DAILY ANALYSIS

10 August 2026

Economic Calendar

Time	Cur.	Event	Forecast	Previous
All Day	SGD	Singapore – National Day (Holiday)		
All Day	ZAR	South Africa – Women's Day (Holiday)		

Oil Clouds Wall Street

US stock futures edged lower as higher oil prices revived inflation concerns. After July payrolls unexpectedly fell 23,000, September Fed hike odds dropped to 44% from 67%. Focus now shifts to US inflation data and earnings from Applied Materials, Cisco, and CoreWeave.

The 10-year Treasury yield held near 4.66% after weak payrolls and downward revisions reduced expectations for Fed tightening. September hike odds fell to 44%, with upcoming inflation data set to guide the next move.

Japan's 10-year yield rose above 2.8% for a second session as higher oil prices added to inflation concerns. The BOJ flagged growing price risks, while one policymaker suggested rate hikes could accelerate. Japan's current account surplus also narrowed in June as higher crude import costs offset strong AI-related electronics exports.

The Dollar Index hovered near 99.6 after weak July payrolls and sharp downward revisions weighed on the currency. September hike odds dropped to 44% from 67%, while uncertainty over Iran and the Strait of Hormuz remained in focus.

Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
CURRENCIES					
EURUSD	1.15544	-0.04%	0.40%	1.52%	-1.59%
GBPUSD	1.34881	-0.03%	0.41%	1.05%	0.21%
AUDUSD	0.70636	-0.07%	0.91%	2.10%	5.86%
NZDUSD	0.58843	-0.18%	0.21%	2.34%	2.23%
USDJPY	158.251	0.31%	0.68%	-2.57%	0.96%
USDCAD	1.39508	0.08%	-0.68%	-1.44%	1.68%
METALS					
XAUUSD	4320.28	-0.53%	6.54%	7.96%	0.01%
SILVER	63.472	-0.11%	10.03%	10.16%	-10.93%
PLATIN	1752.4	-0.41%	7.75%	8.60%	-15.34%
INDICES					
S&P 500	7756.77	-0.01%	2.06%	3.21%	13.31%
DOW JONES	53957	-0.15%	1.46%	2.78%	12.26%
NASDAQ	29744	0.07%	3.36%	1.64%	17.80%
NIKKEI	67015	2.15%	5.11%	-0.34%	33.13%
DAX	26351	0.12%	1.34%	4.92%	7.60%
ENERGY					
CRUDE OIL	78.812	0.81%	-1.90%	0.86%	37.25%
BRENT OIL	84.429	1.05%	0.79%	1.36%	38.75%
NATURAL GAS	2.7252	2.37%	-2.01%	-5.93%	-26.07%
BONDS					
US 10Y	4.6630	0.0120	-0.02%	0.04%	0.49%
DE 10Y	3.1295	0.0038	-0.07%	0.04%	0.27%
JAPAN 10Y	2.8090	0.0072	-0.02%	0.02%	0.74%
UK 10Y	32.2400	0.1400	-0.21%	0.78%	5.08%
CHINA 10Y	6.7800	0.0110	-0.03%	0.02%	0.21%

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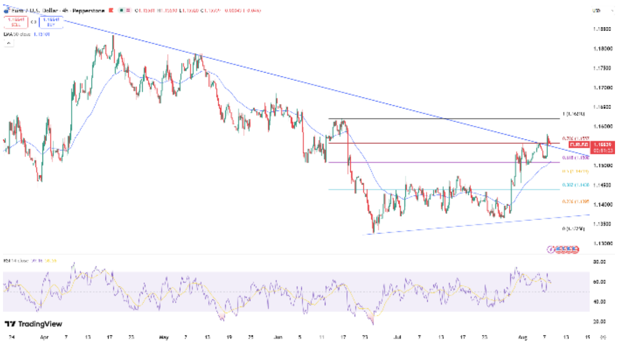
EURUSD



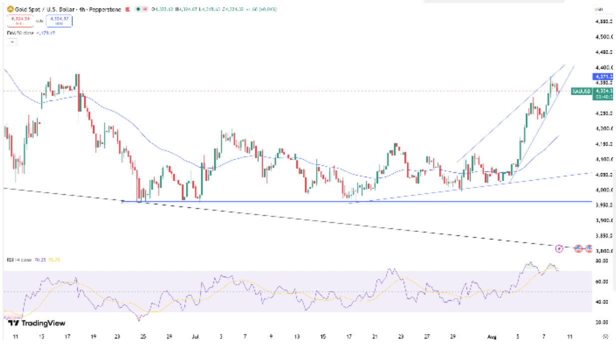
EUR/USD trades cautiously bullish, pausing below key resistance after recent multi-week highs. Weak US NFP and ISM data pressured the dollar, while strong Eurozone GDP kept the euro resilient despite the ECB's pause.

Hormuz-related tensions add short-term volatility. Price holds above its shorter-term moving average but below the longer-term one; momentum indicators reflect bullish conditions without being overbought. Focus is on Wednesday's US CPI report.

The first resistance is positioned at 1.1570 while the support starts from 1.1500.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1610	1.1590	1.1570	1.1500	1.1470	1.1420

XAUUSD



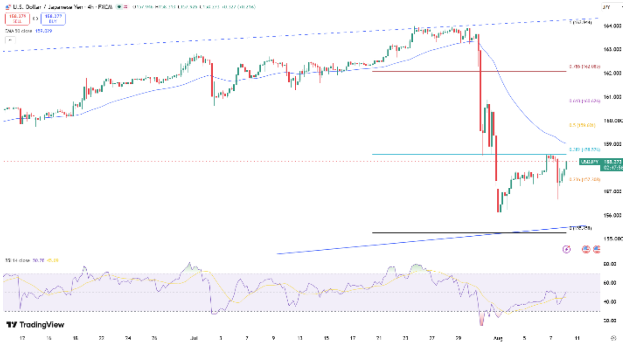
Gold held above $4,300/oz, retaining last week's 7%+ surge, after a surprise US labor contraction reduced Fed hike expectations.

July payrolls fell 23K, following a downward-revised June gain, missing forecasts of 80K. September hike odds fell to 44% from 67%. Gold sustained gains despite rising oil with Hormuz uncertainty; Iran denied direct US talks despite Washington's claims of an imminent deal.

First resistance is seen at $4350, with initial support near $4280.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
4460	4400	4350	4280	4200	4150

USDJPY



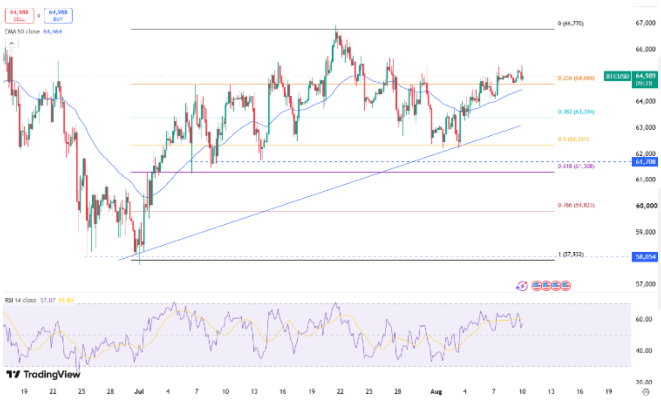
The yen weakened past 158 per dollar, reversing Friday's gains as joint Tokyo-Washington intervention failed to sustain the rally amid persistent structural pressure.

Wide rate differentials, fiscal concerns, and high energy costs kept the yen weighed down. Japan's current account surplus narrowed in June as AI-electronics export strength was offset by higher crude import costs. The BOJ flagged rising inflation risks in its July summary, with one member suggesting faster rate hikes ahead.

First resistance is seen at 158.60, with initial support near 157.30.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
162.10	160.00	158.60	157.30	155.80	153.50

BTCUSD



Bitcoin trades near $64,989, up 0.10% in 24 hours, up 3%+ weekly as total crypto market cap nears $2.9 trillion.

Gains driven by $853.5M in US spot ETF inflows (led by BlackRock's IBIT) and weak US jobs data fueling Fed rate-cut hopes.

Sentiment held steady despite a $116M Coldcard wallet hack; markets watch the CLARITY Act vote.

First resistance is seen at 65,900, with initial support near 64.100.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
68.500	67.100	65.900	64.100	62.500	60.000

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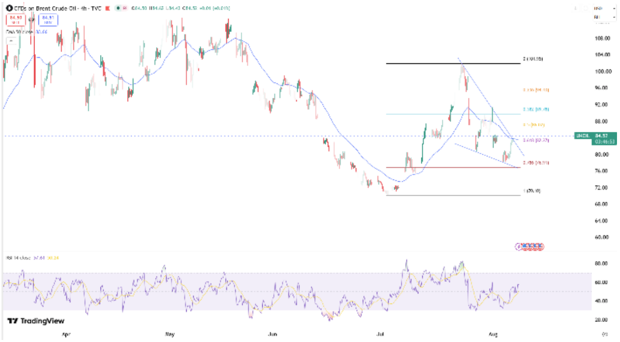
BRENT OIL



Brent rose above $84/barrel, extending gains for a third session.

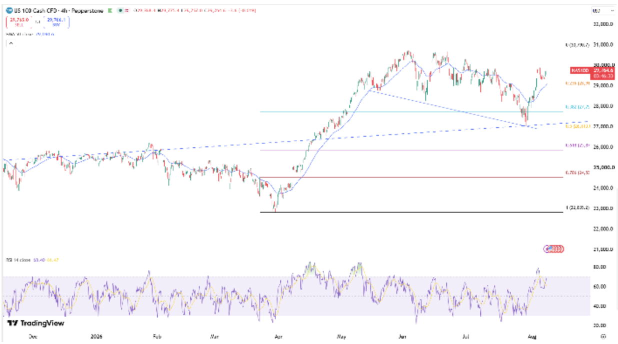
Iran said Oman talks were nearing agreement but warned reopening wouldn't be immediate, rejecting direct US talks over alleged peace-deal breaches while demanding an end to the naval blockade, sanctions relief, and war damage compensation.

Trump signaled patience. Houthis claimed an attack on Saudi Arabia's Jazan refinery; an ADNOC tanker was also hit in Hormuz.

Resistance is seen at 85.00, while the nearest support stands at 82.50.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
88.10	86.70	85.00	82.50	80.00	78.20

NASDAQ



Nasdaq-100 trades near 29,750, stabilizing after a 1.19% relief rally as it tests a post-earnings consolidation breakout.

Weak July jobs data lifted Fed rate-cut hopes, while disappointing AMD and SpaceX earnings on heavy AI capex weighed on sentiment.

Focus turns to CoreWeave, Super Micro earnings, and Wednesday's US CPI release.

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
$30.700	$30.300	$30.000	$29.500	$29.200	$29.000

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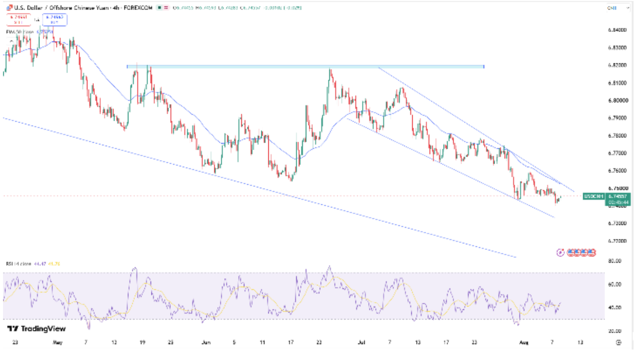
USDCNH



USD/CNY trades near 6.7476, close to a multi-month low as the yuan strengthens against a broadly correcting dollar.

Chinese exporters' USD conversions and strong AI-hardware export demand support the yuan, while the PBOC guided its daily fix lower, validating the move. Soft US NFP data pressured the dollar amid rising Fed rate-cut bets.

Focus is on Chinese trade data and Wednesday's US CPI.

Resistance stands at 6.7550 while the nearest support is located at 6.7400.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
6.7940	6.7720	6.7550	6.7400	6.7270	6.7050

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