

# DAILY ANALYSIS

13 February 2026



## Economic Calendar

Time	Cur.	Event	Forecast	Previous
13:30	USD	U.S. Consumer Price Index (CPI) MoM (MoM) (Jan)	0.3%	0.3%
13:30	USD	U.S. Consumer Price Index (CPI) YoY (YoY) (Jan)	2.5%	2.7%
13:30	USD	U.S. Core Consumer Price Index (CPI) MoM (MoM) (Jan)	0.3%	0.2%

### Yen Set for 2% Weekly Gain

Asian equities stepped back from record highs after a sharp selloff in U.S. technology stocks reignited concerns about AI-driven disruption. The MSCI Asia Pacific Index fell 0.8%, though it remains on course for its strongest week since September 2024. U.S. futures steadied, gold rose 1%, Bitcoin edged higher, and the 10-year Treasury yield held near 4.11% ahead of key inflation data.

Treasuries stayed close to a two-month low as markets positioned for the January CPI report, with headline and core inflation both seen at 2.5%. Solid payroll figures signaled labor resilience, even as jobless claims exceeded estimates. The Federal Reserve is widely expected to hold rates in March, with two 25-basis-point cuts priced for June and September.

The Dollar Index hovered around 97, moving sideways for a fourth session. The greenback is set to lose more than 2% against the yen, while the Australian dollar strengthened on firmer signals from the Reserve Bank of Australia.

U.S. stock futures stabilized after Thursday's selloff, when the Dow fell 1.34%, the S&P 500 1.57%, and the Nasdaq 2.03%. In after-hours trading, Applied Materials jumped 12%, Rivian rose 16%, while Pinterest dropped 18%. Markets remain focused on inflation data to shape rate expectations.

## Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
<b>CURRENCIES</b>					
EURUSD	1.18677	-0.02%	0.45%	1.92%	1.08%
GBPUSD	1.36174	-0.04%	0.06%	1.29%	1.17%
AUDUSD	0.70873	-0.04%	1.06%	6.06%	6.21%
NZDUSD	0.60338	-0.04%	0.33%	4.97%	4.83%
USDJPY	153.085	0.23%	-2.63%	-3.38%	-2.34%
USDCAD	1.3616	0.04%	-0.43%	-1.91%	-0.76%
<b>METALS</b>					
XAUUSD	4956.02	0.69%	-0.25%	7.09%	14.73%
SILVER	77.166	2.66%	-1.04%	-17.16%	8.29%
PLATIN	2024.2	0.12%	-3.58%	-15.16%	-2.21%
<b>INDICES</b>					
S&P 500	6825.37	-0.11%	-1.54%	-1.46%	-0.29%
DOW JONES	49387	-0.13%	-1.45%	0.48%	2.75%
NASDAQ	24662	-0.11%	-1.65%	-3.16%	-2.33%
NIKKEI	57064	-1.00%	5.18%	5.01%	13.36%
DAX	24901	0.19%	0.73%	-1.52%	1.68%
<b>ENERGY</b>					
CRUDE OIL	62.811	-0.05%	-1.16%	1.28%	9.39%
BRENT OIL	67.568	0.07%	-0.71%	1.58%	11.04%
NATURAL GAS	3.1405	-2.38%	-8.23%	0.66%	-14.80%
<b>BONDS</b>					
US 10Y	4.118	1.40%	-0.10%	-0.02%	-0.05%
DE 10Y	4.455	2.64%	-0.11%	0.05%	-0.02%
JAPAN 10Y	2.217	1.78%	-0.02%	0.03%	0.14%
UK 10Y	4.747	0.10%	-0.07%	0.04%	-0.01%
CHINA 10Y	2.7635	1.35%	-0.08%	-0.05%	-0.10%

## EURUSD



EUR/USD hovered near 1.1870 as markets positioned before Friday's U.S. CPI release. Stronger U.S. labor data tempered expectations for an early move from the Federal Reserve, lending support to the dollar.

The European Central Bank signaled comfort with the Euro's recent advance, while Francois Villeroy de Galhau's planned June departure drew attention. Christine Lagarde urged restraint in responding to short-term swings, noting the broader inflation trend remains constructive.

EUR/USD is testing resistance at 1.1920, with support near 1.1840.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.2000	1.1970	1.1920	1.1840	1.1780	1.1730

## XAUUSD



Gold recovered toward \$4,960 per ounce, rebounding from a drop of more than 3% in the prior session. The earlier slide reflected broad liquidation across asset classes, including equities and cryptocurrencies, as traders raised cash amid sharp volatility.

Focus now turns to U.S. inflation data, which may influence the policy path. Central-bank demand, currency concerns, and geopolitical risk continue to provide an underlying bid despite a modest weekly decline.

Gold is facing resistance at \$5,000, while support stands near \$4,885.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
5200	5085	5000	4885	4820	4750

## 🇸🇬 BTCUSD



TradingView

BTC/USD is testing resistance at 70,000, with support near 65,000.

Bitcoin traded around 66,500, showing limited upside as cautious positioning and ETF outflows weighed on sentiment.

Technical signals remain restrained: the RSI has bounced from oversold levels but lacks conviction, while the MACD stays below its signal line. A sustained break above 70,000 would improve the technical outlook.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
80.000	74.000	70.000	65.000	62.500	60.000

## 🇸🇬 USDJPY



TradingView

USD/JPY is testing resistance at 153.70, with support near 152.50.

The yen slipped beyond 153 per dollar yet remained on track for its strongest weekly gain since November 2024.

Confidence around Prime Minister Sanae Takaichi's fiscal expansion plan supported sentiment, with stimulus measures framed as targeted and fiscally manageable. Currency official Atsushi Mimura reiterated vigilance on excessive FX moves.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
155.60	154.50	153.70	152.50	151.70	150.50

## BRENT OIL



Brent hovered near \$67.5 per barrel, steadying after a nearly 3% decline and heading toward a second weekly loss.

The International Energy Agency flagged a potential surplus of more than 3.7 million barrels per day in 2026, while trimming demand projections and noting inventories rose in 2025 at the fastest pace since 2020. Ongoing dialogue between Washington and Tehran eased the immediate disruption risk.

Brent is testing resistance at \$68.70, with support near \$66.70.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
70.20	69.40	68.70	66.70	65.50	64.30

## NASDAQ



The Nasdaq Composite moved lower following a 2.03% drop in the previous session, as scrutiny over AI-related spending weighed on technology shares.

Rising capital expenditure and competitive disruption remain central themes. Futures steadied ahead of CPI, with inflation data expected to shape policy expectations.

Nasdaq is testing resistance at 25,000, with support near 24,520.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$25,600	\$25,300	\$25,000	\$24,520	\$24,150	\$23,850

## USDCNH



The offshore yuan traded near 6.90 per dollar, staying close to its strongest level since May 2023 after a multi-session rally. Support stems from Beijing's push to enhance the currency's global role and broader dollar softness, though gains remain moderated by a moderately loose policy stance.

A widening U.S. trade deficit added volatility across currency markets.

USD/CNH is testing resistance at 6.9110, with support near 6.8900.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
6.9380	6.9250	6.9110	6.8900	6.8750	6.8600

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