DAILY ANALYSIS

21 August 2026

Economic Calendar

Time	Cur.	Event	Forecast	Previous
13:45	USD	S&P Global Manufacturing PMI (Aug)	54.0	53.9
13:45	USD	S&P Global Services PMI (Aug)	53.9	54.6

Dollar Retreat Reshapes FX

Broad dollar weakness lifted EUR/USD to $1.168, a three-month high, while GBP/USD topped $1.363, its strongest in six months. The move followed the US Treasury's plan to at least double purchases of longer-dated government bonds, pulling Treasury yields lower.

Gold held above $4,500, while silver traded above $68, putting both on course for a third straight weekly gain. Currency and bond volatility, higher oil prices, inflation concerns, and geopolitical risks supported demand for precious metals.

USD/JPY traded near 159 after a volatile week. Japanese inflation accelerated for a second month, strengthening expectations that the BOJ could raise rates as early as September.

Brent traded above $93, gaining more than 5% this week as the US-Iran conflict supported prices. The US100 fell 0.72% to 29,198, while Bitcoin gained 2.39% to $74,736. The offshore yuan strengthened to 6.7239 per dollar, its strongest since February 2023.

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Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
			CURRENCIES		
EURUSD	1.16746	-0.02%	1.27%	2.42%	-0.56%
GBPUSD	1.3605	-0.01%	0.88%	1.71%	1.08%
AUDUSD	0.71139	-0.16%	0.77%	1.64%	6.61%
NZDUSD	0.59481	0.20%	1.68%	2.11%	3.34%
USDJPY	158.453	0.18%	-0.65%	-2.89%	1.09%
USDCAD	1.38082	0.00%	-0.88%	-2.12%	0.64%
			METALS		
XAUUSD	4535	-0.59%	3.26%	10.14%	3.97%
SILVER	67.088	0.24%	4.14%	14.16%	-5.86%
PLATIN	1811.2	0.04%	4.56%	10.58%	-12.50%
			INDICES		
S&P 500	7718.67	0.14%	-1.03%	2.79%	12.76%
DOW JONES	53471	0.02%	-0.68%	2.39%	11.25%
NASDAQ	29486	0.20%	-1.99%	1.13%	16.78%
NIKKEI	66002	1.03%	-3.38%	-0.35%	31.11%
DAX	26080	-0.04%	-0.84%	4.27%	6.49%
			ENERGY		
CRUDE OIL	84.404	0.02%	3.88%	0.08%	46.99%
BRENT OIL	91.843	0.24%	5.48%	0.92%	50.93%
NATURAL GAS	2.7872	-0.95%	2.21%	-2.72%	-24.38%
			BONDS		
US 10Y	4.6410	0.009	-0.01%	0.01%	0.47%
DE 10Y	3.2625	0.0015	0.11%	0.11%	0.40%
JAPAN 10Y	2.8380	0.0590	-0.03%	0.11%	0.76%
UK 10Y	32.4600	0.0100	0.09%	0.28%	5.30%
CHINA 10Y	6.8280	0.0050	0.05%	0.04%	0.26%

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EURUSD

The euro climbed to $1.168, reaching a three-month high and gaining alongside other G10 currencies as the US Treasury's expanded bond repurchase program pressured the dollar.

The Treasury doubled planned purchases of long-term notes and bonds for the next financial quarter, potentially adding dollar liquidity through the Treasury General Account.

The first resistance is positioned at 1.1720, while the support starts from 1.1650.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1810	1.1750	1.1720	1.1650	1.1610	1.1570

XAUUSD

Gold held above $4,500, heading for a third straight weekly gain as volatility in currency and bond trading supported demand for precious metals.

Higher oil prices also added to inflation concerns.

First resistance is seen at $4560, with initial support near $4490.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
4640	4600	4560	4490	4420	4350

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USDJPY

The yen traded around 159 per dollar after a volatile start to the week, as stronger Japanese inflation strengthened expectations for a BOJ rate hike. Inflation accelerated for a second consecutive month, raising the possibility of a move as early as September.

Governor Kazuo Ueda has also indicated that policy normalization could proceed at a faster pace.

First resistance is seen at 159.50, with initial support near 157.20.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
161.50	160.70	159.50	157.20	156.00	155.30

BTCUSD

Bitcoin climbed to $74,736, gaining 1,741 points or 2.39% from the previous session.

It has advanced 13.06% over the past four weeks, although it is still 36.05% lower year-on-year. Bitcoin is forecast at $63,993 by quarter-end and $70,937 over the next 12 months.

First resistance is seen at 76,000, with initial support near 70.700.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
80.200	78.500	76.000	70.700	66.500	62.000

BRENT OIL

Brent traded above $93, heading for a second consecutive weekly gain with prices up more than 5% this week.

US-Iran tensions continued to support oil as both sides remained locked in a dispute over the Strait of Hormuz.

Resistance is seen at 92.50, while the nearest support stands at 90.00.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
95	93.70	92.50	90.00	88.70	85

NASDAQ

The US 100 Tech Index traded at 29,198, down 213 points or 0.72% from the previous session. The index has lost 0.69% over the past four weeks but remains 24.26% higher year-on-year.

It is forecast at 29,400 by quarter-end and 27,544 in one year.

Resistance stands at 29,750, while the nearest support is located at 29,100.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
$31.000	$30.400	$29.750	$29,100	$28,700	$28,200

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USDCNH

The offshore yuan strengthened to around 6.7239 per dollar, extending overnight gains to its strongest level since February 2023.

Persistent dollar weakness also supported currencies across Asia.

Resistance stands at 6.7300 while the nearest support is located at 6.7120.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
6.7670	6.7520	6.7300	6.7120	6.7000	6.6850

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