DAILY ANALYSIS

03 August 2026

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Economic Calendar

Time	Cur.	Event	Forecast	Previous
13:45	USD	S&P Global Manufacturing PMI (Jul)	53.8	53.8
14:00	USD	ISM Manufacturing PMI (Jul)	54.0	53.3
14:00	USD	ISM Manufacturing Prices (Jul)	70.0	73.0

Wall Street Turns to Earnings

US stock futures edged higher as attention shifted to another busy earnings week featuring Berkshire Hathaway, Eli Lilly, Caterpillar, McDonald's, Disney, Palantir, AMD, and SpaceX. Focus also turns to Friday's jobs report, while oil slipped after President Trump said Iran peace talks would resume.

Japan's 10-year yield climbed above 2.8%, a three-week high, as traders increased expectations for another BOJ rate hike. Governor Kazuo Ueda warned inflation risks require close attention, even as he expects underlying inflation to move toward the 2% target from the second half of FY2026.

The 10-year Treasury yield eased to around 4.7% after reaching an 18-month high, with attention turning to a busy week of US labor data. The Fed held rates steady last week despite three dissents, while markets continue to price a 68% chance of a September hike.

The Dollar Index slipped toward 99.5, marking a fifth consecutive decline after Japan confirmed coordinated yen-buying with the US. BOJ data suggested intervention reached $58.97 billion on Thursday, while officials signaled they remain prepared to step in again if necessary.

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Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
CURRENCIES					
EURUSD	1.1528	0.03%	1.41%	0.76%	-1.81%
GBPUSD	1.34681	-0.10%	1.34%	0.57%	0.06%
AUDUSD	0.70288	0.15%	0.55%	1.06%	5.34%
NZDUSD	0.58865	0.13%	1.97%	3.24%	2.27%
USDJPY	156.552	-0.56%	-4.40%	-3.41%	-0.13%
USDCAD	1.40337	0.10%	-0.64%	-1.20%	2.28%
METALS					
XAUUSD	4063.75	0.51%	-0.34%	-2.43%	-5.93%
SILVER	58.193	0.99%	-0.36%	-6.20%	-18.34%
PLATIN	1658.6	-0.01%	1.62%	0.94%	-19.87%
INDICES					
S&P 500	7533.3	0.58%	1.62%	-0.05%	10.05%
DOW JONES	52746	0.50%	1.03%	-0.58%	9.74%
NASDAQ	28518	0.86%	1.71%	-3.97%	12.94%
NIKKEI	63330	-1.60%	-2.47%	-9.19%	25.81%
DAX	25865	0.92%	1.99%	0.18%	5.61%
ENERGY					
CRUDE OIL	79.84	-5.70%	-3.35%	16.47%	39.05%
BRENT OIL	83.518	-5.02%	-5.48%	16.01%	37.25%
NATURAL GAS	2.7743	0.99%	-0.49%	-14.51%	-24.73%
BONDS					
US 10Y	4.6990	0.0410	0.04%	0.23%	0.53%
DE 10Y	3.2036	0.0354	0.03%	0.33%	0.34%
JAPAN 10Y	2.8180	0.0194	0.05%	-0.02%	0.74%
UK 10Y	32.4500	0.0400	-0.20%	1.63%	5.29%
CHINA 10Y	6.8120	0.0040	-0.01%	0.06%	0.24%

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EURUSD

EUR/USD trades around 1.1528, extending its recovery after breaking above key resistance.

A weaker dollar following the Fed's rate decision, strong 0.4% Eurozone GDP growth, and easing Middle East tensions have supported the euro. The pair remains above its 50-day SMA, with Friday's US jobs report the next major catalyst.

The first resistance is positioned at 1.1560 while the support starts from 1.1500.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1680	1.1590	1.1560	1.1500	1.1470	1.1400

XAUUSD

Gold climbed above $4,050, recovering recent losses after President Trump said peace talks with Iran would resume, pushing oil prices lower and easing inflation concerns.

Attention now turns to a busy week of US labor data, led by Friday's Nonfarm Payrolls report. Markets currently price a 68% chance of a September Fed rate hike.

First resistance is seen at $4085, with initial support near $4020.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
4160	4120	4085	4020	3970	3900

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USDJPY

The yen strengthened toward 155 per dollar, extending its rally to around 5% over three sessions after Japan confirmed coordinated currency intervention with the US Treasury.

Officials said they remain ready to act again if needed, following the yen's slide to four-decade lows.

First resistance is seen at 157.30, with initial support near 155.30.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
160.00	158.60	157.30	155.30	153.80	151.50

BTCUSD

Bitcoin trades near $63,000, holding above $60,000 as buyers defend key support. Strategy's sale of 3,620 BTC challenged the company's long-standing "never sell" narrative, while weaker 1.5% US GDP growth added caution.

Heavy $60,000 put option positioning points to hedging against a deeper August pullback, with the price still below its 50-day EMA.

First resistance is seen at 63,500, with initial support near 62.000.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
65.900	64.700	63.500	62.000	61.200	60.000

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BRENT OIL

Brent traded near $85 as reports of recent US-Iran diplomacy and a possible Strait of Hormuz agreement weighed on prices.

Markets also looked ahead to key US economic data, while improving geopolitical sentiment reduced immediate supply concerns.

Resistance is seen at 85.00, while the nearest support stands at 81.80.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
90.00	87.80	85.00	81.80	80.00	78.00

NASDAQ

The Nasdaq-100 traded near 28,106, extending its rebound above 28,000 after a sharp correction. Microsoft jumped 16%, its biggest gain since 2008, on strong cloud revenue, lifting semiconductor shares and easing concerns over AI spending.

Amazon also advanced after earnings, while Apple and Meta declined. Softer GDP and cooler PCE inflation strengthened expectations for future Fed rate cuts.

Resistance stands at 28,800, while the nearest support is located at 28,200.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
$30.000	$29.400	$28.800	$28.200	$27.900	$27.500

USDCNH

USD/CNH traded near 6.7500, staying close to multi-month lows as a stronger daily PBOC fixing supported the yuan.

Expectations for Fed rate cuts later in 2026 also weighed on the dollar, while the narrow gap between onshore and offshore yuan suggested limited speculative activity and steady capital controls.

Resistance stands at 6.7650 while the nearest support is located at 6.7420.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
6.7940	6.7870	6.7650	6.7420	6.7270	6.7050

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