 12:19 pm EDT / Original Aug 05, 2025 10:36 am EDT

...

Investors are struggling with a contradiction at the heart of the market as stocks move into their toughest months of the year. On the one hand, earnings have been strong. On the other, economic data are showing signs of weakness. How the two variables play out could determine whether the [stock market](#) can keep rallying to new highs—or stumbles into an end-of-summer selloff.