

DAILY ANALYSIS

12 AUGUST 2025



Economic Calendar

Time	Cur.	Event	Forecast	Previous
12:30	USD	Core CPI (MoM) (Jul)	0.3%	0.2%
12:30	USD	CPI (MoM) (Jul)	0.2%	0.3%
12:30	USD	CPI (YoY) (Jul)	2.8%	2.7%

Geopolitical Shifts and Fed Outlook Steer Markets

Global financial markets have experienced mixed movements amid shifting geopolitical events and fresh economic data. The US 100 Tech Index closed at 23,560 on August 12, down 0.36% from the prior session and 3.08% over the past month, though still up nearly 24% year-on-year. Precious metals fluctuated as inflation expectations and Federal Reserve policy signals evolved, with gold holding near \$3,375 per ounce, supported by growing Fed rate cut expectations and ongoing trade tensions.

In currency markets, the Japanese yen weakened to around 147.7 per dollar on mixed Bank of Japan signals, while the British pound rose to \$1.34 after the Bank of England's rate cut. The offshore yuan stayed firm near 7.18 per dollar, helped by upbeat services data and central bank guidance.

Geopolitical developments also shaped sentiment. News of a planned meeting between U.S. President Donald Trump and Russian President Vladimir Putin lifted hopes for progress on the Ukraine conflict, easing risk sentiment and influencing commodity prices. Traders now await key U.S. inflation data and U.S.-China tariff negotiations, both pivotal for central bank policy outlooks and market trends. Easing in trade tensions continued with Trump announcing a 90-day extension to the U.S.-China trade deal deadline.

Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YoY
CURRENCIES					
EURUSD	1.16201	0.03%	0.36%	-0.38%	12.18%
GBPUSD	1.34291	-0.03%	0.99%	0.01%	7.27%
AUDUSD	0.64994	-0.21%	0.43%	-0.67%	5.01%
NZDUSD	0.59291	-0.16%	0.36%	-0.70%	6.01%
USDJPY	148.282	0.10%	0.51%	0.34%	-5.76%
USDCAD	1.37765	0.01%	0.04%	0.51%	-4.18%
METALS					
XAUUSD	3353.22	0.31%	-0.83%	0.31%	27.77%
SILVER	37.877	0.68%	0.15%	-0.64%	31.16%
PLATIN	1328	-0.25%	0.92%	-5.15%	48.55%
INDICES					
S&P 500	6377.43	0.06%	1.24%	1.74%	8.43%
DOW JONES	44028	0.12%	-0.19%	-0.97%	3.49%
NASDAQ	23551	0.10%	2.31%	3.04%	12.08%
NIKKEI	42788	2.31%	5.52%	8.43%	7.25%
DAX	24155	0.30%	1.29%	-0.02%	21.32%
ENERGY					
CRUDE OIL	64.198	0.37%	-1.48%	-4.15%	-10.49%
BRENT OIL	66.934	0.46%	-1.04%	-3.29%	-10.32%
NATURAL GAS	2.9626	0.29%	-1.57%	-14.52%	-18.45%
BONDS					
US 10Y	4.28	0.90%	0.06%	-0.16%	-0.30%
DE 10Y	2.6966	0.92%	0.07%	-0.04%	0.33%
JAPAN 10Y	1.499	0.60%	0.02%	-0.08%	0.41%
UK 10Y	4.568	3.60%	0.06%	-0.04%	0.00%
CHINA 10Y	1.73	2.30%	0.02%	0.06%	0.05%

EURUSD



The euro traded near \$1.16 in mid-August, slightly below last month's 2021 highs, as markets weighed economic, political, and monetary factors. Attention is on Friday's planned meeting between U.S. President Trump and Russian President Putin, aimed at addressing the Ukraine crisis, with Ukrainian President Zelenskyy not expected to attend. In the U.S., weak payroll figures and a falling ISM Services PMI have

increased the probability of near-term Federal Reserve rate cuts. Investors now await today's U.S. CPI release for further guidance on the Fed's policy outlook.

EUR/USD is currently testing resistance at 1.1725, with key support at 1.1550.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1830	1.1795	1.1725	1.1550	1.1500	1.1350

XAUUSD



On Monday, gold prices fell to around \$3,350 per ounce after President Donald Trump announced an exemption for gold from tariffs, easing concerns over higher import costs. A prior U.S. Customs ruling had applied a 39% tariff on 1-kilogram and 100-ounce gold bars from Switzerland, with potential extension to other countries under existing U.S. policies. Trump also extended the 90-day trade deal deadline with China, adding to signs of easing global

tensions ahead of his planned meeting with Russian President Putin on August 15.

Gold is currently facing resistance around \$3,400, with strong support near \$3,320.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
3500	3460	3400	3320	3275	3250

BTCUSD



On Tuesday, August 12, Bitcoin traded at \$118,904, up 165 points or 0.14% from the previous session. Over the past four weeks, it has gained 0.19%, while rising 96.69% over the last year. Trading Economics' global macro models and analyst projections estimate Bitcoin will reach 112,337 by the end of this quarter and 100,005 within one year.

BTC/USD is testing resistance at 123,500, with key support at 115,200.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
130,000	125,000	123,500	115,200	110,600	108,500

USDJPY



In early European trading on Monday, the Japanese yen moved between slight gains and losses against the U.S. dollar as investors weighed mixed economic signals. Risk-on sentiment and uncertainty over the Bank of Japan's next rate hike reduced its safe-haven appeal, though contrasting policy outlooks between the BoJ and the Federal Reserve helped prevent significant selling pressure on the currency.

USD/JPY is seeing resistance at 149.00, with support holding at 147.00.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
152.40	151.50	149.00	147.00	143.00	142.00

BRENT OIL



Brent crude oil futures climbed to \$66.7 per barrel on Tuesday, building on modest gains from the prior session after President Donald Trump extended the tariff truce with China by 90 days. The move came just before new tariffs were due, easing trade tensions that threaten global growth and energy demand. Investors also turned attention to upcoming U.S.–Russia talks on the Ukraine war, though Trump on Monday tempered expectations, describing the summit as an opportunity to “feel out” the possibility of a peace agreement.

Brent is currently facing resistance at \$68.50, with key support at \$63.25.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$73.80	\$70.00	\$68.50	\$63.25	\$61.20	\$60

NASDAQ



On Tuesday, August 12, the US 100 Tech Index stood at 23,560, down 85 points or 0.36% from the previous session. Over the past four weeks, the index declined 3.08%, though it remains up 23.96% over the past year. Trading Economics’ global macro models and analyst projections place the index at 23,174 by quarter-end and 21,912 within one year.

NASDAQ is currently testing resistance at 24,000, with support near 23,100.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$26,000	\$25,000	\$24,000	\$23,100	\$21,450	\$20,600

USD/CNH



The offshore yuan remained near 7.19 per dollar on Monday, holding recent losses as markets awaited the approaching U.S.–China tariff truce deadline, a key point for future trade relations. Negotiations have intensified, with chip policy at the forefront, and expectations favor an extension to prevent steep tariffs. Reports indicate Nvidia and AMD agreed to share part of their China revenues with the U.S. in exchange for export licenses, while Beijing seeks relief on advanced AI chip restrictions ahead of a potential Trump–Xi summit.

USD/CNH is currently testing resistance at 7.2150, while support is seen at 7.1580.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
7.2515	7.2315	7.2150	7.1580	7.1450	7.1125

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