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BOEING (BA) STOCK AFTER HOURS ON DECEMBER 10, 2025: DHS 737 DEAL, AIRBUS ORDER RACE, AND FED CUT – WHAT TO KNOW BEFORE THE DECEMBER 11 OPEN

BY SHAN AHMED KHAN · 11 DECEMBER 2025

STOCK MARKET TODAY

Boeing stock ended Wednesday's session under modest pressure as investors weighed a politically charged new 737 order from the U.S. government, fresh delivery

**Wheat Extends Weakness Into
Wednesday as Global Supplies
Loom**

December 17, 2025, 10:58

Wheat extended losses in

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It's not nuclear, solar or wind - though it's 100% clean, and virtually limitless.

cents lower and MPLS spring wheat slid 2-3¾ cents. The backdrop remains dominated by large world supplies among major exporters. The forecast calls for a dry pattern in much of the Southern Plains next week, with NOAA's 7-day QPF showing up to an inch in SRW country. EU soft-wheat exports reached 10.5 MMT since July 1 to Dec 14, lagging last year by 0.3 MMT, and a South Korean importer purchased 20,800 MT of US-origin wheat overnight. No positions were reported by the author.



Heading into the U.S. stock market open on **Thursday, December 11, 2025**, Boeing (ticker: BA) sits at the intersection of three big narratives:

1. Order momentum and deliveries,
2. Government and defense-linked contracts, and
3. Macro tailwinds from lower interest rates.

Here's a detailed breakdown of what happened after the bell on December 10 and what traders and investors should be watching before the opening bell on December 11.

How Boeing Stock Traded on December 10, 2025

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On Wednesday, December 10, 2025, Boeing shares closed at \$198.72, down about 0.8% on the day. The stock opened at \$200.37, traded as high as \$201.35 and as low as \$198.35, with volume just under 15 million shares, above recent averages. [\[1\]](#)

In after-hours trading, Boeing slipped slightly further, changing hands around the low-\$198 area according to late-evening quote data, indicating that the news flow was enough to nudge sentiment lower but not to trigger a sharp selloff. [\[2\]](#)

Zooming out:

- The stock is still well above its late-November levels after a double-digit surge on December 2, when Boeing's CFO guided to positive free cash flow in 2026, powered by higher 737 and 787 deliveries. [\[3\]](#)
- Year-to-date, Boeing is up roughly low double digits, lagging Airbus but finally showing signs of a sustained turnaround in orders and investor confidence. [\[4\]](#)

In other words: December 10 looked less like a trend reversal and more like a consolidation day after a powerful rally.

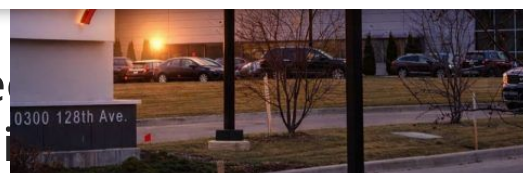


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1. DHS Buys Six Boeing 737s for Deportation Flights

The most headline-grabbing development was news that the U.S. Department of Homeland Security (DHS) will purchase **six Boeing 737 aircraft**, in a deal worth **nearly \$140 million**, to build its own fleet for immigration deportation operations. [\[5\]](#)

Key points:

- DHS aims to operate a dedicated 737 fleet for **Immigration and Customs Enforcement (ICE)** deportation flights instead of relying solely on charter operators. [\[6\]](#)
- The aircraft are being procured through a contractor (Daedalus Aviation), but the jets themselves are Boeing 737s, adding incremental demand for the program. [\[7\]](#)
- Multiple outlets framed the story as part of the Trump administration's broader push to **expand deportations**, a policy context that brings



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Slips With Big New Order for Deportation 737s”, noting that the stock weakened intraday as investors digested the optics of being tied directly to a controversial policy area. [\[9\]](#)

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For the stock:

- **Economically**, \$140 million is small versus Boeing’s ~\$150 billion market cap, but it reinforces demand for 737s from government customers. [\[10\]](#)
- **Reputationally**, the deal may become a talking point for ESG-focused investors and could feature in political debates, especially if deportation policies intensify. [\[11\]](#)

This mix of incremental revenue and non-trivial controversy helps explain why the contract didn’t ignite a rally in BA shares.

2. November Deliveries: Down 17%, But Orders Still Roaring

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Boeing released its **November 2025 orders and deliveries** earlier in the week, and those numbers continued to shape sentiment on December 10.

According to Reuters and aviation analysts: [\[12\]](#)

- Boeing delivered **44 jets** in November, down from **53 in October** – a **17% month-over-month decline**.
- Deliveries included:
 - **32 Boeing 737 MAX jets,**
 - **6 Boeing 787 Dreamliners,**
 - **plus 777 freighters and 767s for cargo and military customers.** [\[13\]](#)
- Boeing **trailed Airbus**, which shipped **72 jets** in November, reinforcing that Airbus still leads on deliveries even as Boeing regains order momentum. [\[14\]](#)

On the **orders** side, the story was much better:

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- Boeing booked **164 gross orders** in November and, after **38 cancellations**, ended with **126 net new orders**. [\[15\]](#)
- The month was boosted by **74 orders for the long-delayed 777X**, including a large follow-on from Emirates and additional jets for China Airlines. [\[16\]](#)
- Through November 30, Boeing had logged **about 1,000 gross orders and 908 net orders for 2025**, with a backlog above **6,000 aircraft**. [\[17\]](#)

Specialist aviation outlet AirInsight described November as “another good month” for Boeing’s order book while warning that deliveries will naturally slow as **older 737 MAX inventory is worked down and production paces deliveries**, a theme also echoed by Boeing’s management. [\[18\]](#)

For investors, this creates a textbook tension:

- Orders and backlog are **clearly improving**, but
- Short-term **delivery softness** and production constraints remain a drag on near-term cash flow.

3. Airbus CEO: Boeing Is Likely to Win the 2025 Order Race

On December 10, Airbus CEO Guillaume Faury publicly acknowledged that Boeing is **likely to win the 2025 aircraft order race** for the first time in six years. [\[19\]](#)

According to Reuters and follow-up coverage:

- By the end of November, Boeing had about **908 net orders**, compared with around **700 for Airbus**. [\[20\]](#)
- Faury cited **trade-related factors**, noting that U.S. tariff settlements and diplomatic considerations helped Boeing secure more long-haul orders from some airlines in Asia and the Middle East. [\[21\]](#)
- Airbus still **leads in deliveries and total backlog**, meaning it remains the world's largest aircraft manufacturer, but the psychological shift—Boeing finally out-ordering Airbus—matters for investor sentiment. [\[22\]](#)

generation since the 737 MAX crisis. [\[23\]](#)

This “orders win, deliveries lag” dynamic is central to how investors are now valuing Boeing versus its European rival.

4. UBS Reaffirms Buy Rating and \$275 Target

Adding to the day’s narrative, a UBS analyst note on December 10 reiterated a “Buy” rating on Boeing with a **\$275 price target**, implying roughly **35–40% upside** from the stock’s current level around \$200. [\[24\]](#)

UBS’s view, as summarized by Investing.com: [\[25\]](#)

- The bank highlighted **44 recent aircraft deliveries**, including **32 737 MAX** and **6 787 jets**, and estimated that a portion came from stored inventory rather than fresh production.

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- The note also referenced Boeing's completion of its acquisition of **Spirit AeroSystems**, a key supplier of fuselages and other major structures, arguing that tighter control over the supply chain should support production stability over time. [\[26\]](#)

However, the same analysis flagged persistent **financial fragility**:

- 
- Boeing's revenue has grown roughly **10% over the last 12 months**, but the company remains **unprofitable** and scores poorly on some balance-sheet health metrics, according to InvestingPro's quantitative models. [\[27\]](#)

So the bullish thesis is very much “**execution and time will fix this**”, not “everything is already perfect.”

5. Innovation Update: Boeing and United Test Next-Gen Digital Communications



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and United Airlines completed **flight tests** of a modernized **Internet Protocol Suite (IPS)–based data communication system** using a United 737-8 serving as Boeing’s 2025 **ecoDemonstrator Explorer**. [\[28\]](#)

Highlights:

- The tests aim to improve **information flow between pilots, air traffic control, and airline operations centers**, with the goal of **reducing delays, fuel burn, costs, and emissions**. [\[29\]](#)
- The project involved a wide cast: **Collins Aerospace, Honeywell, Thales, SITA, Viasat, NASA, the FAA, and the European Space Agency**, among others. [\[30\]](#)

While this doesn’t move near-term earnings, investors often look for signs that Boeing is not just repairing old problems but **building future capabilities** in digital aviation and sustainability. In the background of deliveries and cash-flow debates, programs like ecoDemonstrator help support the “long-term moat” argument for the stock.

6. Heavy Options Activity Signals Short-Term Speculation

Options data on December 10 showed that traders were very active in Boeing:

- A Nasdaq report highlighted that BA saw volume of about **55,000 option contracts**, or roughly 5.5

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contracts traded, suggesting short-term bets on a modest rebound above the \$200–205 zone. [\[32\]](#)

This elevated options activity tends to **magnify short-term moves**: if the stock pushes decisively above \$200–205, call buyers can add fuel to the upside; if it fails, gamma hedging can accelerate downside pressure.

7. Institutional and Insider Activity

A MarketBeat analysis of recent filings added more nuance to Boeing's ownership picture: [\[33\]](#)

- **Jump Financial LLC** cut its Boeing position by **86.4%** in Q2, selling about **147,700 shares** and retaining just over **23,000 shares**, worth roughly \$4.9 million.
- Other small institutions and wealth managers modestly **increased** positions, indicating a mixed but generally engaged institutional shareholder base.
- Insider transactions were also mixed:
 - **EVP Uma M. Amuluru** sold **1,366 shares** at around **\$197.66**, trimming her stake.
 - **SVP Dana S. Deasy** bought **554 shares** at roughly **\$178.88**, modestly increasing his holdings.

The article also reminded readers that Boeing's latest reported quarter showed: [\[34\]](#)

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- And analyst expectations for **full-year 2025 EPS** around **-\$2.6**, still a loss but a big improvement from prior years.

Where Analysts See Boeing Stock Going

Across major data providers, the **12-month Wall Street consensus** on Boeing remains **constructive but not unanimous**:

- **MarketBeat**: average price target around **\$233–234**, implying roughly **16–17% upside** from the **~\$200** level, with a consensus rating of **“Moderate Buy”** (3 Strong Buy, 15 Buy, 4 Hold, 5 Sell across 27 analysts). [\[35\]](#)
- **TipRanks**: average target about **\$248**, implying **~20% upside**, also with a bullish skew in ratings. [\[36\]](#)
- **StockAnalysis.com**: consensus around **\$240**, with a target range from roughly **\$140 on the low end** to **above \$280 on the high end**, highlighting wide disagreement about the pace of the turnaround. [\[37\]](#)

Put simply:

- **Bulls** are focused on:
 - The **massive order backlog** (over 6,000 jets),

- A supportive macro backdrop with lower interest rates. [\[38\]](#)
- Bears and skeptics keep pointing to:
 - Big recent losses and execution missteps,
 - A heavy debt load,
 - Ongoing regulatory and quality-control risks, and
 - The possibility that macro weakness, political turbulence, or new safety incidents could derail the recovery.

Macro Backdrop: Fed Rate Cut Helps, But Uncertainty Lingers

December 10 wasn't just about Boeing—the Federal Reserve stole the macro spotlight.

The Fed cut its benchmark interest rate by 25 basis points, to a range of 3.50–3.75%, its third cut in 2025, citing a weakening labor market and a desire to cushion the economy. [\[39\]](#)

Markets reacted positively:

- The Dow Jones Industrial Average closed up about 1.05%,
- The S&P 500 gained around 0.7%,

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company manage its balance sheet. [\[41\]](#)

- Airlines and leasing companies may find it easier to finance large aircraft purchases.
- A more resilient macro backdrop reduces the risk of cancellations and deferrals.

However, the Fed also signaled that **future cuts may be limited**, and policymakers remain divided about the 2026 outlook. [\[42\]](#)

So the macro environment is helpful but not a free lunch—investors still need Boeing to deliver on its own promises.

Key Things to Watch Before the Market Opens on December 11, 2025

As traders prepare for Thursday's session, here are the main Boeing-specific checkpoints:

1. Narrative Around the DHS 737 Deal

Expect continued coverage and commentary around DHS's decision to build a deportation fleet of Boeing 737s:

- Watch for **political reactions**, activist statements, or calls for boycotts that could affect Boeing's brand perception. [\[43\]](#)

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If this story escalates in the news cycle, it could add **headline risk**, even if the dollar value is modest.

2. Reaction to the Order Race Headlines

Media and social chatter around “**Boeing beats Airbus on orders**” could continue into the pre-market and early session:

- Positive framing (Boeing is “back”) supports the **long-term turnaround narrative**. [\[44\]](#)
- Skeptical framing (orders $\neq$ cash, Airbus still leads deliveries) reminds the market that the **real test is execution and deliveries**.

How the market digests this dichotomy may influence whether BA can hold the psychologically important \$200 level.

3. Fed Follow-Through: Futures and Cyclical Sentiment

Ahead of the open, equity futures will reflect overnight digestion of the Fed’s decision and press conference:

- If futures remain **firm**, industrial and aerospace names could see follow-through buying, giving Boeing a tailwind. [\[45\]](#)
- If traders shift quickly to worrying about 2026 **growth** or Fed infighting, cyclicals could wobble,

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4. Technical Levels and Options Positioning

Given the heavy options volume and concentration in near-term \$205 calls, technical levels deserve extra attention: [\[46\]](#)

- **Immediate support:** around \$195–198, the low end of Wednesday’s range and recent congestion zone.
 - **Key psychological level:** \$200. Price action around this line often drives short-term sentiment headlines.
 - **Near resistance:** \$205, where large call open interest can act as a magnet or a ceiling depending on flows.
- 

If pre-market indications show BA trading meaningfully above or below these levels, expect **amplified volatility** as options market makers adjust hedges.

5. Any New Updates on 737 MAX, 737-10, 777X, or Quality Issues

Recent months have featured:

- Ongoing scrutiny of 737 MAX quality and production,
- Slow progress toward 777X certification, 



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overshadow all of the macro and order-book positives. This is the “one-headline risk” that continues to hang over Boeing.

What It All Means for Boeing Investors

By the time markets open on December 11, 2025, Boeing will be balancing:

- A solid demand story:
 - Likely winning the 2025 global order race,
 - A backlog of more than 6,000 aircraft,
 - A CFO roadmap to positive free cash flow in 2026. [\[48\]](#)
- Against persistent execution and financial risks:
 - Recent multi-billion-dollar charges and negative EPS,
 - Dependence on flawless execution of complex production ramp-ups,
 - Reputational and political risks, now including the DHS deportation fleet. [\[49\]](#)
- Within a macro landscape that has just turned a little more supportive thanks to another Fed rate cut, but still features uncertainty about growth, trade, and politics. [\[50\]](#)

reliability of Boeing's recovery. ^[51]

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