

DAILY ANALYSIS

14 October 2026



Economic Calendar

Time	Cur.	Event	Forecast	Previous
16:30	USD	Core CPI (MoM) (Sep)	0.2%	0.3%
16:30	USD	CPI (MoM) (Sep)	0.6%	0.4%

Europe Finds Relief, Asia Splits

The euro recovered slightly from an 18-month low to just below \$1.12, while sterling held near \$1.323 following the IMF's upgrade to UK growth forecasts. In Asia, the yen weakened to 158.5 as an October BoJ hike looked unlikely. The yuan, meanwhile, approached its strongest since July 2022 near 6.69, supported by China's \$133.53 billion trade surplus and record exports and imports.

Brent climbed above \$106 as Houthi strikes on Saudi Aramco and Iranian attacks on tankers in the Strait of Hormuz threatened energy supplies. The IMF added to concerns, warning that Middle East tensions, rising debt and a potential AI downturn could threaten global growth.

Gold hovered near \$4,150 and silver around \$59 before US CPI data, with an 88% probability of a December Fed hike keeping precious metals under pressure. The inflation report could reshape rate expectations, particularly as rising oil prices threaten to push consumer costs higher.

The Nasdaq 100 declined 0.31% to 30,635, reflecting pressure on technology shares as concerns over AI valuations persisted. Bitcoin moved higher, gaining 0.75% to \$83,720, outperforming the tech index despite uncertainty surrounding interest rates.

Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
CURRENCIES					
EURUSD	1.12096	0.10%	0.12%	-2.89%	-4.52%
GBPUSD	1.32685	0.10%	0.41%	-1.55%	-1.42%
AUDUSD	0.69998	0.23%	0.53%	-1.85%	4.90%
NZDUSD	0.56202	0.15%	0.36%	-2.38%	-2.36%
USDJPY	158.295	-0.02%	0.14%	2.06%	0.99%
USDCAD	1.42051	-0.08%	-0.36%	2.06%	3.53%
METALS					
XAUUSD	4154.4	-0.17%	1.06%	-3.21%	-3.83%
SILVER	58.821	-0.59%	-1.55%	-7.58%	-17.46%
PLATIN	1670.4	-0.05%	1.25%	-6.00%	-19.30%
INDICES					
S&P 500	7816.2	0.14%	0.19%	3.04%	14.18%
DOW JONES	51773	0.20%	1.16%	-0.61%	7.72%
NASDAQ	30540	-0.10%	-1.99%	5.54%	20.95%
NIKKEI	67903	0.19%	-3.05%	6.96%	34.89%
DAX	25342	0.33%	0.95%	-0.24%	3.48%
ENERGY					
CRUDE OIL	94.363	0.24%	6.89%	-10.84%	64.34%
BRENT OIL	106.004	0.30%	5.79%	-2.52%	74.21%
NATURAL GAS	3.3108	0.85%	3.37%	13.42%	-10.18%
BONDS					
US 10Y	5.2030	0.0190	-0.09%	0.20%	1.03%
DE 10Y	3.4550	0.0058	-0.03%	-0.08%	0.59%
JAPAN 10Y	2.9990	0.0040	-0.11%	-0.04%	0.93%
UK 10Y	32.8000	0.0500	-0.02%	0.73%	5.64%
CHINA 10Y	7.4060	0.0520	0.15%	0.26%	0.78%

EURUSD



The euro tried to recover from an 18-month low, trading just under \$1.12 as oil paused and the dollar and yields eased.

Energy-driven inflation and doubts over France's ability to pass its 2027 budget keep weighing on the pair. Markets expect both the ECB and the Fed to hike in December.

The first resistance is positioned at 1.1240, while the support starts at 1.1150.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1320	1.1280	1.1240	1.1150	1.1100	1.1050

XAUUSD



Gold held near \$4,150 an ounce before the release of the US CPI data. Traders see a 77% chance the Fed holds rates this month and an 88% chance of a December hike.

NY Fed's Williams signaled one more hike may be needed this year but not in 2027. Middle East tensions and IMF warnings about an AI boom reversal, high debt and prolonged conflict remained in focus.

First resistance is seen at \$4190, with initial support near \$4140.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
4280	4250	4190	4140	4100	4050

USDJPY



The yen weakened to about 158.5 per dollar on reports that the BoJ is unlikely to hike back-to-back this month but may move in December. Governor Ueda said long-term yields should be set by markets.

Rising oil prices added further pressure.

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 rose 0.75% to 83,720, up 10.73% over four weeks but down 24.41% yearly. Forecasts point to 85,333 by quarter-end and 93,795 in a 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 climbed back above \$106 a barrel as conflicts between Saudi Arabia and Houthis escalated.

A Houthi missile strike sparked a fire at Saudi Aramco's Dhahran headquarters, and Iran has stepped up attacks on tankers in the Strait of Hormuz, although the US said it helped more than 19 million barrels pass safely.

Resistance is seen at 107.50, while the nearest support stands at 104.20.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
110.00	108.40	107.50	104.20	102.50	100.00

NASDAQ



The index slipped 0.31% to 30,635, extending a 5.87% four-week drop, though it is still up 23.80% yearly.

Trading Economics expects 30,213 by quarter-end and 28,288 in a year.

Resistance stands at 31.200, while the nearest support is located at 30,050.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$32.000	\$31.600	\$31.200	\$30,050	\$29,750	\$29,400

USD/CNH



The offshore yuan traded near 6.69, close to its strongest level since July 2022. China's September trade surplus jumped to \$133.53 billion as exports rose 36.3% and imports rose 31.0%, both records.

CPI edged up to 0.9% and PPI rose to 5.0%, the highest since June 2022, as oil costs squeezed margins.

The first resistance stands at 6.6990, while support begins at 6.6860.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
6.7450	6.7210	6.6990	6.6860	6.6790	6.6290

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