

# DAILY ANALYSIS

13 April 2026



## Economic Calendar

Time	Cur.	Event	Forecast	Previous
14:00	USD	Existing Home Sales (Mar)	4.07M	4.09M

### Energy Fears Drive a New Wave of Pressure

US stock futures started the week lower after Donald Trump announced a blockade of the Strait of Hormuz following the collapse of US–Iran negotiations. Major indexes fell by more than 1%, while JD Vance left Islamabad without progress, citing unresolved disputes over Iran’s nuclear policy. Rising energy prices added pressure just as earnings season began, with major banks set to report.

The US 10-year Treasury yield rose to around 4.35%, reversing last week’s decline as tension intensified. Higher oil prices reinforced inflation risks, strengthening expectations that the Federal Reserve may keep policy tight for longer.

The dollar index moved back above 99, regaining ground as demand for safety increased. Persistent geopolitical strain and elevated energy costs continued to support the currency.

The 10-year government bond yield in Japan climbed to 2.48%, its highest level since 1997, as rising energy costs lifted inflation expectations and encouraged markets to price in firmer policy from the Bank of Japan.

Negotiations between US and Iranian officials ended without agreement after 21 hours in Islamabad, with disputes over control of the Strait of Hormuz and nuclear policy still unclear.

## Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
<b>CURRENCIES</b>					
EURUSD	1.16862	-0.33%	1.26%	1.58%	-0.46%
GBPUSD	1.34003	-0.47%	1.25%	0.60%	-0.44%
AUDUSD	0.7033	-0.45%	1.67%	-0.55%	5.40%
NZDUSD	0.58209	-0.31%	1.92%	-0.70%	1.13%
USDJPY	159.745	0.30%	0.04%	0.42%	1.91%
USDCAD	1.3863	0.16%	-0.34%	1.29%	1.04%
<b>METALS</b>					
XAUUSD	4716.08	-0.75%	1.40%	-5.81%	9.17%
SILVER	74.146	-2.02%	1.98%	-8.18%	4.05%
PLATIN	2043.1	-1.07%	3.32%	-2.47%	-1.30%
<b>INDICES</b>					
S&P 500	6770.39	-0.68%	2.40%	1.06%	-1.10%
DOW JONES	47578	-0.71%	1.95%	1.35%	-1.01%
NASDAQ	24927	-0.75%	3.04%	1.10%	-1.28%
NIKKEI	56268	-1.15%	5.34%	4.68%	11.78%
DAX	23523	-1.18%	2.62%	-0.17%	-3.95%
<b>ENERGY</b>					
CRUDE OIL	104.875	8.60%	-6.70%	12.17%	82.65%
BRENT OIL	102.274	7.43%	-6.83%	2.06%	68.08%
NATURAL GAS	2.6813	1.26%	-4.61%	-11.30%	-27.26%
<b>BONDS</b>					
US 10Y	4.3540	0.0140	0.01%	0.13%	0.18%
DE 10Y	3.0481	0.0380	0.04%	0.12%	0.19%
JAPAN 10Y	2.4780	0.0361	0.05%	0.20%	0.40%
UK 10Y	4.7740	0.0003	-0.06%	0.00%	0.30%
CHINA 10Y	1.8040	0.0110	-0.01%	-0.03%	-0.06%

## EURUSD



EUR/USD retreated as tension intensified following the breakdown of US–Iran negotiations, which ended without an agreement after 21 hours of talks. Pressure increased further after CENTCOM confirmed preparations to restrict maritime traffic to and from Iranian ports starting Monday.

Comments from Iranian Parliament Speaker Mohammad Bagher Ghalibaf underscored the lack of trust between the two sides, reinforcing demand for the US dollar.

EUR/USD's first resistance is at 1.1720, while the closest support is positioned at 1.1640.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1830	1.1770	1.1720	1.1640	1.1570	1.1400

## XAUUSD



Gold dropped nearly 2% to below \$4,700 per ounce, reversing earlier gains after Washington signaled plans to impose a blockade on the Strait of Hormuz, raising concerns about a potential energy shock.

The collapse of negotiations in Pakistan added to inflation worries, strengthening expectations that central banks may keep policy tight for longer. The metal remains more than 10% lower since the conflict began.

First resistance is seen at \$4800, with initial support near \$4610.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
5000	4920	4800	4610	4500	4420

## USDJPY



USD/JPY struggled to build on recent gains as speculation about possible intervention from Japanese authorities limited additional yen weakness.

Despite that restraint, the broader backdrop continues to favor the dollar, and technical signals suggest upward pressure could resume if the pair secures a clear move above the 160.00 threshold.

First resistance stands at 160.20, while the first support is located at 159.00.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
161.30	160.80	160.20	159.00	158.10	156.80

## BTCUSD



Bitcoin traded at 71,234, rising 0.71% from the previous session. Over the past four weeks, performance has remained nearly flat with a gain of 0.01%, reflecting consolidation after a sharp correction.

A weekly advance of more than 6% points to renewed buying interest, though short-term signals still leave room for further sideways movement or brief pullbacks.

Bitcoin's first resistance stands at 72.500, while support is at 69,000.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
77.800	74.400	72.500	69.000	66.500	62.100

## BRENT OIL



Brent crude surged about 8% to around \$103 per barrel, recovering last week's losses after the United States announced a blockade targeting vessels entering or leaving Iranian ports following failed negotiations. The restrictions are scheduled to begin at 10 a.m. Eastern Time.

The talks ended without progress, with Washington citing continued nuclear concerns, while Tehran reportedly demanded broader concessions, including control over the strait and access to frozen assets.

Brent's resistance is seen at 104.40, with initial support near 100.00.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
109.30	107.20	104.40	100.00	97.50	94.30

## NASDAQ



The US 100 index traded at 24,937, gaining 0.14%. Over the past four weeks, the index has risen 1.14%, reflecting steady momentum.

Recent gains were supported by improved sentiment tied to ceasefire developments, yet shifting expectations after the weekend negotiations suggest conditions could change quickly. Equities remain highly sensitive to headlines across regions.

Nasdaq's resistance is seen at 25.250, with initial support near 24.700.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$25.810	\$25.500	\$25.250	\$24,700	\$24,370	\$24,000

## USD/CNH



The offshore yuan weakened to around 6.83 per dollar, ending a six-session advance as the dollar strengthened after negotiations between Washington and Tehran failed to produce an agreement.

Both sides acknowledged persistent differences, and the announcement of a US naval blockade of the Strait of Hormuz increased concern about potential disruptions to global energy flows.

USD/CNH is testing resistance at 6.8500, with support positioned near 6.8200.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
6.9020	6.8650	6.8500	6.8200	6.8050	6.7800

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