

# DAILY ANALYSIS

12 June 2026



## Economic Calendar

Time	Cur.	Event	Forecast	Previous
All Day	RUB	Russia – Russia Day		
09:00	EUR	German CPI (MoM) (May)	-0.2%	0.6%
09:00	GBP	GDP (MoM) (Apr)	-0.1%	0.3%

### Focus is on SpaceX IPO and CB Outlooks

U.S. stock futures stabilized on Friday as market participants pivoted attention to the landmark public debut of SpaceX. The aerospace giant is projected to launch what could become the largest initial public offering in history, with an estimated valuation nearing \$1.8 trillion. Broader investor sentiment remains supported by recent strong gains across major equity indexes and encouraging diplomatic signals pointing to progress in U.S.–Iran negotiations.

In fixed income, Japan's 10-year government bond yield dropped to a one-week low near 2.65% ahead of next week's highly anticipated Bank of Japan monetary policy meeting. Economists broadly forecast a 25 basis point rate increase to 1%, driven by sticky domestic inflation and currency weakness. Notably, BOJ Governor Kazuo Ueda will miss the policy proceedings due to hospitalization. The debt market found additional support from declining U.S. Treasury yields and a cooling geopolitical risk premium.

The U.S. 10-year Treasury yield hovered near 4.47% following a sharp drop in the prior session. Optimism over a breakthrough in Washington–Tehran relations pulled crude prices lower, directly reducing immediate inflation anxieties and relieving pressure on sovereign bonds. Nevertheless, the macroeconomic backdrop remains complicated; recent data revealed that U.S. producer inflation accelerated at its fastest annual clip since late 2022, ensuring the Federal Reserve keeps future interest rate hikes on the table.

The U.S. dollar index edged up to approximately 99.8, though it stayed capped as safe-haven demand receded. Sentiment turned positive after President Trump hinted that a peace accord could be finalized within days, pushing energy markets lower. However, underlying dollar support persists after May producer prices jumped 6.5% year-on-year, reinforcing expectations of a hawkish Fed bias.

## Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
<b>CURRENCIES</b>					
EURUSD	1.15473	0.10%	-0.54%	-1.63%	-1.65%
GBPUSD	1.33789	0.08%	-0.34%	-1.19%	-0.60%
AUDUSD	0.70027	0.06%	-1.84%	-3.28%	4.95%
NZDUSD	0.57988	0.03%	-1.20%	-2.59%	0.74%
USDJPY	160.517	-0.02%	0.31%	1.84%	2.40%
USDCAD	1.39379	-0.04%	0.21%	1.76%	1.58%
<b>METALS</b>					
XAUUSD	4064.29	-0.19%	-9.18%	-13.80%	-5.92%
SILVER	63.379	-0.03%	-14.16%	-26.77%	-11.06%
PLATIN	1664.2	-1.58%	-12.41%	-21.47%	-19.60%
<b>INDICES</b>					
S&P 500	7285.83	0.26%	-3.94%	-1.56%	6.43%
DOW JONES	49919	-1.87%	-3.19%	0.32%	3.86%
NASDAQ	28573	0.23%	-6.03%	-1.69%	13.16%
NIKKEI	63930	-0.39%	-5.25%	1.89%	27.00%
DAX	24024	-0.71%	-3.69%	0.29%	-1.90%
<b>ENERGY</b>					
CRUDE OIL	91.746	1.91%	-1.39%	-10.21%	59.78%
BRENT OIL	94.651	1.67%	-0.40%	-12.17%	55.55%
NATURAL GAS	3.1911	0.19%	-4.34%	12.24%	-13.43%
<b>BONDS</b>					
US 10Y	4.5580	0.0010	0.08%	0.10%	0.39%
DE 10Y	3.0686	0.0119	0.03%	0.03%	0.21%
JAPAN 10Y	2.6860	0.0036	0.01%	0.14%	0.61%
UK 10Y	4.9290	0.0160	-0.01%	-0.09%	0.45%
CHINA 10Y	1.7450	0.0030	0.03%	-0.06%	-0.12%

## EURUSD



The euro traded near 1.1570, hitting its lowest point since early April following an expected 25 basis point ECB interest rate hike. Citing energy constraints and Iran-related geopolitical risks, the central bank lifted inflation expectations while trimming economic growth projections. Meanwhile, the dollar maintained its strength, sustained by ongoing Middle East instability.

The first resistance level stands at 1.1600, while initial support is located at 1.1540.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1685	1.1635	1.1600	1.1540	1.1500	1.1470

## XAUUSD



Gold maintained its footing near \$4,200 on Friday following a 3% rebound in the previous session, strengthened by cooler inflation fears as optimism grew over a potential U.S.–Iran peace accord. President Trump hinted at a near-term breakthrough, with reports suggesting Iranian compliance. Meanwhile, recent ECB rate hikes and hot U.S. inflation data kept Federal Reserve tightening expectations firmly intact.

First resistance is seen at \$4220, with initial support near \$4150.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
4370	4300	4220	4150	4060	3950

## USDJPY



The Japanese yen eased to around 160.2 per dollar on Friday, retracing earlier gains as market participants adjusted positions ahead of next week's critical Bank of Japan policy decision. The central bank is broadly projected to lift interest rates by 25 basis points to 1%, its highest level since 1995. However, Governor Kazuo Ueda will miss the meeting due to hospitalization. The yen previously caught a bid from broad dollar weakness on U.S.–Iran peace hopes, but Japan's heavy reliance on Middle Eastern energy imports leaves it highly sensitive

to regional geopolitical risks.

Initial resistance stands at 160.90, while the first support is at 159.40.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
162.40	161.50	160.90	159.40	158.30	157.50

## BTCUSD



Bitcoin traded near \$63,630 after recovering from recent drops, consolidating within a \$61,139–\$63,964 window. Momentum metrics display initial improvement as buyers re-enter, though underlying trend dynamics remain mixed. Key resistance looms around \$63,000–\$65,000, while support anchors near \$61,000. Imminent options expiry activity and inflation-driven market sentiment continue to dictate immediate direction.

Bitcoin's first resistance stands at 63,800, while support is at 61,000.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
70.000	66.000	63.800	61.000	58.700	57.000

## BRENT OIL



Brent crude tumbled to approximately \$89 per barrel, hitting a nearly two-month low following reports of a potential U.S.–Iran peace accord. President Trump indicated an agreement could be imminent, which would ease shipping frictions around the crucial Strait of Hormuz. Nevertheless, underlying market uncertainty persists as infrastructure damage, lingering maritime security risks, and prolonged production halts could delay a full recovery in global oil supplies.

Resistance is seen at 90.00, while the nearest support stands at 87.50.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
94.50	92.30	90.00	87.50	86.00	84.60

## NASDAQ



The Nasdaq-100 jumped 3.29% to 29,446.18 as cooling Middle East frictions lifted risk appetite, sparking a major technology rebound. Dropping crude costs and lower Treasury yields fueled the advance despite lingering inflation anxieties. Overhead resistance looms near 29,500–29,600, while support remains solid around 28,730, with macroeconomic and geopolitical developments driving immediate market direction.

Resistance stands at 29,600, while the nearest support is located at 29,100.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$30.200	\$29.900	\$29.600	\$29.100	\$28.730	\$28.450

## USDCNH



The offshore yuan appreciated toward 6.76 per dollar as investors evaluated China's latest inflation prints. May consumer prices rose 1.2% year-on-year, missing forecasts and signaling soft domestic consumption. However, producer inflation accelerated to 3.9%, reaching a level not seen since 2022, influenced by elevated energy and commodity inputs. While escalating Middle East tensions worsen energy costs, tepid consumer demand prevents a wider inflationary pass-through, leaving corporate profit margins vulnerable to upstream pricing pressures.

USD/CNH is testing resistance at 6.8050, with support positioned near 6.7450.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
6.9000	6.8520	6.8050	6.7450	6.7100	6.6800

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