DAILY ANALYSIS

22 June 2026

Economic Calendar

Time	Cur.	Event	Forecast	Previous
12:30	CAD	Core CPI (YoY) (May)	2.9%	2.8%

Tensions at the Diplomacy Table

US–Iran talks in Switzerland faced fresh strain after reports that the Iranian delegation briefly walked out following comments from Donald Trump. The discussions, mediated by Qatar and Pakistan and involving senior officials including US Vice President JD Vance, later resumed despite reports of a temporary suspension.

Attention remained split between the negotiations and upcoming US PCE inflation data. US stock futures moved lower, while the 10-year Treasury yield climbed to around 4.48% as expectations for further Fed tightening persisted after last week's hawkish signals.

The dollar index traded near 100.8, close to its highest level since May 2025, supported by rate hike expectations and anticipation of the inflation report. Reports that both sides had agreed to continue working toward a potential deal over the next 60 days helped ease some geopolitical concerns, though uncertainty surrounding the talks remained.

Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
CURRENCIES					
EURUSD	1.14389	-0.17%	-1.12%	-1.58%	-2.57%
GBPUSD	1.31855	-0.15%	-1.63%	-1.85%	-2.04%
AUDUSD	0.69958	-0.25%	-0.73%	-2.16%	4.84%
NZDUSD	0.57339	-0.37%	-1.72%	-2.30%	-0.38%
USDJPY	161.397	0.01%	0.73%	1.56%	2.96%
USDCAD	1.41529	0.14%	1.17%	2.96%	3.15%
METALS					
XAUUSD	4181.14	0.71%	-2.98%	-8.50%	-3.21%
SILVER	65.584	1.05%	-6.28%	-16.00%	-7.97%
PLATIN	1660.8	-0.43%	-6.32%	-14.90%	-19.77%
INDICES					
S&P 500	7468.2	-0.43%	-1.14%	-0.68%	9.10%
DOW JONES	51440	-0.24%	-0.45%	1.94%	7.03%
NASDAQ	30269	-0.45%	-0.90%	0.89%	19.88%
NIKKEI	72677	2.00%	4.85%	11.54%	44.37%
DAX	24986	0.00%	0.37%	-1.59%	2.02%
ENERGY					
CRUDE OIL	75.672	-2.15%	-6.29%	-19.40%	31.79%
BRENT OIL	79.417	-1.45%	-4.51%	-17.85%	30.51%
NATURAL GAS	3.2926	2.99%	4.63%	9.39%	-10.67%
BONDS					
US 10Y	4.4850	0.0250	0.00%	-0.01%	0.31%
DE 10Y	2.9843	0.0612	-0.02%	-0.11%	0.12%
JAPAN 10Y	2.6620	0.0154	0.08%	-0.03%	0.59%
UK 10Y	30.9700	0.0700	-0.41%	-2.26%	3.81%
CHINA 10Y	6.8500	0.0110	-0.04%	-0.25%	0.28%

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EURUSD

The euro remained near $1.145, its lowest level since mid-March, and was on track for a weekly loss of around 1% as demand for the US dollar stayed strong.

The cancellation of US–Iran talks in Switzerland raised fresh questions about the durability of the recent peace framework, while the Federal Reserve's hawkish tone continued to support the greenback. In Europe, persistent inflation concerns kept expectations for further ECB tightening intact.

The first resistance level stands at 1.1500, while initial support is located at 1.1440.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1670	1.1580	1.1500	1.1440	1.1390	1.1350

XAUUSD

Gold rebounded toward $4,200 per ounce as easing oil prices reduced some inflation concerns following reports of a 60-day US–Iran peace framework.

Although tensions around the Strait of Hormuz briefly resurfaced, oil shipments remained uninterrupted and Gulf producers signaled higher output. Attention is now turning to US PCE inflation data and the Fed's policy outlook.

First resistance is seen at $4,220, with initial support near $4,135.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
4350	4280	4220	4135	4090	4000

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USDJPY

The yen weakened to around 161.5 per dollar, trading close to its lowest level since 1986. Intervention warnings from Japanese officials had little impact, while the wide interest-rate differential between the US and Japan continued to support the dollar.

The currency remained under pressure despite BOJ's recent rate increase to 1%.

First resistance is seen at 161.90, with initial support near the 160.80 level.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
163	162.50	161.90	160.80	159.60	158.50

BTCUSD

Bitcoin remains range-bound after its 2025–2026 peak, fluctuating between $60,000 and $66,000.

Repeated rejection near $67,000 and steady demand around $60,000 have kept prices confined within a broad consolidation pattern. Momentum remains limited as traders await a fresh catalyst.

First resistance is seen at 65.200, with initial support near the 62.500 level.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
70.000	66.800	65.200	62.500	60.900	57.500

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BRENT OIL

Brent crude slipped below $80 per barrel as improving US–Iran negotiations eased concerns over supply disruptions.

Qatar and Pakistan announced that both sides had agreed to pursue a 60-day process toward a broader peace agreement. While prices initially surged on Strait of Hormuz tensions, they later retreated as talks continued and oil flows remained stable.

Resistance is seen at 81.00, while the nearest support stands at 76.20.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
90.00	84.00	81.00	76.20	71.00	64.00

NASDAQ

The Nasdaq 100 continues to consolidate after a strong rally, with the broader uptrend remaining intact.

Momentum has moderated near record highs, but buying interest on pullbacks continues to provide support. Current price action suggests a pause before the next directional move develops.

Resistance stands at 30,950, while the nearest support is located at 30,000.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
$31.800	$31.400	$30.950	$30.000	$29.670	$28.750

USDCNH

The offshore yuan edged higher to around 6.77 per dollar, recovering part of its recent losses as sentiment improved following progress in US–Iran negotiations.

The PBOC left benchmark lending rates unchanged for a thirteenth consecutive month, maintaining a cautious approach. Export activity has remained resilient, although weak domestic demand and property-sector challenges continue to weigh on growth.

Resistance stands at 6.7820 while the nearest support is located at 6.7450

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
6.8800	6.8250	6.7820	6.7450	6.7100	6.6800

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