DAILY ANALYSIS

27 July 2026

ZITA PLUS

Economic Calendar

Time	Cur.	Event	Forecast	Previous
12:30	USD	Durable Goods Orders (MoM) (Jun)	1.6%	-4.5%

Truce Lifts Risk Appetite

US stock futures rose as a weekend pause in US-Iran hostilities sent oil prices lower, easing inflation concerns. Despite the truce, Houthi attacks on Saudi Red Sea facilities kept supply risks in focus. Attention now turns to earnings from Apple, Microsoft, Meta, Visa, Exxon, Starbucks, Ford, and PayPal, along with Wednesday's Fed decision, where rates are expected to stay unchanged.

More S&P 500 companies are raising guidance than lowering it, with 93% beating earnings estimates versus a 78% historical average. Stocks have still struggled to build momentum as concerns over AI spending, geopolitical risks, and rich valuations persist. Gains have also broadened beyond Big Tech into sectors such as energy and semiconductors.

The US Dollar Index slipped to around 101.2 as lower oil prices reduced inflation concerns following the US-Iran truce. Investors now look ahead to this week's Fed decision, Q2 GDP, PCE inflation, and major corporate earnings.

The 10-year Treasury yield fell to around 4.64%, retreating from six-month highs as easing geopolitical tensions pushed oil prices lower. Markets now wait for the Fed meeting, Q2 GDP, PCE data, and a busy week of earnings for further direction.

Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
CURRENCIES					
EURUSD	1.14089	0.37%	-0.05%	-0.11%	-2.83%
GBPUSD	1.33585	0.38%	-0.54%	0.76%	-0.75%
AUDUSD	0.70003	0.39%	0.05%	1.65%	4.91%
NZDUSD	0.57965	0.13%	-0.74%	2.61%	0.70%
USDJPY	163.533	-0.15%	0.64%	0.98%	4.33%
USDCAD	1.40766	-0.11%	0.05%	-0.95%	2.59%
METALS					
XAUUSD	4103.92	1.28%	2.39%	2.18%	-5.00%
SILVER	59.621	2.83%	5.73%	2.32%	-16.33%
PLATIN	1632.5	2.09%	1.78%	2.52%	-21.14%
INDICES					
S&P 500	7463.33	0.69%	0.27%	0.31%	9.03%
DOW JONES	52224	0.53%	0.74%	0.08%	8.66%
NASDAQ	28455	1.16%	-0.52%	-4.43%	12.69%
NIKKEI	64670	0.09%	-2.36%	-6.91%	28.47%
DAX	25245	0.58%	1.60%	2.51%	3.08%
ENERGY					
CRUDE OIL	85.501	-5.49%	3.66%	20.85%	48.90%
BRENT OIL	93.126	-5.34%	4.38%	26.00%	53.04%
NATURAL GAS	2.803	-2.75%	-1.99%	-11.88%	-23.96%
BONDS					
US 10Y	4.6430	0.0440	0.05%	0.26%	0.47%
DE 10Y	3.1728	0.0387	0.05%	0.31%	0.31%
JAPAN 10Y	2.7620	0.0543	0.03%	0.12%	0.69%
UK 10Y	32.6500	0.0100	0.69%	1.88%	5.49%
CHINA 10Y	6.8180	0.0060	0.06%	0.05%	0.25%

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EURUSD

The euro traded at $1.1411, up 0.14%, holding above the key $1.1400 level after a bullish gap. The ECB left rates unchanged while signaling a likely September hike, as higher oil and gas prices kept inflation concerns alive.

Strong Eurozone PMI data also supported the currency despite a firmer dollar.

The first resistance is at 1.1430, while support begins at 1.1380.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1474	1.1450	1.1430	1.1380	1.1350	1.1320

XAUUSD

Gold rose 1% toward $4,100, rebounding from a nine-month low as oil prices fell after the US and Iran paused hostilities over the weekend. The US halted its strike campaign, while Iran suspended retaliatory attacks and resumed talks with Oman over the Strait of Hormuz.

The Fed is expected to leave rates unchanged this week, with markets still anticipating a September hike.

First resistance is at $4,140, with initial support near $4,060.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
4280	4200	4140	4060	4000	3950

USDJPY

The yen strengthened to around 163.5 per dollar as the dollar and oil prices retreated following the pause in US-Iran hostilities. Despite the rebound, the currency remained near a 40-year low, with intervention warnings and expectations of faster BOJ tightening doing little to reverse its broader weakness.

Japan's dependence on Middle East oil and domestic inflation concerns remained in focus.

First resistance is seen at 164.00, with initial support near 163.20.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
165.00	164.50	164.00	163.20	162.80	162.40

BTCUSD

Bitcoin traded near 65,160, edging higher as $274 million in weekly ETF inflows improved institutional sentiment.

Lower oil prices also eased inflation concerns after the weekend pause in the US-Iran conflict.

First resistance is seen at 65,800, with initial support near 63,700.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
68.500	67.200	65.800	63.700	61.800	60.000

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BRENT OIL

Brent fell as much as 7% below $90 before recovering part of its losses after the US suspended strikes on Iran for a second straight night.

Iran also paused retaliatory operations and resumed talks with Oman, although Houthi forces reported attacks on Saudi Aramco facilities in the Red Sea. Despite the pullback, oil remains up nearly 40% this month.

Resistance is seen at 90.00, while the nearest support stands at 86.40.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
94.00	92.30	90.00	86.40	84.40	82.00

NASDAQ

The Nasdaq-100 rose 1.22% to 28,474 as easing geopolitical tensions and lower oil prices improved sentiment.

Chipmakers led the AI recovery, while earnings from major technology companies and this week's Fed decision remain the key drivers.

Resistance stands at 28,650, while the nearest support is located at 28,320.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
$29.220	$29.000	$28.650	$28.320	$28.100	$28.000

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USDCNH

USD/CNY traded around 6.7700 as traders assessed the PBOC's liquidity measures and China's growth outlook. The central bank set a slightly stronger daily fixing at 6.7911 and injected CNY 500 billion through its MLF facility.

While property sector concerns persist, the yuan remains close to its strongest level of the past year.

Resistance stands at 6.7750 while the nearest support is located at 6.7600.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
6.7940	6.7870	6.7750	6.7600	6.7500	6.7370

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