

DAILY ANALYSIS

13 AUGUST 2025



Economic Calendar

Time	Cur.	Event	Forecast	Previous
06:00	EUR	German CPI (MoM) (Jul)	0.3%	0.0%
14:30	USD	Crude Oil Inventories	-	-3.029%

Risk Appetite Improves on Ukraine Peace Hopes

Global markets posted mixed performances as geopolitical developments and fresh economic data steered sentiment. The US 100 Tech Index ended August 12 at 23,560, slipping 0.36% from the prior session and 3.08% over the month, though still showing a strong 24% gain year-on-year. Precious metals were volatile, with gold holding near \$3,375 per ounce, supported by heightened expectations for Fed rate cuts and persistent trade tensions.

In currencies, the Japanese yen weakened to around 147.7 per dollar on mixed Bank of Japan signals, while the British pound climbed to \$1.34 following a Bank of England rate cut. The offshore yuan held steady near 7.18 per dollar, buoyed by upbeat services data and central bank guidance.

Geopolitics added another layer to market drivers. News of a planned meeting between U.S. President Donald Trump and Russian President Vladimir Putin lifted hopes for progress in the Ukraine conflict, easing risk aversion and impacting commodity prices. Traders now turn their attention to upcoming U.S. inflation data and U.S.-China tariff talks, both seen as pivotal for central bank policy direction. Trade sentiment received an extra push after Trump announced a 90-day extension to the U.S.-China trade deal deadline.

Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YoY
CURRENCIES					
EURUSD	1.16802	0.02%	0.15%	0.13%	12.76%
GBPUSD	1.35028	-0.01%	1.09%	0.56%	7.86%
AUDUSD	0.65284	-0.02%	0.44%	-0.23%	5.48%
NZDUSD	0.59546	-0.05%	0.46%	-0.27%	6.47%
USDJPY	147.975	0.14%	0.53%	0.13%	-5.96%
USDCAD	1.37784	0.06%	0.28%	0.53%	-4.17%
METALS					
XAUUSD	3350.85	0.08%	-0.54%	0.24%	27.68%
SILVER	38.209	0.79%	0.98%	0.23%	32.31%
PLATIN	1335.1	-0.11%	-0.40%	-4.64%	49.34%
INDICES					
S&P 500	6449.03	0.05%	1.64%	2.88%	9.65%
DOW JONES	44484	0.06%	0.66%	0.06%	4.56%
NASDAQ	23862	0.10%	2.35%	4.40%	13.56%
NIKKEI	43257	1.26%	6.04%	9.62%	8.43%
DAX	24181	0.65%	1.07%	0.08%	21.46%
ENERGY					
CRUDE OIL	63.191	0.03%	-1.80%	-5.66%	-11.89%
BRENT OIL	66.175	0.08%	-1.07%	-4.39%	-11.34%
NATURAL GAS	2.7976	-0.37%	-9.08%	-19.28%	-22.99%
BONDS					
US 10Y	4.286	0.80%	0.05%	-0.15%	-0.29%
DE 10Y	2.7398	4.32%	0.12%	0.01%	0.38%
JAPAN 10Y	1.523	2.29%	0.02%	-0.05%	0.43%
UK 10Y	4.629	6.07%	0.11%	0.02%	0.06%
CHINA 10Y	1.725	0.10%	0.01%	0.05%	0.05%

EURUSD



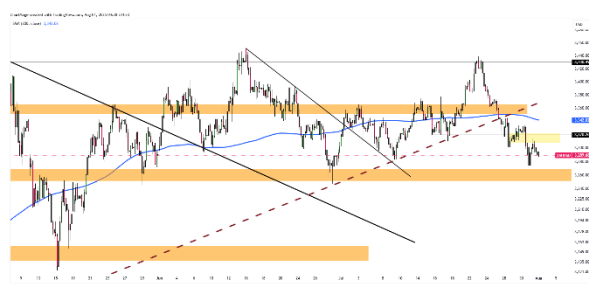
During the North American trading session, the EUR/USD pair climbed, influenced by mixed inflation data from the US and Trump's threats to take legal action against Fed Chair Jerome Powell. The currency pair is up 0.50%, trading around 1.1680.

Investor sentiment remains optimistic as US stock markets rose despite mixed Consumer Price Index (CPI) reports. While headline inflation remained steady, core figures exceeded expectations; however, traders largely overlooked this, having already factored in over a 90% likelihood of a Federal Reserve rate cut.

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



Gold hovered as market participants assessed the Federal Reserve's rate trajectory following the latest CPI report. The headline inflation rate for July was 2.7%, under the predicted 2.8%, whereas core inflation rose to 3.1% from 2.9%. This data softened concerns over tariff-driven price pressures, bolstering expectations of a 25 basis point rate reduction by the Fed in September and enhancing gold's attractiveness as a non-interest-bearing asset.

Upcoming economic indicators, including PPI, weekly jobless claims, and retail sales, are now in the spotlight.

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



Bitcoin decreased by 0.66% since the previous trading session. Looking back, over the last four weeks, the coin lost 0.42%, yet over the last 12 months, its price rose by 102.9%.

Bitcoin is expected to be priced at 112.337 by the end of this quarter and at 100.005 in one year, according to Trading Economics global macro models projections and analysts expectations.

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



The yen slipped, marking its third consecutive decline as improving global trade prospects reduced demand for the safe-haven currency. The US-China trade truce was extended for another 90 days, easing tensions and giving negotiators more time to reach an agreement.

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 crude futures hovered around \$66 per barrel on Wednesday, holding near a two-month low with signs of slowing demand. API data showed US crude inventories rose 1.52 million barrels last week, while gasoline stocks fell and distillates inched higher, suggesting the summer demand peak is nearing its end. Geopolitical uncertainty also lingered as Trump downplayed chances of a breakthrough, while Ukrainian President Zelensky rejected any territorial concessions.

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



The US 100 Tech Index closed at 23,862 on Wednesday, marking a gain of 313 points from the previous session. Over the past four weeks, the index has advanced 4.40%, and over the last year, it has risen 25.44%.

Looking ahead, Trading Economics' global macro models and analysts project the index to reach 23,174 by the end of this quarter and 21,912 within the next 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 edged higher, halting two straight sessions of losses, after the US and China agreed to extend their tariff truce by 90 days. The move, signed by Trump on Monday, delays steep duty hikes until mid-November, keeping US tariffs on Chinese goods at 30% and Chinese tariffs on US goods at 10%, instead of a steep 145% and 125%, respectively, a scenario that could have amounted to a near trade embargo.

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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