

DAILY ANALYSIS

14 OCTOBER 2025



Economic Calendar

Time	Cur.	Event	Forecast	Previous
06:00	EUR	German CPI (MoM) (Sep)	0.2%	0.1%
06:00	GBP	Unemployment Rate (Aug)	4.7%	4.7%
09:00	CNY	New Loans (Sep)	1.460B	590B
16:20	USD	Fed Chair Powell Speaks		

Tech Rally Lifts Wall Street as Trump Signals Stability

U.S. stock futures ticked higher on Tuesday, extending gains after a strong start to the week as investors welcomed signs of stability in U.S.-China trade relations. President Donald Trump struck a reassuring tone on Monday, saying trade ties with Beijing remain “on track,” easing fears of further escalation.

The positive sentiment lifted Wall Street, with the Dow Jones Industrial Average climbing 1.29%, the S&P 500 up 1.56%, and the Nasdaq jumping 2.21%-recovering about half of Friday’s sharp selloff. The rebound was led by tech heavyweights, as Tesla, Nvidia, and Broadcom rallied between 2.8% and 9.9%. Gains also extended to speculative corners of the market, with quantum computing, clean energy, and rare earth stocks seeing renewed enthusiasm.

U.S. Treasury Secretary Scott Bessent said Monday that Trump is still expected to meet Chinese President Xi Jinping in South Korea later this month, as both sides continue discussions aimed at cooling trade tensions. He added that tariffs will remain on hold until November 1, signaling a temporary pause in escalation.

However, friction persists: China has begun imposing port fees on vessels linked to the U.S., with Washington preparing a reciprocal response on October 14, marking a new front in the ongoing trade dispute.

In the bond market, the 10-year Treasury yield edged up to 4.06% on Monday, a modest increase of one basis point from the previous session. The U.S. dollar index held firm above 99.2, buoyed by optimism that trade negotiations are progressing despite political uncertainty and a government shutdown that continues to delay key economic data.

The greenback strengthened further against the Japanese yen, with traders citing growing uncertainty around Japan’s political leadership as a key driver.

With macro data limited, investor attention now turns to corporate results for direction. Earnings from JPMorgan Chase and Goldman Sachs, due later this week, are expected to provide a clearer picture of the banking sector’s resilience and the broader financial outlook.

Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
CURRENCIES					
EURUSD	1.15804	0.13%	-0.66%	-1.55%	11.80%
GBPUSD	1.33457	0.10%	-0.59%	-1.88%	6.60%
AUDUSD	0.64922	-0.29%	-1.35%	-2.70%	4.89%
NZDUSD	0.57091	-0.13%	-1.64%	-4.33%	2.08%
USDJPY	152.056	-0.26%	0.10%	3.16%	-3.37%
USDCAD	1.40406	0.01%	0.65%	1.93%	-2.34%
METALS					
XAUUSD	4163.63	0.87%	4.46%	13.16%	58.65%
SILVER	53.18	1.45%	11.19%	24.57%	84.15%
PLATIN	1691	0.47%	3.51%	20.10%	89.15%
INDICES					
S&P 500	6649.42	-0.08%	-0.97%	0.52%	13.05%
DOW JONES	46081	0.03%	-1.12%	0.43%	8.31%
NASDAQ	24712	-0.15%	-0.51%	1.72%	17.61%
NIKKEI	47228	-1.79%	-1.51%	5.18%	18.38%
DAX	24388	0.00%	0.01%	2.69%	22.50%
ENERGY					
CRUDE OIL	59.718	0.38%	-3.26%	-5.66%	-16.73%
BRENT OIL	63.564	0.38%	-2.88%	-5.75%	-14.84%
NATURAL GAS	3.0876	-0.97%	-11.73%	1.47%	-15.01%
BONDS					
US 10Y	4.052	0.10%	-0.08%	0.01%	-0.52%
DE 10Y	2.6301	0.39%	-0.09%	-0.07%	0.27%
JAPAN 10Y	1.679	1.70%	0.00%	0.08%	0.59%
UK 10Y	4.66	1.37%	-0.08%	0.02%	0.09%
CHINA 10Y	1.777	1.20%	-0.15%	-0.11%	0.10%

EURUSD



The euro traded near \$1.1600, close to last week's two-month low of \$1.1540 after political uncertainty in France and US-China trade developments. French Prime Minister Sebastien Lecornu, reappointed after briefly resigning, faces a tough challenge to pass the draft budget by Monday's deadline. He is seeking support or abstention from both Socialists and center-right Republicans.

Most lawmakers oppose dissolving parliament. Trump adopted a softer stance on China after earlier tariff threats.

Technically, 1.1540 is the key support, while resistance is seen at 1.1630.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1760	1.1720	1.1630	1.1540	1.1480	1.1410

XAUUSD



Gold surged to a record \$4,150 per ounce following US-China trade tensions and expectations of US interest rate cuts. President Trump recently threatened new tariffs on Chinese goods and imposed export controls, prompting Beijing to warn of countermeasures.

Concerns also persist over the ongoing US government shutdown, which Treasury Secretary Scott Bessent said is starting to impact the economy. Market attention now turns to Powell's remarks for guidance on future rate cuts.

From a technical perspective, support is around 4090, and resistance is at 4180.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
4250	4210	4180	4090	4035	3930

BTCUSD



Bitcoin held onto gains after investors digested last week's sell-off. Total single-day liquidations across all cryptocurrencies reached a record \$19 billion, with altcoins most affected. Despite ongoing macroeconomic uncertainty, Bitcoin, Ethereum, and Ripple have rebounded, offering some relief to leveraged traders facing significant losses.

BTC/USD is testing resistance at 116.500 with support at 111.120.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
120,800	118,700	116,500	111,120	109,200	106,450

USDJPY



The Japanese yen weakened today as Japan's Komeito party exited the ruling coalition, casting doubt on Sanae Takaichi's policy plans and premiership prospects. Finance Minister Katsunobu Kato highlighted that inflation, not deflation, is the main concern and cautioned against rapid, one-sided currency moves. The yen also faced pressure from a stronger dollar, supported by easing US-China trade tensions and the anticipated meeting between Presidents Trump and Xi later this month.

Resistance is at 153.20, while support holds at 151.10

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
156.80	154.60	153.20	151.10	149.20	147.90

BRENT OIL



Brent crude was supported by hopes of easing US-China trade tensions after President Trump signaled openness to a deal with Beijing. Treasury Secretary Scott Bessent confirmed Trump's planned meeting with Chinese President Xi in South Korea remains on track.

Prices were also lifted by Trump's consideration of supplying Ukraine with long-range missiles, raising concerns over Russian supply. Gains were limited, however, as tensions eased following hostages' release and concerns persisted over a potential supply glut from rising global

output.

Brent faces resistance at \$64.90, with key support at \$62.20.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$67.90	\$66.50	\$64.90	\$62.20	\$61.50	\$60.10

NASDAQ



The NASDAQ Tech Index slipped modestly in today's session, though short-term pullbacks are expected to attract buyers with support seen around 24,500. While the index may consolidate around this psychologically significant figure, buying pressure is expected to persist.

The long-term trend remains upward, continuing a slow but steady climb over recent months, and current chart patterns show no immediate signs of a major sell-off.

Nasdaq is facing resistance around 24,940, while support remains firm near 24,570.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$25,470	\$25,200	\$24,940	\$24,570	\$24,200	\$24,010

USD/CNH



The offshore yuan slipped to around 7.14 per dollar, trading in a narrow range with cautious optimism over US-China trade talks. Treasury Secretary Scott Bessent confirmed President Trump's planned meeting with Xi Jinping in South Korea later this month. Concerns remain over a lasting trade deal, while China defended its rare earth export controls as a national security measure.

The PBOC supported the yuan with stronger midpoint guidance, and investors now await China's upcoming inflation report, expected to show a slight monthly gain

despite a modest annual contraction.

USD/CNH is testing resistance at 7.1470, with support at 7.1350.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
7.1640	7.1520	7.1470	7.1350	7.1170	7.1060

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