

DAILY ANALYSIS

19 October 2026



Economic Calendar

Time	Cur.	Event	Actual	Forecast	Previous
All Day	HKD	Hong Kong – Chung Yeung Day	-	-	-
02:00	CNY	GDP (YoY) (Q3)	4.5%	4.4%	4.3%

Europe Faces Trouble on Two Fronts

The euro slipped toward \$1.118 as protests across France and other European countries unsettled sentiment. Ukrainian strikes on Russian energy facilities added to inflation concerns, with higher oil prices threatening European growth. The currency later recovered some ground but remained vulnerable to further geopolitical tensions.

Gold rose above \$4,170 after Fed Chair Kevin Warsh offered no clear signal of an October rate hike. Markets now see an 84% chance of unchanged rates at the October 27-28 meeting. Meanwhile, the yen held near 158 as BOJ Governor Ueda suggested Japan's underlying inflation was approaching its 2% target.

Brent held near \$108 despite a modest pullback, supported by rising tensions around Yemen and the Strait of Hormuz. Houthi attacks near Saudi Arabia's Yanbu oil hub, damage to three tankers and Iran's restrictions on vessel passage raised concerns about global energy flows.

Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
CURRENCIES					
EURUSD	1.12196	-0.16%	0.58%	-2.14%	-4.44%
GBPUSD	1.33251	-0.02%	0.89%	-0.31%	-1.00%
AUDUSD	0.69714	0.37%	0.17%	-2.06%	4.48%
NZDUSD	0.5657	0.07%	1.23%	-1.01%	-1.72%
USDJPY	158.093	0.03%	-0.32%	0.47%	0.86%
USDCAD	1.41053	-0.25%	-1.23%	0.50%	2.80%
METALS					
XAUUSD	4171.38	0.12%	-0.01%	-3.95%	-3.44%
SILVER	57.628	1.12%	-4.43%	-12.69%	-19.13%
PLATIN	1660.1	1.65%	-1.97%	-7.84%	-19.80%
INDICES					
S&P 500	7715.61	0.73%	-1.17%	-0.63%	12.71%
DOW JONES	52211	0.40%	0.69%	0.31%	8.63%
NASDAQ	29615	1.46%	-3.42%	-2.85%	17.29%
NIKKEI	64900	-0.65%	-4.25%	-0.94%	28.92%
DAX	25554	-0.27%	1.09%	-0.08%	4.34%
ENERGY					
CRUDE OIL	99.276	-2.10%	5.91%	7.48%	72.90%
BRENT OIL	107.258	-2.37%	0.57%	6.89%	76.27%
NATURAL GAS	3.0934	-0.73%	-2.32%	9.08%	-16.08%
BONDS					
US 10Y	5.0750	0.0100	-0.16%	0.12%	0.90%
DE 10Y	3.4195	0.0086	-0.06%	-0.03%	0.56%
JAPAN 10Y	2.9110	0.0220	-0.11%	-0.08%	0.84%
UK 10Y	32.9100	0.1000	0.13%	0.29%	5.75%
CHINA 10Y	7.3590	0.0030	0.07%	0.29%	0.79%

EURUSD



The euro fell as much as 0.5% to \$1.118 before recovering some ground, as protests across France, Belgium, Italy and Portugal weighed on the currency.

Recent attacks on energy infrastructure in the Russia-Ukraine conflict added to concerns, with Ukrainian strikes reportedly setting fire to an oil export terminal and storage facility in St. Petersburg on Sunday.

Rising energy costs could further strain European growth and inflation, leaving the euro vulnerable to further losses.

The first resistance is positioned at 1.1260, while the support starts at 1.1180.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1350	1.1300	1.1260	1.1180	1.1120	1.1050

XAUUSD



Gold rose above \$4,170 after Fed Chair Kevin Warsh's cautious remarks reduced expectations for an October rate hike.

Speaking at the IMF meetings in Bangkok on Friday, Warsh offered no indication of the upcoming policy decision but said stronger-than-expected inflation had not changed his economic outlook. With the Fed entering its blackout period before the October 27–28 meeting, markets now price an 84% probability of unchanged rates.

First resistance is seen at \$4200, with initial support near \$4150.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
4300	4250	4200	4150	4100	4050

USDJPY



The yen traded near 158 per dollar, showing little movement after BOJ Governor Kazuo Ueda said underlying inflation was approaching the central bank's 2% target. He attributed persistent price pressures to a gradual economic recovery and tight labor conditions, reinforcing expectations of further monetary tightening.

Prime Minister Sanae Takaichi pledged to keep annual government bond issuance at an appropriate level.

First resistance is seen at 158.40, with initial support near 157.50.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
160.20	159.00	158.40	157.50	157.00	155.40

BTCUSD



Bitcoin climbed 0.51% to \$82,427, extending its four-week gain to 1.57%.

Despite the recent recovery, the cryptocurrency remains 25.47% lower than a year ago, highlighting the gap between its short-term performance and broader decline.

Initial resistance sits near 84,000, with support around 81,000.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
88.500	86.200	84.000	81.000	79.500	76.500

BRENT OIL



Brent slipped below \$108 but retained most of last week's gains as supply threats intensified across the Middle East.

Fighting between Saudi Arabia and Iran-backed Houthis showed little sign of easing, with a Saudi helicopter crashing near Yemen and Houthi attacks targeting the Yanbu oil export hub.

Three tankers were also damaged in the Strait of Hormuz over the weekend, while Iran's IRGC navy insisted that vessels could only pass through the

waterway with its permission.

Resistance is seen at 109.00, while the nearest support stands at 106.50.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
112.00	110.50	109.00	106.50	105.00	102.80

NASDAQ



The US 100 Tech Index fell 748 points to 29,550, bringing its four-week decline to 3.06%.

Despite remaining 17.54% higher year over year, Trading Economics forecasts suggest further downside, with projections of 28,572 by quarter-end and 26,801 over the next twelve months.

Resistance stands at 29,840, while the nearest support is located at 29,120.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$30.400	\$30.150	\$29,840	\$29,120	\$28,750	\$28,300

USDCNH



from 0.4%.

The offshore yuan strengthened to around 6.69 per dollar, its highest since June 2022, following strong Chinese economic data.

Third-quarter GDP growth accelerated to 4.5% year over year, up from 4.3% in the previous quarter and above the 4.4% forecast. Growth reached 4.6% over the first nine months, keeping China's 4.5%–5% annual target within reach.

September industrial output rose 5.5%, up from 5.2%, while retail sales growth improved to 1.1%

The first resistance stands at 6.6920, while support begins at 6.6800.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
6.7350	6.7110	6.6920	6.6800	6.6740	6.6580

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