DAILY ANALYSIS

11 September 2026

Economic Calendar

Time	Cur.	Event	Actual	Forecast	Previous
06:00	GBP	GDP (MoM) (Jul)	0.04%	0.0%	0.3%
12:30	USD	CPI (MoM) (Aug)		0.4%	0.1%
12:30	USD	CPI (YoY) (Aug)		3.4%	3.4%
12:30	USD	Core CPI (MoM) (Aug)		0.2%	0.2%

CPI Holds the Next Card

US stock futures were little changed Friday after the Dow, S&P 500 and Nasdaq fell for a fourth straight session on higher oil and Treasury yields. August CPI is next after stronger producer inflation, driven by Iran war energy costs, pushed Fed hike odds to 71%. Oracle gained more than 4% after hours on strong earnings, while Adobe fell over 2% on weak guidance.

The dollar stayed above 99 before CPI, supported by stronger Fed hike expectations and rising Treasury yields. Oil surged past $100 as the US-Iran conflict showed no signs of easing, raising the risk of prolonged supply disruptions and further inflation pressure.

The US 10-year yield reached 4.97%, its highest since 2023, after a $5.2 billion Treasury buyback fell short of the $6 billion cap. Hot August PPI and oil above $100 added to the selloff, reinforcing the 71% probability of a Fed hike.

Japan's 10-year yield climbed to 2.99%, near 30-year highs, tracking the US bond selloff as higher oil added another inflation risk. Japanese PPI rose 7.6%, while manufacturer sentiment reached its strongest since Q4 2021, reinforcing BOJ hike expectations after Masu signaled further tightening.

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Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
CURRENCIES					
EURUSD	1.16098	-0.02%	-0.04%	0.73%	-1.11%
GBPUSD	1.35148	0.02%	-0.06%	0.15%	0.41%
AUDUSD	0.71712	0.19%	-0.46%	1.54%	7.47%
NZDUSD	0.583	0.57%	-0.87%	-0.51%	1.29%
USDJPY	154.102	-0.21%	-1.38%	-3.34%	-1.69%
USDCAD	1.38406	0.05%	0.02%	-0.72%	0.87%
METALS					
XAUUSD	4356.66	0.91%	-1.71%	-1.18%	0.85%
SILVER	64.159	0.96%	-2.77%	-1.78%	-9.97%
PLATIN	1802.8	0.09%	-1.27%	1.89%	-12.91%
INDICES					
S&P 500	7620.28	0.38%	-1.27%	-1.65%	11.32%
DOW JONES	52276	0.41%	-2.13%	-2.78%	8.76%
NASDAQ	29221	0.40%	-1.09%	-1.75%	15.73%
NIKKEI	63950	-2.02%	-1.65%	-5.29%	27.04%
DAX	25436	0.30%	-2.34%	-3.40%	3.86%
ENERGY					
CRUDE OIL	100.882	-1.56%	10.28%	21.15%	75.69%
BRENT OIL	105.681	-1.81%	9.76%	18.77%	73.68%
NATURAL GAS	2.8159	-0.64%	-5.35%	0.42%	-23.61%
BONDS					
US 10Y	4.9510	0.0180	0.16%	0.25%	0.78%
DE 10Y	3.5067	0.0104	0.17%	0.35%	0.64%
JAPAN 10Y	2.9900	0.0740	0.08%	0.14%	0.92%
UK 10Y	31.8700	0.1400	0.12%	-0.56%	4.71%
CHINA 10Y	6.9670	0.0090	0.01%	0.17%	0.40%

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EURUSD

The euro slipped toward 1.16 after the ECB delivered its second hike since the US-Iran war began and raised its inflation and growth forecasts.

Brent climbed to $105 and European gas reached a 3.5-year high, adding to energy-driven price pressure as another ECB increase is priced in by December. The dollar held firm after strong US PPI pushed Fed hike odds above 70%.

The first resistance stands at 1.1640, while initial support is at 1.1560.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1710	1.1680	1.1640	1.1560	1.1530	1.1500

XAUUSD

Gold traded near $4,400 an ounce after falling around 2%, with CPI next in line to test Fed hike expectations after hotter PPI lifted the odds to 71%.

Oil gains linked to the US-Iran conflict and higher Treasury yields following a weak buyback added pressure. Bullion is heading for a third straight weekly decline, down more than 2%.

The first resistance stands at $4,400, while initial support is at $4,300.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
4500	4470	4400	4300	4260	4200

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USDJPY

The yen weakened past 154 per dollar, retreating from near seven-month highs as US PPI strengthened the dollar and raised Fed hike bets.

Surging oil prices during the US-Iran war added inflation pressure, though strong Japanese PPI and improved manufacturer sentiment kept BOJ tightening expectations intact.

The yen is still up more than 3% this month, supported by rate bets, carry trade unwinding and capital repatriation.

First resistance is seen at 155.00, with initial support near 153.80.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
157.20	156.00	155.00	153.80	151.50	150.00

BTCUSD

Bitcoin traded near $76,811 after touching an intraday low of $76,676, as oil above $100 and surging US Treasury yields strengthened expectations for a Fed hike.

Strong PPI and today’s CPI release have pushed hike odds to 60–76%, weighing on crypto despite $3.8 billion of spot Bitcoin ETF inflows over the past three weeks.

The first resistance stands at $78,500, while initial support is at $75,500.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
82.000	80.200	78.500	75.500	72.500	70.000

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BRENT OIL

Brent climbed above $108, up around 12% this week and heading for its biggest weekly gain since mid-July as the US-Iran conflict intensified.

Officials reportedly warned Trump that the war could last through his term, while Iran signaled its intention to keep fighting and claimed to have rebuilt its missile capacity.

US strikes on tankers and Iranian missile attacks on US assets added to the escalation.

The first resistance stands at $110.00, while initial support is at $107.00.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
115.10	112.70	110.00	107.00	105.40	103.50

NASDAQ

The Nasdaq 100 fell 1.08% to 29,103.51, extending its losing streak to four sessions as oil above $100 and Treasury yields at multiyear highs pressured tech and growth stocks.

The first resistance stands at 29,250, while initial support is at 28,850.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
$29.800	$29.500	$29.250	$28,850	$28,500	$28,300

USDCNH

USD/CNY traded near 6.7112, close to a nearly one-year low, as the yuan held firm despite surging US Treasury yields that typically support the dollar.

The PBOC set its reference rate at 6.7743, balancing import inflation against export competitiveness.

The first resistance stands at 6.7170, while initial support is at 6.7000.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
6.7450	6.7320	6.7170	6.7000	6.6930	6.6850

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