

# DAILY ANALYSIS

22 April 2026



## Economic Calendar

Time	Cur.	Event	Forecast	Previous
06:00	GBP	CPI (YoY) (Mar)	3.3%	3.0%
14:30	USD	Crude Oil Inventories	-1.000M	-0.913M

### The Ceasefire Buys Time

Treasury yields held near 4.3% on Wednesday, supported by resilient economic data and ongoing tension in the Middle East after planned U.S.–Iran talks were scrapped. Strong retail sales reinforced expectations that the Federal Reserve will keep rates steady, while Kevin Warsh signaled a firm, hawkish policy stance.

The dollar index stayed above 98.3, reflecting continued demand for safety as Tehran indicated the Strait of Hormuz would remain closed during U.S. naval operations, even as the ceasefire was extended to allow new proposals.

Equity futures moved higher, with the Dow Jones and S&P 500 up about 0.4% and the Nasdaq-100 rising 0.5%, as the ceasefire reduced immediate escalation risks. Attention now turns to earnings from Tesla, AT&T, Boeing, GE Vernova, and CME Group.

Japan's 10-year government bond yield held around 2.4%, with policymakers expected to leave rates unchanged while weighing the economic impact of higher energy costs and persistent external risks.

## Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
<b>CURRENCIES</b>					
EURUSD	1.17395	-0.03%	-0.51%	1.09%	-0.01%
GBPUSD	1.35071	0.00%	-0.40%	0.55%	0.35%
AUDUSD	0.71551	0.05%	-0.21%	2.06%	7.23%
NZDUSD	0.59056	0.21%	-0.14%	0.80%	2.60%
USDJPY	159.377	0.00%	0.24%	0.59%	1.68%
USDCAD	1.36605	-0.03%	-0.59%	-0.48%	-0.44%
<b>METALS</b>					
XAUUSD	4758.07	0.79%	-0.67%	7.94%	10.15%
SILVER	78.079	1.92%	-1.11%	12.94%	9.57%
PLATIN	2075.2	1.70%	-2.60%	11.35%	0.25%
<b>INDICES</b>					
S&P 500	7101.18	0.53%	1.11%	7.90%	3.74%
DOW JONES	49370	0.45%	1.87%	6.84%	2.72%
NASDAQ	26650	0.64%	1.70%	10.18%	5.55%
NIKKEI	59540	0.32%	2.42%	15.58%	18.28%
DAX	24220	-0.21%	0.64%	6.91%	-1.10%
<b>ENERGY</b>					
CRUDE OIL	89.215	-0.51%	-2.27%	1.23%	55.37%
BRENT OIL	98.183	-0.30%	3.43%	-1.76%	61.35%
NATURAL GAS	2.7127	0.58%	3.93%	-6.17%	-26.41%
<b>BONDS</b>					
US 10Y	4.2960	0.0030	0.01%	-0.06%	0.12%
DE 10Y	3.0108	0.0343	-0.02%	-0.01%	0.15%
JAPAN 10Y	2.4060	0.0196	0.00%	0.08%	0.33%
UK 10Y	4.8820	0.0520	0.16%	0.03%	0.40%
CHINA 10Y	1.7300	0.0230	-0.05%	-0.11%	-0.13%

## EURUSD



EUR/USD edged down toward 1.1750, with the dollar holding firm as uncertainty surrounding U.S.–Iran relations persisted. Although the ceasefire was extended to create room for further dialogue, warnings from Iran’s military signaled that risks remain far from resolved.

This uneasy balance between temporary restraint and unresolved conflict kept upward momentum in the pair limited.

The pair’s resistance is seen at 1.1800, while the closest support is positioned at 1.1680.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1880	1.1840	1.1800	1.1680	1.1640	1.1590

## XAUUSD



Gold continued to trade below \$4,750 per ounce, extending losses after a sharp decline in the previous session. Plans for renewed talks weakened after U.S. officials canceled a scheduled visit to Pakistan, while friction near the Strait of Hormuz remained unresolved.

Hawkish remarks from policymakers added further pressure, reinforcing a cautious tone across precious metals.

First resistance is seen at \$4840, with initial support near \$4715.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
5020	4960	4840	4715	4630	4580

## USDJPY



The Japanese yen hovered around 159.2 per dollar, remaining on the defensive as attention shifted to the Bank of Japan's upcoming policy decision. Interest rates are mostly expected to stay the same for now, though higher energy costs are likely to push inflation forecasts upward while weighing on growth expectations.

A firmer dollar following stalled negotiations also contributed to the currency's limited recovery.

Initial resistance stands at 159.70, while the first support is located at 159.00.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
161.30	160.50	159.70	159.00	158.60	157.80

## BTCUSD



Bitcoin traded near \$77,542 and continues its steady advance over recent weeks. Over the past month, prices have increased by approximately 9.36%, even though performance remains lower on a yearly basis.

Ongoing institutional accumulation and sustained inflows into spot ETFs have provided a solid foundation for the rally, while short-term price swings remain likely as the market digests recent gains.

Bitcoin's first resistance stands at 79,800, while support is at 75,400.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
85.000	83.600	79.800	75.400	73.700	70.500

## BRENT OIL



Brent crude jumped roughly 8% to trade around \$103 per barrel, reversing last week's decline after Washington announced a blockade targeting vessels connected to Iranian ports. The restrictions, set to begin at 10 a.m. Eastern Time, followed unsuccessful negotiations in Pakistan.

Tehran's demands (including broader regional concessions and access to frozen assets) highlighted the depth of the standoff, keeping supply concerns firmly in focus.

Brent's resistance is seen at 99.20 with initial support near 96.80.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
103.40	101.00	99.20	96.80	94.50	92.70

## NASDAQ



The US Tech 100 continued to trade above 26,000, holding close to record territory as enthusiasm around artificial intelligence remained the primary driver. Gains have been persistent, supported by strong earnings from major technology firms.

Technical indicators suggest the rally is becoming crowded, increasing the likelihood of a pause or consolidation after the recent surge.

Nasdaq's resistance is seen at 26.900, with initial support near 26.400.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$27.700	\$27.320	\$26.900	\$26.400	\$26.120	\$25.750

## USD/CNH



The offshore yuan strengthened slightly to around 6.82 per dollar, recovering part of its earlier losses as corporate demand for yuan-based settlements increased. Ongoing discussions between Ecobank and the Bank of China on direct local-currency settlement frameworks highlight a broader shift toward diversified payment channels across Africa and Asia.

A firmer dollar following stalled negotiations limited the currency's advance, even as the ceasefire extension kept diplomatic channels open.

USD/CNH is testing resistance at 6.8330, with support positioned near 6.8120.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
6.9020	6.8650	6.8330	6.8120	6.7800	6.7500

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