

DAILY ANALYSIS

25 June 2026



Time	Cur.	Event	Forecast	Previous
00:30	USD	U.S. President Trump Speaks		
12:30	USD	Core PCE Price Index (YoY) (May)	3.4%	3.3%
12:30	USD	Core PCE Price Index (MoM) (May)	0.3%	0.2%
12:30	USD	GDP (QoQ) (Q1)	1.6%	2.0%
12:30	USD	Durable Goods Orders (MoM) (May)	-5.0%	8.0%
12:30	USD	Initial Jobless Claims	225K	226K

A New Tool for Beijing

China's central bank announced overnight reverse repo operations to strengthen short-term liquidity management. While the move modernizes the PBOC's policy toolkit, the yuan continued to face pressure from broad dollar strength.

The dollar remained firm after the Fed reinforced expectations that interest rates could stay higher for longer. Attention now turns to the upcoming PCE inflation report, which could shape the next move in policy expectations.

Brent crude extended its decline as improving US-Iran relations strengthened the global supply outlook. Higher tanker traffic through the Strait of Hormuz and continued Iranian exports kept pressure on oil prices.

Technology stocks were under pressure as high bond yields and stretched AI valuations weighed on sentiment. The latest selloff pushed major semiconductor names lower and kept the Nasdaq on the defensive.

Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
CURRENCIES					
EURUSD	1.1367	0.08%	-0.79%	-2.27%	-3.18%
GBPUSD	1.318	0.09%	-0.20%	-1.98%	-2.08%
AUDUSD	0.68953	-0.08%	-1.68%	-3.81%	3.34%
NZDUSD	0.56397	-0.16%	-2.00%	-3.35%	-2.02%
USDJPY	161.713	-0.04%	0.21%	1.51%	3.17%
USDCAD	1.42314	-0.02%	0.69%	3.03%	3.72%
METALS					
XAUUSD	3973.06	-0.66%	-5.63%	-11.91%	-8.03%
SILVER	56.868	-0.86%	-13.38%	-26.09%	-20.20%
PLATIN	1563.4	-1.17%	-8.43%	-19.89%	-24.47%
INDICES					
S&P 500	7397.71	0.54%	-1.37%	-1.61%	8.07%
DOW JONES	51868	0.04%	0.59%	2.79%	7.92%
NASDAQ	29732	1.75%	-2.22%	-0.90%	17.75%
NIKKEI	72006	4.09%	1.34%	10.79%	43.04%
DAX	24749	0.04%	-1.11%	-1.73%	1.06%
ENERGY					
CRUDE OIL	69.188	-1.64%	-8.78%	-26.31%	20.49%
BRENT OIL	72.39	-1.83%	-9.34%	-25.12%	18.96%
NATURAL GAS	3.249	0.87%	0.49%	7.94%	-11.86%
BONDS					
US 10Y	4.4130	0.0220	-0.05%	-0.08%	0.24%
DE 10Y	2.8705	0.0463	-0.06%	-0.08%	0.01%
JAPAN 10Y	2.6320	0.0401	0.01%	-0.09%	0.56%
UK 10Y	31.0200	0.1200	0.09%	-1.92%	3.86%
CHINA 10Y	6.8000	0.0370	-0.06%	-0.23%	0.23%

EURUSD



The euro fell to \$1.136, its lowest level in a year, as a stronger dollar continued to weigh on currency markets. Although the ECB raised rates by 25 basis points, President Christine Lagarde signaled there was no urgency for further aggressive tightening.

Weak PMI data showed German business activity contracting at its fastest pace since 2024, leaving the eurozone economy in contraction.

The first resistance level stands at 1.1400, while initial support is located at 1.1320.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1540	1.1460	1.1400	1.1320	1.1290	1.1200

XAUUSD



Gold steadied near \$4,000 per ounce, holding close to an eight-month low as expectations for higher US interest rates continued to outweigh support from easing geopolitical tensions.

The stronger dollar also reduced demand from overseas buyers, while expectations for a September Fed rate increase under Chair Kevin Warsh kept bullion under pressure.

First resistance is seen at \$4040, with initial support near \$3960.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
4150	4090	4040	3960	3910	3840

USDJPY



The yen hovered near 161.7 per dollar, remaining close to its weakest level since 1986. Comments from Japanese officials failed to provide lasting support, while the wide yield gap between the US and Japan continued to favor the dollar.

Minutes from the Bank of Japan's latest meeting showed policymakers broadly supporting further rate increases as inflation moves closer to the target.

First resistance is seen at 162.20, with initial support near the 161.00 level.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
163.00	162.60	162.20	161.00	160.50	160.00

BTCUSD



Bitcoin traded near the \$60,000-\$61,000 range, with price action continuing to show lower highs and lower lows.

Weak ETF inflows and expectations of tighter US monetary policy continued to limit buying interest. A sustained move above \$63,500 would be needed to improve the near-term outlook.

First resistance is seen at 62.600, with initial support near the 59,750 level.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
70.000	66.800	62.600	59.750	56.900	52.000

BRENT OIL



Brent crude dropped toward \$73 per barrel, extending its four-session decline as improving US-Iran relations strengthened expectations for higher global supply.

Rising tanker traffic through the Strait of Hormuz, additional Middle Eastern and West African cargoes, and a US waiver allowing Iranian oil purchases all contributed to the weaker price outlook.

Brent's prompt spread also moved into contango

for the first time since the conflict began.

Resistance is seen at 75.40, while the nearest support stands at 70.20.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
80.50	77.00	75.40	70.2	68.00	65.50

NASDAQ



The NAS100 fell 3.3% to 29,347 as heavy selling across AI and semiconductor stocks accelerated the decline. Nvidia, AMD, and Micron led losses, pushing the index below the 30,000 level.

Attention now turns to inflation data and earnings reports for the next indication of direction.

Resistance stands at 30,300, while the nearest support is located at 29,400.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$30.900	\$30.700	\$30.300	\$29.400	\$29.100	\$28.750

USD/CNH



The offshore yuan held near 6.81 per dollar, remaining close to a one-month low.

The People's Bank of China introduced overnight reverse repo operations alongside its existing seven-day facility to improve short-term liquidity management, while broad dollar strength continued to support USD/CNH.

Resistance stands at 6.8180 while the nearest support is located at 6.7650.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
6.9000	6.8520	6.8180	6.7650	6.7100	6.6800

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