

DAILY ANALYSIS

24 OCTOBER 2025



Economic Calendar

Time	Cur.	Event	Forecast	Previous
12:30	USD	Core CPI (MoM) (Sep)	0.3%	0.3%
12:30	USD	CPI (MoM) (Sep)	0.4%	0.4%
12:30	USD	CPI (YoY) (Sep)	3.1%	2.9%
13:45	USD	S&P Global Manufacturing PMI (Oct)	51.9	52.0
13:45	USD	S&P Global Services PMI	53.5	54.2
14:00	USD	New Home Sales (Sep)	710K	800K

Tech Index Climbs, Bitcoin Tops \$110K

Financial markets showed a mixed but steady tone this week, with currencies, commodities, and digital assets reacting to policy signals, geopolitical shifts, and fresh economic data. The EUR/USD pair held near 1.1620, as the U.S. Dollar edged up 0.05% ahead of September's CPI release. Attention stayed on U.S.-China trade discussions and the 23-day U.S. government shutdown, both key themes shaping sentiment.

The Japanese yen slipped past 152 per dollar, nearing an eight-month low, as expectations grew that Prime Minister Sanae Takaichi will unveil a major stimulus package next month, possibly larger than last year's ¥13.9 trillion plan aimed at easing inflation pressures. Analysts foresee continued supportive fiscal and monetary policy, with the Bank of Japan likely keeping rates unchanged until a potential hike in January.

Gold rebounded to \$4,130 per ounce, snapping a two-day slide after new U.S. trade restrictions on China and fresh sanctions on Russia. Brent crude climbed to \$66 per barrel, a two-week high, supported by reduced Chinese and Indian imports and pressure on Russian oil exports.

Across other assets, Bitcoin rose to \$110,395, marking moderate weekly gains and a strong year-to-date performance, while the U.S. 100 Tech Index advanced 0.88% to 25,169, continuing its upward trend. The offshore yuan remained stable around 7.12 per dollar ahead of the Trump-Xi meeting.

Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
CURRENCIES					
EURUSD	1.16189	0.01%	-0.30%	-0.37%	12.17%
GBPUSD	1.33314	0.04%	-0.70%	-0.03%	6.49%
AUDUSD	0.65158	0.06%	0.28%	-0.34%	5.27%
NZDUSD	0.57567	0.04%	0.63%	-0.13%	2.93%
USDJPY	152.572	0.01%	1.32%	1.80%	-3.04%
USDCAD	1.39862	-0.04%	-0.25%	0.32%	-2.72%
METALS					
XAUUSD	4129.97	0.09%	-2.83%	10.14%	57.37%
SILVER	48.912	-0.02%	-5.83%	8.19%	69.37%
PLATIN	1587.2	0.53%	-1.28%	3.69%	77.54%
INDICES					
S&P 500	6747.55	0.14%	1.25%	2.16%	14.72%
DOW JONES	46732	-0.01%	1.17%	1.71%	9.84%
NASDAQ	25169	0.29%	1.42%	3.16%	19.78%
NIKKEI	49228	1.21%	3.46%	7.59%	23.40%
DAX	24238	0.13%	1.71%	2.99%	21.74%
ENERGY					
CRUDE OIL	61.594	-0.32%	7.78%	-5.21%	-14.12%
BRENT OIL	65.792	-0.30%	7.35%	-4.07%	-11.85%
NATURAL GAS	3.2864	-1.72%	9.26%	2.86%	-9.54%
BONDS					
US 10Y	4.007	0.20%	-0.01%	-0.16%	-0.57%
DE 10Y	2.5876	2.84%	0.02%	-0.16%	0.23%
JAPAN 10Y	1.664	0.31%	0.03%	0.01%	0.57%
UK 10Y	4.435	0.03%	-0.07%	-0.24%	-0.13%
CHINA 10Y	1.773	0.60%	0.00%	-0.13%	0.09%

EURUSD



During the Asian session on Friday, the EUR/USD pair traded steadily, with the dollar edging up around 0.05% with predictions for the US inflation results for September. The pair hovered at 1.1620 after briefly touching 1.1610. Most traders disregarded recent figures as attention shifted to the prolonged US government shutdown and renewed trade tensions with China. Consumer Price Index (CPI) release is now awaited, which will reveal that both headline and core inflation rose beyond 3%.

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 prices rose to approximately \$4,130 per ounce, pausing a two-day decline. The US reportedly considered restricting exports of American software to China, while Trump confirmed intentions to meet with Xi Jinping. Meanwhile, new US sanctions were imposed on Russia following Moscow's refusal of a Ukraine ceasefire, causing the Trump-Putin summit to be postponed. Markets are now focused on the upcoming US Consumer Price Index (CPI) release.

From a technical perspective, support is around 4080, and resistance is at 4155.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
4300	4210	4155	4080	4015	3980

BTCUSD



Bitcoin traded at \$110,395 on Friday, marking a gain of 383 points from the previous session. Looking back, Bitcoin has increased by 1.27% over the past four weeks and surged 66.73% in the last 12 months.

BTC/USD is testing resistance at 112.000 with support at 107.020.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
118,800	114,300	112,000	107,020	104,200	102,450

USDJPY



The yen dropped past 152 per dollar, nearing its lowest level in eight months with rising expectations that Prime Minister Sanae Takaichi will introduce an economic stimulus package as early as next month. Sources noted that the plan may exceed the ¥13.9 trillion package rolled out last year to reduce inflation burdens on consumers.

Takaichi, sworn in on Tuesday, is expected to implement fiscal expansion while backing the central bank's loose monetary policy. At the same time, the Bank of Japan is expected to keep interest rates unchanged next week, with markets predicting the next hike in January.

Resistance is at 153.00, while support holds at 150.30.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
155.50	154.50	153.00	150.30	149.70	147.90

BRENT OIL



Brent crude oil futures traded around \$66 per barrel, reaching a two-week high and positioning for their strongest weekly gain since early June. The rise came with fresh US sanctions targeting major Russian oil producers.

Washington blacklisted state-owned companies Rosneft and Lukoil to pressure Moscow over the Ukraine war. These two firms account for nearly half of Russia's oil exports and are crucial to the Kremlin's budget. Following the sanctions, Chinese state oil companies reportedly stopped seaborne

Russian oil purchases, while Indian refiners plan significant import cuts to comply with the measures.

Brent faces resistance at \$66.25, with key support at \$60.00.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$69.90	\$68.25	\$66.25	\$60.00	\$58.75	\$57.65

NASDAQ



The Nasdaq traded at 25,169, marking a rise of 88% compared to the prior trading session. Over the last month, the index rose by 3.16%, and over the past 12 months, it has increased by 23.67%.

The index 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

USD/CNH



The offshore yuan remained around 7.12 per dollar before the upcoming meeting between Presidents Donald Trump and Xi Jinping, with ongoing US-China trade tensions. Trump stated on Wednesday that he expected to secure multiple agreements with Xi during talks in South Korea next week, including the resumption of Chinese purchases of US soybeans, discussions on China's purchases of Russian oil, and potential measures to end the war in Ukraine.

Trade tensions have escalated recently after Trump threatened to impose additional 100% tariffs on Chinese imports in response to Beijing's wide-ranging export controls on almost all rare earth materials.

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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