DAILY ANALYSIS

05 August 2026

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Economic Calendar

Time	Cur.	Event	Forecast	Previous
12:15	USD	ADP Nonfarm Employment Change (Jul)	68k	98k
13:45	USD	S&P Global Services PMI (Jul)	53.6	51.2
14:00	USD	ISM Non-Manufacturing Prices (Jul)		67.2
14:00	USD	ISM Non-Manufacturing PMI (Jul)	54.5	54.0
14:30	USD	Crude Oil Inventories	-1.500M	-7.167M
20:30	USD	U.S. President Trump Speaks		

Bonds Welcome Lower Oil

The 10-year Treasury yield fell to around 4.6%, marking a third straight decline. Reports of a possible US-Iran agreement pushed oil lower, reducing September Fed hike odds to 57% from 67%. Markets now await the ADP employment report.

The Dollar Index remained below 100 as lower oil prices eased inflation concerns. Qatar prepared an interim proposal for a Strait of Hormuz agreement, while Treasury Secretary Scott Bessent said a deal could come by midweek. The dollar also stayed under pressure against the yen following renewed intervention warnings.

US stock futures were little changed after all three major indexes closed at record highs. SpaceX fell 7% despite beating revenue estimates in its public earnings debut, while AMD dropped 9% after a modest beat. Attention now turns to results from Eli Lilly, Disney, and Uber.

Japan's 10-year yield slipped to around 2.82% as falling oil prices reduced inflation concerns following reports of progress toward a Strait of Hormuz agreement. Expectations of another BOJ rate hike continued to support yields.

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Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
CURRENCIES					
EURUSD	1.15332	0.02%	0.57%	0.80%	-1.77%
GBPUSD	1.34539	0.02%	0.62%	0.46%	-0.04%
AUDUSD	0.70467	0.00%	1.31%	1.31%	5.60%
NZDUSD	0.58702	-0.40%	1.30%	2.95%	1.98%
USDJPY	157.664	-0.04%	-3.51%	-2.73%	0.58%
USDCAD	1.40737	0.08%	0.19%	-0.92%	2.57%
METALS					
XAUUSD	4137.01	1.45%	1.75%	-0.67%	-4.23%
SILVER	60.779	2.14%	5.49%	-2.03%	-14.71%
PLATIN	1765.8	0.56%	10.20%	7.47%	-14.70%
INDICES					
S&P 500	7766.5	0.39%	6.16%	3.04%	13.45%
DOW JONES	54323	0.44%	5.29%	2.39%	13.02%
NASDAQ	29787	0.18%	9.54%	0.30%	17.97%
NIKKEI	66190	3.49%	7.74%	-5.09%	31.49%
DAX	26394	0.73%	3.67%	2.23%	7.77%
ENERGY					
CRUDE OIL	75.26	-0.67%	-10.89%	9.79%	31.07%
BRENT OIL	78.997	-0.46%	-10.32%	9.73%	29.82%
NATURAL GAS	2.6964	0.54%	-0.94%	-16.91%	-26.85%
BONDS					
US 10Y	4.6110	0.0080	-0.07%	0.14%	0.44%
DE 10Y	3.1163	0.0356	0.01%	0.17%	0.25%
JAPAN 10Y	2.8200	0.0391	0.07%	-0.02%	0.75%
UK 10Y	32.0500	0.2200	-0.27%	1.14%	4.89%
CHINA 10Y	6.8290	0.0120	0.06%	0.13%	0.26%

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EURUSD

EUR/USD traded slightly above 1.15, its highest level since 16 June, as easing Middle East tensions weighed on the dollar.

Oil prices fell on expectations of a US-Iran agreement, reducing inflation concerns, while Treasury Secretary Scott Bessent said a Strait of Hormuz deal could be reached by midweek.

Stronger eurozone data, including 0.4% Q2 GDP growth and 2.9% July inflation, reinforced expectations of an ECB rate hike in September.

The first resistance is positioned at 1.1560 while the support starts from 1.1510.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1610	1.1580	1.1560	1.1510	1.1470	1.1420

XAUUSD

Gold climbed above $4,100 an ounce, rising for a third straight session as traders assessed progress toward a Strait of Hormuz agreement.

Qatar prepared an interim proposal, while talks between Washington and Tehran pushed oil prices lower and reduced expectations for further Fed tightening. Markets now price a 57% chance of a September rate hike, down from 67%, with ADP payrolls due later today.

Chinese gold ETFs also continued to attract inflows above $4,000.

First resistance is seen at $4180, with initial support near $4080.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
4250	4220	4180	4080	4000	3950

USDJPY

The yen traded around 157.5 per dollar, pausing after a strong three-session rally.

Treasury Secretary Scott Bessent reaffirmed US support following coordinated intervention with Japan, while BOJ data showed Tokyo spent ¥5.33 trillion on Friday after a record ¥8.45 trillion the previous day.

Japan's real wages rose for a sixth consecutive month, strengthening expectations of further BOJ tightening.

First resistance is seen at 158.60, with initial support near 157.00.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
162.10	160.00	158.60	157.00	155.80	153.50

BTCUSD

Bitcoin traded near $64,339, up 0.45% and holding above $63,000 support as easing Middle East tensions and renewed ETF inflows supported sentiment.

Optimism over a Strait of Hormuz agreement lifted broader risk assets, while selling pressure from Strategy eased and spot ETF flows turned positive. RSI remained close to 50, pointing to ongoing accumulation.

First resistance is seen at 64,700, with initial support near 63.000.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
67.100	65.900	64.700	63.000	61.500	60.000

BRENT OIL

Brent fell below $79, extending losses for a third session and bringing weekly declines to more than 10%.

Expectations of a Strait of Hormuz agreement strengthened after Qatar prepared an interim proposal and Washington and Tehran reported progress. President Trump paused military action to allow diplomacy, while Iran advanced shipping talks with Oman and Saudi-Houthi negotiations also continued.

Resistance is seen at 81.20, while the nearest support stands at 77.50.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
85.30	83.00	81.20	77.50	74.80	72.00

NASDAQ

The Nasdaq-100 climbed 3.32% to 29,733.16, led by another strong rally in semiconductor stocks.

AMD gained 9%, Intel rose 11.3%, and Broadcom advanced 7.5%. Lower oil prices on easing Middle East tensions also supported sentiment, while the Fed's decision to keep rates at 3.50%-3.75% removed near-term policy uncertainty.

Resistance stands at 30,000, while the nearest support is located at 29,500.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
$30.500	$30.250	$30.000	$29.500	$29.200	$29.000

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USDCNH

USD/CNY traded near 6.7536, with the yuan remaining close to yearly highs against the dollar.

The PBOC set its daily fixing at 6.7917, while stronger Chinese exports, up 15% year-on-year, and a weaker dollar supported the currency. Expectations of further PBOC easing, however, may limit additional gains.

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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