

DAILY ANALYSIS

13 October 2026



Economic Calendar

Time	Cur.	Event	Actual	Forecast	Previous
06:00	EUR	German CPI (MoM) (Sep)	0.6%	0.6%	0.2%
14:00	USD	Existing Home Sales (Sep)		3.96M	3.98M

Oil Retreat Comes with a Problem

Brent retreated toward \$105 as Russian diesel exports resumed, but attacks on Ukrainian energy infrastructure and Saudi Arabia kept supply risks in focus. Gold struggled below \$4,200 as the dollar reached an 18-month high. Traders see nearly an 88% chance of a December Fed hike, making Wednesday's US CPI a key test for rate expectations.

The euro slipped below 1.12 as France's fiscal challenges and political divisions complicated its deficit reduction plans. The dollar benefited from stronger US economic conditions, while higher energy costs added pressure on European currencies.

The yen recovered toward 158 per dollar as Japan's producer inflation slowed to 6.8%, keeping a December or January BoJ hike in play. Meanwhile, the offshore yuan strengthened to 6.69, its highest since July 2022, supported by firm exports and a stronger PBOC fixing.

Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
CURRENCIES					
EURUSD	1.11749	0.18%	-0.75%	-3.24%	-4.82%
GBPUSD	1.32208	0.10%	-0.41%	-2.06%	-1.78%
AUDUSD	0.69603	0.01%	-0.32%	-2.52%	4.31%
NZDUSD	0.55945	0.12%	-0.52%	-3.19%	-2.81%
USDJPY	158.279	-0.21%	0.11%	2.55%	0.97%
USDCAD	1.42711	-0.07%	0.45%	2.66%	4.01%
METALS					
XAUUSD	4184.78	0.31%	0.49%	-2.66%	-3.13%
SILVER	60.356	0.09%	-1.60%	-4.55%	-15.30%
PLATIN	1700.7	0.43%	-0.50%	-4.44%	-17.84%
INDICES					
S&P 500	7798.71	-0.11%	-0.26%	2.35%	13.92%
DOW JONES	52028	0.34%	0.98%	-0.75%	8.25%
NASDAQ	30442	-0.73%	-2.51%	4.52%	20.56%
NIKKEI	67777	-1.82%	-4.11%	6.75%	34.64%
DAX	25300	0.09%	-0.59%	-0.55%	3.30%
ENERGY					
CRUDE OIL	92.453	-1.37%	3.37%	-8.81%	61.01%
BRENT OIL	105.327	-1.24%	4.72%	-0.33%	73.09%
NATURAL GAS	3.1762	0.29%	2.00%	9.68%	-13.83%
BONDS					
US 10Y	5.1950	0.0400	-0.09%	0.21%	1.02%
DE 10Y	3.4357	0.0395	-0.05%	-0.10%	0.57%
JAPAN 10Y	3.0100	0.0060	-0.10%	0.02%	0.94%
UK 10Y	35.4950	2.7150	2.82%	3.43%	8.34%
CHINA 10Y	7.3750	0.0150	0.18%	0.30%	0.82%

EURUSD



EUR/USD started the week below 1.12, near a 17-month low, as France's fiscal troubles and a resilient US economy favored the dollar.

Paris aims to reduce its deficit to 5% of GDP in 2027, but political divisions and the approaching presidential election complicate spending cuts.

Higher oil prices, Wednesday's US CPI and ECB commentary at the IMF-World Bank meetings in Bangkok could shape the next move.

The first resistance is positioned at 1.1210, while the support starts at 1.1140.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1320	1.1280	1.1210	1.1140	1.1100	1.1050

XAUUSD



Gold traded below \$4,200 as the dollar reached an 18-month high before key US inflation data. Traders see roughly an 80% chance of an October Fed pause but nearly 88% odds of a December hike.

Rising oil prices, Middle East tensions and the breakdown of the Russia-Ukraine energy truce added to inflation concerns, strengthening the case for tighter policy.

First resistance is seen at \$4210, with initial support near \$4170.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
4300	4240	4210	4170	4100	4060

USDJPY



The yen strengthened toward 158 per dollar, ending a two-session decline after Japan's holiday weekend.

September producer inflation slowed to 6.8%, below the 7.6% forecast and its weakest since May. Still, persistent price pressures kept BoJ tightening on the table. Governor Ueda emphasized the impact on consumer prices and spending, with December or January considered more likely than October for the next hike.

First resistance is seen at 158.90, with initial support near 157.50.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
162.50	160.10	158.90	157.50	155.40	152.60

BTCUSD



Bitcoin gained 1.20%, to \$82,752 on October 13, extending its four-week advance to 5.88%. Despite the recovery, the cryptocurrency remains 26.83% lower year over year.

Initial resistance sits near 85,400, with support around 81,500.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
93.700	88.500	85.400	81.500	80.400	77.500

BRENT OIL



Brent slipped toward \$105 on Tuesday, ending three sessions of gains after Russia partially eased diesel export restrictions under an October 10 agreement with the US.

The deal drew criticism in Congress over possible violations of Russian energy import restrictions.

Meanwhile, recent attacks on Ukrainian energy infrastructure threatened the ceasefire, while Houthi strikes on Riyadh's airport increased pressure on Washington to support Saudi Arabia.

Resistance is seen at 106.90, while the nearest support stands at 102.20.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
109.50	107.30	106.90	102.20	100.00	96.50

NASDAQ



The US 100 Tech Index fell 218 points to 30,460 on October 13.

The index has declined 4.57% over the past four weeks, although it remains 23.92% higher than a year ago.

Resistance stands at 30.900, while the nearest support is located at 30,050.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$32.250	\$31.500	\$30.900	\$30,050	\$29,750	\$29,400

USDCNH



The offshore yuan strengthened toward 6.69 per dollar, its highest since July 2022, supported by solid exports and expectations that the currency remains undervalued.

The PBOC reinforced the move with a midpoint fixing of 6.7313, its strongest since February 2023.

A China-EU agreement could more than halve Chinese hybrid car exports to Europe, with upcoming inflation and trade figures offering the next economic signals.

The first resistance stands at 6.6990, while support begins at 6.6880.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
6.7450	6.7210	6.6990	6.6880	6.6790	6.6290

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 zitaplus.com

 support@zitaplus.com

 +44 7442 667878

 Craigmuir Chambers, Road Town, Tortola,
VG 1110, British Virgin Islands

