DAILY ANALYSIS

13 NOVEMBER 2025

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Economic Calendar

Time	Cur.	Event	Forecast	Previous
07:00	GBP	GDP(QoQ)(Q3)	0.2%	0.3%
18:00	USD	30-Year Bond Auction	-	4.734%

Gold Jumps After Shutdown Resolution

President Trump signed the government funding bill, ending the 43-day shutdown and saying, "Let's get our country working again." Gold moved above $4,200 per ounce and silver reached $54 following the announcement. Attention now shifts to U.S. economic releases that were delayed during the shutdown, though the White House indicated that October's jobs and CPI data may not be issued.

Pricing now reflects a 60% probability of a 25-basis-point Fed cut in December, slightly below the 67% seen a day earlier. ADP figures showed private-sector employment falling by roughly 11,250 jobs each week through October, adding pressure to the labor outlook. The latest 10-year Treasury auction also recorded a small tail.

In Japan, the 10-year government bond yield held near 1.7%, a 17-year high. Prime Minister Sanae Takaichi called on the Bank of Japan to maintain low rates and asked Governor Kazuo Ueda to provide consistent updates to the Council on Economic and Fiscal Policy. Current pricing assigns a 24% chance of a rate increase in December, rising to 46% for January. Ueda told parliament the BOJ remains focused on achieving steady inflation driven by wage gains and stable economic growth, in line with the government's pro-growth approach.

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Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
CURRENCIES					
EURUSD	1.15839	0.01%	0.80%	0.12%	11.83%
GBPUSD	1.31498	-0.01%	0.76%	-1.38%	5.04%
AUDUSD	0.65296	0.03%	0.38%	0.23%	5.49%
NZDUSD	0.56551	-0.08%	-0.09%	-1.34%	1.11%
USDJPY	154.118	-0.03%	0.00%	1.21%	-2.05%
USDCAD	1.40145	-0.02%	-0.67%	-0.15%	-2.52%
METALS					
XAUUSD	4209.52	0.34%	5.84%	1.60%	60.40%
SILVER	53.93	1.24%	12.28%	4.90%	86.74%
PLATIN	1630.6	0.82%	6.54%	-0.97%	82.39%
INDICES					
S&P 500	6855.82	0.13%	0.88%	3.02%	16.56%
DOW JONES	48337	0.85%	2.17%	4.93%	13.62%
NASDAQ	25559	0.10%	-0.24%	3.27%	21.64%
NIKKEI	51350	1.00%	2.27%	9.61%	28.71%
DAX	24381	1.22%	1.38%	-0.03%	22.46%
ENERGY					
CRUDE OIL	58.436	-0.09%	-1.67%	-0.45%	-18.52%
BRENT OIL	62.654	-0.09%	-1.15%	0.42%	-16.06%
NATURAL GAS	4.5328	0.00%	4.03%	49.70%	24.77%
BONDS					
US 10Y	4.088	1.30%	0.00%	0.06%	-0.49%
DE 10Y	2.6465	1.09%	-0.03%	0.02%	0.28%
JAPAN 10Y	1.699	0.77%	0.02%	0.04%	0.61%
UK 10Y	4.403	1.16%	-0.06%	-0.26%	-0.17%
CHINA 10Y	1.807	0.50%	0.05%	0.04%	0.13%

EURUSD

The euro failed to break above the 1.1600 level as risk appetite improved after the expectations of the U.S. government reopening before the House vote on the stopgap funding bill. EUR/USD held around 1.1590 as markets waited for confirmation that the prolonged shutdown would end.

Fed officials offered mixed signals: John Williams hinted at potential balance-sheet expansion, while Raphael Bostic emphasized the importance of maintaining price stability. In Europe, German inflation remained steady near the ECB’s 2% target, highlighting the diverging policy outlooks between the ECB and the Fed.

For EURUSD, 1.1490 serves as key support, with resistance near 1.1600.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1710	1.1670	1.1600	1.1490	1.1430	1.1360

XAUUSD

Gold prices hovered around $4,180 per ounce, staying at their highest level in three weeks as uncertainty surrounding the U.S. economic outlook and expectations of further Federal Reserve easing supported demand.

The White House warned that October’s official jobs and inflation releases may be delayed, complicating assessments of economic strength. Private labor data showed continued job cuts across U.S. firms in recent weeks. Traders now price in roughly a 65% chance of a 25-basis-point reduction next month. Gold has gained nearly 5% so far this week, helped by growing expectations that the Fed has space to ease further.

From a technical view, support is seen near $4160, while resistance is positioned around $4225.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
4295	4240	4225	4160	4095	4070

BTCUSD

Bitcoin traded at $102,189 on Thursday, gaining 542 points from the previous session. Over the last four weeks, the cryptocurrency advanced 9.65%, and it is now 17.14% higher than it was a year ago.

BTC/USD is currently testing resistance at 103.500, with support at 99.100

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
107.800	105.200	103.500	99.100	98.300	95.200

USDJPY

The Japanese yen hovered around 154.7 per dollar after Prime Minister Sanae Takaichi urged the Bank of Japan to maintain low interest rates. Takaichi also asked BOJ Governor Kazuo Ueda to provide regular policy briefings to the government's Council on Economic and Fiscal Policy. In parliament, Ueda reiterated that the central bank remains committed to achieving moderate inflation backed by wage gains and stable economic growth, aligning with Takaichi's pro-growth stance. Markets now see a 24% chance of a 25-basis-point rate hike in December, rising to 46% in January.

Finance Minister Satsuki Katayama repeated warnings about excessive yen weakness as the currency approached the 155 level, stressing that rapid, one-sided moves are undesirable. On the data side, Japan's producer prices rose more than expected in October.

Technically, resistance stands near 155.20, while support is firm at 154.40.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
156.9	156.20	155.20	154.40	152.50	151.60

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BRENT OIL

Brent slipped toward $64 per barrel after OPEC projected a well-supplied oil market ahead. The group now expects global output to match demand by 2026, revising its earlier deficit outlook, and noted that supply already outpaced demand in the third quarter.

The US Energy Information Administration raised its 2025 domestic production forecast, and the International Energy Agency now sees global oil consumption continuing to grow until 2050. The IEA's monthly report is expected later today, while industry data showing a 1.3-million-barrel rise in US crude stockpiles added to bearish sentiment.

Brent faces resistance near $64.20, while support stands around $62.20.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
$66.70	$65.20	$64.20	$62.2	$61.90	$60.70

NASDAQ

The US 100 Tech Index traded at 25,603, edging down 0.06% from the previous session.

Nasdaq finds resistance at 25,760, while support holds around 25.450.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
$26,265	$26,000	$25,760	$25,450	$24,920	$24,490

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USDCNH

The offshore yuan strengthened beyond 7.10 per dollar as retail sales are expected to slow for a fifth straight month, the longest downturn in consumption growth since the post-pandemic rebound began to fade over four years ago.

The data, covering retail sales, housing, industrial production, and unemployment, may deepen worries over broader economic weakness.

USD/CNH is testing resistance at 7.1160, while support is seen near 7.0950.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
7.1340	7.1280	7.1160	7.0950	7.0820	7.0720

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