

DAILY ANALYSIS

22 OCTOBER 2025



Economic Calendar

Time	Cur.	Event	Forecast	Previous
06:00	GBP	CPI (YoY) (Sep)	4.0%	3.8%
14:30	USD	Crude Oil Inventories	-	3.524M
17:00	USD	20-Year Bond Auction	-	4.613%

Gold Drops 6% and Yen Weakens

Financial markets delivered a mixed performance this week as participants weighed policy signals, trade developments, and fresh macro data. The euro edged lower to \$1.16, with attention turning to upcoming European Central Bank speeches for direction ahead of next week's policy meeting. The yen weakened past 152 per dollar after Sanae Takaichi became Japan's first female prime minister, as investors assessed the fiscal outlook under the new coalition government.

In Asia, the offshore yuan held near 7.1250 per dollar, supported by the People's Bank of China's firm midpoint and optimism surrounding renewed U.S.–China trade talks. Commodities remained volatile: gold fell over 6% to \$4,100 per ounce on profit-taking and dollar strength, while Brent crude steadied around \$61.5 per barrel as oversupply concerns persisted.

Across broader markets, Bitcoin slipped 1.17% to \$108,365, though it remains up more than 60% year-on-year, while the U.S. 100 Tech Index eased 0.06% to 25,093, reflecting a measured tone following mixed corporate earnings. Overall, investors balanced improving trade sentiment against lingering questions over growth and monetary policy direction.

Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
CURRENCIES					
EURUSD	1.16008	0.01%	-0.40%	-1.82%	11.99%
GBPUSD	1.33692	-0.01%	-0.26%	-1.14%	6.79%
AUDUSD	0.64916	0.05%	-0.32%	-1.62%	4.88%
NZDUSD	0.57418	-0.03%	0.52%	-1.96%	2.66%
USDJPY	151.948	0.01%	0.59%	2.94%	-3.43%
USDCAD	1.40207	-0.01%	-0.15%	1.32%	-2.48%
METALS					
XAUUSD	4118.87	-5.48%	-0.59%	9.92%	56.95%
SILVER	48.48	-7.36%	-5.70%	10.03%	67.87%
PLATIN	1510.3	-7.81%	-8.28%	6.05%	68.94%
INDICES					
S&P 500	6736.49	0.02%	1.39%	0.64%	14.53%
DOW JONES	46934	0.49%	1.43%	1.19%	10.32%
NASDAQ	25107	-0.14%	2.15%	1.40%	19.49%
NIKKEI	49335	0.30%	5.31%	8.44%	23.66%
DAX	24330	0.29%	0.38%	3.41%	22.21%
ENERGY					
CRUDE OIL	57.577	0.98%	-1.91%	-7.55%	-19.72%
BRENT OIL	61.625	1.01%	-1.23%	-7.43%	-17.44%
NATURAL GAS	3.5131	3.42%	16.02%	25.20%	-3.30%
BONDS					
US 10Y	3.974	0.90%	-0.06%	-0.18%	-0.60%
DE 10Y	2.5523	3.16%	-0.05%	-0.20%	0.19%
JAPAN 10Y	1.663	0.57%	0.00%	0.00%	0.57%
UK 10Y	4.488	2.59%	-0.10%	-0.23%	-0.08%
CHINA 10Y	1.767	0.90%	0.00%	-0.11%	0.09%

EURUSD



Euro weakened slightly below 1.16 as market participants awaited remarks from the European Central Bank that could indicate the direction of monetary policy. The ECB will observe a pre-meeting blackout starting Thursday, prior to next week's rate decision. On the other hand, the US dollar received moderate support from easing tensions between the US and China, along with hopes for the imminent conclusion of the US government shutdown.

Technically, 1.1575 is the key support, while resistance is seen at 1.1650.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1820	1.1725	1.1650	1.1575	1.1530	1.1480

XAUUSD



Gold steadied around \$4,120 per ounce on Wednesday after its sharpest drop since 2021, as profit-taking and improved risk sentiment amid easing US-China tensions weighed on prices. Softer demand from India after the festive season also pressured the market. Still, the metal remains up nearly 60% this year, supported by expectations of further Fed rate cuts and ongoing global uncertainty ahead of Friday's CPI data.

From a technical perspective, support is around 4080, and resistance is at 4180.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
4300	4220	4180	4080	4040	3980

BTCUSD



Bitcoin was priced at \$108,365, down 1.17% from the previous trading session. Over the past month, Bitcoin has decreased by 3.03%, but its value has risen 62.15% yearly.

The pair is testing resistance at 110.000 with support at 107.020.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
118,800	114,300	110,000	107,020	104,200	102,450

USDJPY



The yen hovered near 151.7 per dollar on Wednesday after tumbling on reports that new Prime Minister Sanae Takaichi plans a massive stimulus package exceeding last year's ¥13.9 trillion. Her expansionary policies, including higher spending and possible tax cuts, alongside the BOJ's cautious stance on rate hikes, weighed on the currency. Japan's new finance minister favors a stronger yen, while a surprise September trade surplus offered mild support.

Resistance is at 152.20, while support holds at 150.30.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
153.50	152.80	152.30	150.30	149.70	147.90

BRENT OIL



Brent crude climbed above \$62 per barrel on Wednesday, rebounding from multi-year lows amid renewed supply concerns. The postponement of the Trump–Putin summit after Moscow rejected a Ukraine ceasefire fueled fears of geopolitical and sanctions-related disruptions. Western efforts to limit Russian oil exports and a planned U.S. reserve refill added support, while data showing a 3 million-barrel drop in U.S. crude stocks reinforced the bullish tone.

Brent faces resistance at \$62.00, with key support at \$60.25

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$64.90	\$63.50	\$62.00	\$60.25	\$59.10	\$58.20

NASDAQ



The US 100 Tech Index traded at 25,093, falling 14 points from the previous session. Monthly, the index declined 1.34%, though it remains up 23.11% over the past 12 months.

Nasdaq is facing resistance around 25,600, while support remains firm near 24,700.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$26,250	\$26,000	\$25,600	\$24,700	\$24,130	\$23,910



The offshore yuan held near 7.12 per dollar on Wednesday as traders awaited progress in US–China trade talks. President Trump voiced optimism about a deal but said a meeting with Xi Jinping may not happen soon. Treasury Secretary Scott Bessent and Vice Premier He Lifeng will meet in Malaysia to address tariffs and rare earth issues, while China’s ongoing Fourth Plenum outlines its next five-year economic plan and internal reforms.

USD/CNH is testing resistance at 7.1300, with support at 7.1175.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
7.1640	7.1490	7.1300	7.1175	7.1080	7.0920



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