

DAILY ANALYSIS

14 AUGUST 2025



Economic Calendar

Time	Cur.	Event	Forecast	Previous
06:00	GBP	GDP (YoY) (Q2)	1.0%	1.3%
06:00	GBP	GDP (MoM) (Jun)	0.2%	-0.1%
06:00	GBP	GDP (QoQ) (Q2)	0.1%	0.7%
12:30	USD	Initial Jobless Claimless	225K	226K
12:30	USD	PPI (MoM) (Jul)	0.2%	0.0%
23:50	JPY	GDP (QoQ) (Q2)	0.1%	0.0%

Markets Rally on Fed Cut Expectations

Global markets rode a wave of shifting monetary policy bets and geopolitical intrigue this week. In the US, July CPI eased to 2.7%, under expectations, while core inflation ticked up to 3.1%. Coupled with signs of a cooling labor market, the data fueled the conviction that the Fed will cut rates in September, potentially by 50 bps.

The weaker dollar sent the euro to a near three-week high and the yen to 146.5, while gold rallied toward \$3,370 as investors sought safety. Oil also bounced back, with Brent crude climbing to \$65.8 after a two-day slide, supported by a risk premium ahead of high-stakes talks between Presidents Trump and Putin over the Ukraine conflict, talks that could reshape sanctions on Russian energy and ripple through global commodities.

Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YoY
CURRENCIES					
EURUSD	1.17033	-0.08%	0.23%	0.83%	12.98%
GBPUSD	1.3576	-0.07%	0.93%	1.37%	8.44%
AUDUSD	0.65519	0.02%	0.41%	0.51%	5.86%
NZDUSD	0.59747	-0.08%	0.10%	0.34%	6.82%
USDJPY	146.465	-0.44%	-0.23%	-1.55%	-6.92%
USDCAD	1.37586	0.04%	0.19%	0.31%	-4.30%
METALS					
XAUUSD	3361.3	0.14%	-1.00%	1.09%	28.08%
SILVER	38.586	0.20%	0.80%	2.35%	33.61%
PLATIN	1333.3	-0.35%	-1.25%	-4.51%	49.14%
INDICES					
S&P 500	6464.32	-0.03%	1.96%	3.53%	9.91%
DOW JONES	44949	0.06%	2.23%	2.10%	5.65%
NASDAQ	23845	-0.02%	1.95%	4.20%	13.48%
NIKKEI	42683	-1.37%	3.95%	7.57%	6.99%
DAX	24159	-0.11%	-0.14%	0.41%	21.34%
ENERGY					
CRUDE OIL	62.893	0.39%	-1.55%	-5.45%	-12.31%
BRENT OIL	65.875	0.37%	-0.84%	-4.13%	-11.74%
NATURAL GAS	2.8366	0.30%	-7.51%	-19.48%	-21.92%
BONDS					
US 10Y	4.24	0.50%	-0.02%	-0.25%	-0.34%
DE 10Y	2.6801	6.30%	0.04%	-0.05%	0.32%
JAPAN 10Y	1.553	3.23%	0.07%	-0.04%	0.46%
UK 10Y	4.594	3.50%	0.06%	-0.01%	0.03%
CHINA 10Y	6.458	1.30%	0.07%	0.15%	-0.34%



The euro marked a near three-week peak and a second straight day of gains as the dollar weakened to its lowest level since late July. US inflation figures reinforced expectations that the Fed could cut rates in September, fueling risk appetite across global markets.

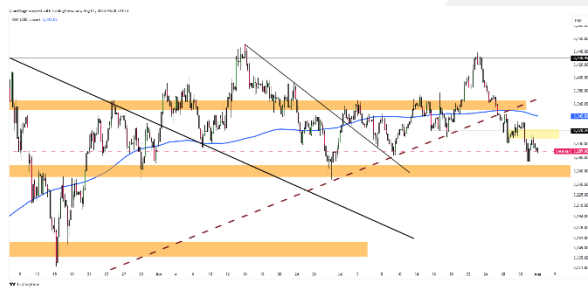
The ECB halted its easing policy in July after eight rate cuts in the past year, keeping borrowing costs at their

lowest since November 2022. However, another cut before year-end remains possible. The Eurozone's GDP rose by 0.1% in Q2, while inflation in July stayed unchanged at 2%.

EUR/USD is currently testing resistance at 1.1770, with key support at 1.1640.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1900	1.1830	1.1770	1.1640	1.1500	1.1350

XAUUSD



Gold advanced, posting its third consecutive gain as bets increased for renewed Fed rate cuts. Softer inflation data reduced tariff-related inflation fears, and signs of a weakening labor market strengthened the case for monetary easing.

Investors largely expect a 25 bps cut in September, though some are positioning for a 50 bps reduction. Supporting this view, Treasury Secretary Scott

Bessent urged the Fed to deliver multiple cuts, starting with a half-point move.

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



Bitcoin traded at \$123,821, rising by 0.38% from the previous session. Over the past four weeks, it gained 5.11%, and over the last 12 months, it surged 114.78%. Looking ahead, Trading Economics projects BTC to reach 112,337 by the end of this quarter and 100,005 within a year, based on global macro models and analyst expectations.

BTC/USD is testing resistance at 123,500, with key support at 117,200.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
130,000	127,000	124,500	117,200	112,600	108,500

USDJPY



The yen appreciated to roughly 146.5 per dollar on Thursday, its strongest level in three weeks, as mounting expectations for Federal Reserve rate cuts pressured the US currency. Weaker US inflation data indicated that Trump's tariffs are not fueling price growth, while signs of a softening labor market reinforced the dovish outlook.

Adding to the sentiment, Treasury Secretary Scott Bessent urged multiple cuts, suggesting the Fed could start with a 50 bps reduction.

USD/JPY is seeing resistance at 148.00, with support holding at 145.00.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
152.40	151.50	148.00	145.00	143.00	140.00

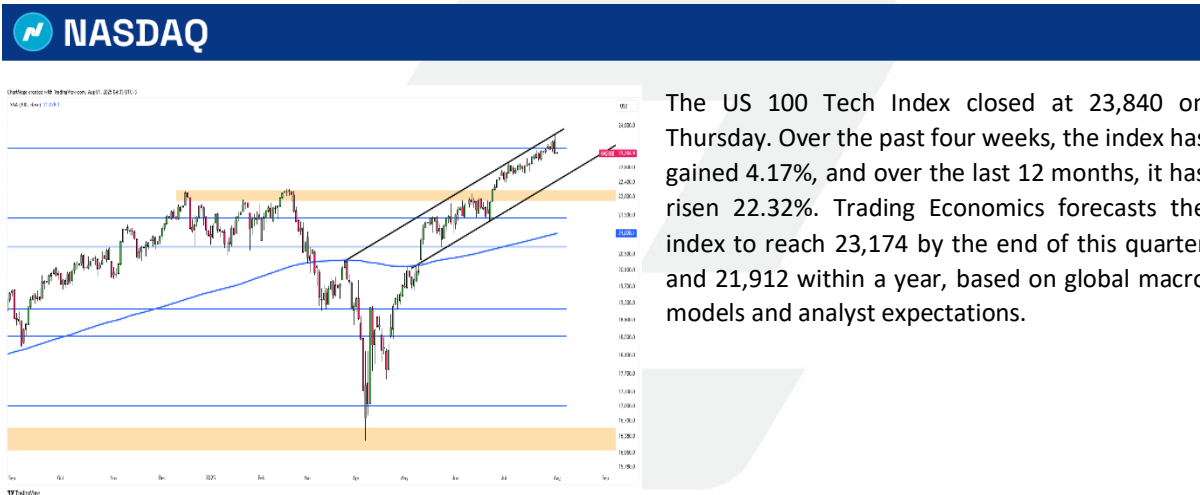
BRENT OIL



Brent crude oil futures rose to around \$65.8 per barrel, halting a two-day decline, supported by a risk premium ahead of talks between Trump and Putin. Trump warned late Wednesday that Russia would face “very severe consequences” if Putin refuses to end the Ukraine war. While he did not specify the measures, he has previously threatened economic sanctions, including on Russian oil, if Friday’s meeting in Alaska ends without results.

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 23,840 on Thursday. Over the past four weeks, the index has gained 4.17%, and over the last 12 months, it has risen 22.32%. Trading Economics forecasts the index to reach 23,174 by the end of this quarter and 21,912 within a year, based on global macro models and analyst expectations.

NASDAQ is currently testing resistance at 24,500, with support near 23,200.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$26,000	\$25,000	\$24,500	\$23,200	\$21,450	\$20,600



The offshore yuan strengthened, marking its third consecutive session of gains, as the greenback weakened with a more dovish outlook from the Federal Reserve.

Markets have nearly fully priced in a rate cut for September, with some investors even anticipating a more aggressive 50 bps reduction amid soft US inflation data and a cooling labor market.

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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