

DAILY ANALYSIS

23 June 2026



Time	Cur.	Event	Forecast	Previous
13:45	USD	S&P Global Services PMI (Jun)	51.0	50.7
13:45	USD	S&P Global Manufacturing PMI (Jun)	54.6	55.1

Hormuz is Claimed to Stay Open

Trump said US-Iran negotiations are moving in a positive direction but warned that Washington is prepared to act if Tehran fails to meet its commitments. He also stated that the Strait of Hormuz remains open under US control and reiterated that Iran will not be allowed to obtain nuclear weapons.

US stock futures edged lower after a mixed Wall Street session. The Dow finished higher, while the Nasdaq and S&P 500 declined as selling in major technology stocks continued. Micron stood out with gains following its partnership announcement with Anthropic.

The dollar remained near a one-year high as expectations for a possible September Fed rate increase stayed intact. Attention now turns to the PCE inflation report, while progress in US-Iran talks and a temporary permit for Iranian oil exports improved the outlook for global supply.

The US 10-year Treasury yield held near 4.5% after its recent climb. Fed policy expectations and inflation concerns continued to support yields, with the upcoming PCE report expected to provide the next major test for rate expectations.

Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
CURRENCIES					
EURUSD	1.14284	0.00%	-1.55%	-1.85%	-2.66%
GBPUSD	1.3245	-0.03%	-1.35%	-1.93%	-1.60%
AUDUSD	0.69756	-0.37%	-1.30%	-2.75%	4.54%
NZDUSD	0.57014	-0.22%	-2.24%	-2.91%	-0.95%
USDJPY	161.556	-0.01%	0.71%	1.67%	3.07%
USDCAD	1.41666	0.05%	1.22%	2.64%	3.25%
METALS					
XAUUSD	4140.3	-1.22%	-4.41%	-9.39%	-4.16%
SILVER	63.163	-2.90%	-9.79%	-19.10%	-11.36%
PLATIN	1642.6	-1.77%	-9.48%	-15.83%	-20.65%
INDICES					
S&P 500	7438.18	-0.46%	-0.97%	-1.08%	8.66%
DOW JONES	51683	-0.06%	-0.61%	2.42%	7.53%
NASDAQ	30053	-0.97%	0.28%	0.17%	19.02%
NIKKEI	71487	-1.20%	3.00%	9.71%	42.01%
DAX	25010	-0.52%	0.40%	-1.49%	2.12%
ENERGY					
CRUDE OIL	73.652	-0.28%	-3.15%	-21.56%	28.27%
BRENT OIL	77.548	-0.45%	-1.79%	-19.78%	27.44%
NATURAL GAS	3.2308	-0.68%	-0.25%	7.34%	-12.35%
BONDS					
US 10Y	4.4980	0.0180	0.05%	0.01%	0.33%
DE 10Y	2.9514	0.0329	0.00%	0.00%	0.09%
JAPAN 10Y	2.6730	0.0050	0.02%	-0.02%	0.60%
UK 10Y	33.4300	2.4600	2.50%	0.49%	6.27%
CHINA 10Y	6.8530	0.0030	-0.02%	-0.18%	0.28%

EURUSD



The euro slipped to \$1.143, its lowest level since mid-March, as a stronger dollar outweighed progress in US-Iran negotiations. The talks continued to support hopes of improved energy flows, while attention in Europe shifted to political developments in the UK following Keir Starmer's resignation.

The ECB's recent rate increase to 2.25% has also kept expectations of further tightening in place.

The first resistance level stands at 1.1450, while initial support is located at 1.1400.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1540	1.1500	1.1450	1.1400	1.1350	1.1310

XAUUSD



Gold fell below \$4,150 per ounce as expectations for additional Federal Reserve tightening continued to weigh on bullion.

Deutsche Bank and Bank of America now forecast a September rate increase, while attention turns to the upcoming PCE inflation report for further policy clues.

A US permit allowing Iranian oil exports and rising traffic through the Strait of Hormuz pointed to improving global energy supply conditions.

First resistance is seen at \$4,180, with initial support near \$4,100.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
4300	4240	4180	4100	4050	4000

USDJPY



The yen traded near 161.5 per dollar, remaining close to its weakest level since 1986. Japanese officials reiterated their commitment to currency stability and coordination with the United States, but verbal intervention had little impact.

Despite the Bank of Japan's recent rate increase, the wide yield gap with the US continues to support dollar demand.

First resistance is seen at 162.00, with initial support near the 161.00 level.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
163.00	162.40	162.00	161.00	160.50	160.00

BTCUSD



Bitcoin continued to consolidate after its recent correction, with buyers defending the \$60,000 area while upside momentum remained capped below \$66,500.

Price action suggests the market is stabilizing, with a break above resistance potentially opening the way toward \$70,000. A loss of support could expose the cryptocurrency to another wave of selling.

First resistance is seen at 64.600, with initial support near the 62.000 level.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
70.000	66.800	64.600	62.000	60.900	59.500

BRENT OIL



Brent crude held near \$78 per barrel after recent losses as traders assessed progress in US-Iran negotiations.

A temporary US authorization allowing Iranian oil exports increased expectations of additional supply, while shipping activity through the Strait of Hormuz continued to recover.

Discussions surrounding Iran's nuclear program remain unresolved despite signs of diplomatic progress.

Resistance is seen at 80.00, while the nearest support stands at 76.20.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
90.00	85.00	80.00	76.20	71.00	64.00

NASDAQ



The US 100 remained in a consolidation phase as higher Treasury yields continued to challenge technology shares.

Recent geopolitical developments provided some support, but attention remains focused on upcoming US inflation data and Federal Reserve policy expectations.

The index continues to trade within a defined range as participants wait for a clearer catalyst.

Resistance stands at 30,300, while the nearest support is located at 29,700.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$30.900	\$30.700	\$30.300	\$29.700	\$29.200	\$28.750

USDCNH



The offshore yuan traded near 6.78 per dollar, hovering close to a two-week low. The People's Bank of China left lending rates unchanged for a thirteenth consecutive month while allowing a softer daily fixing, signaling tolerance for gradual currency weakness.

Seasonal demand for foreign currency linked to dividend payments in Hong Kong also contributed to the move.

Resistance stands at 6.8050 while the nearest support is located at 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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