DAILY ANALYSIS

27 August 2026

Economic Calendar

Time	Cur.	Event	Forecast	Previous
12:30	USD	Initial Jobless Claims	208K	206K
12:30	USD	Goods Trade Balance (Jul)	-100.80B	-101.41B
12:30	USD	Continuing Jobless Claims	1.790K	1.799K

Hormuz May Not Be Clear Yet

Allied officials privately warn that dozens of Iranian mines may remain in the Strait of Hormuz, contradicting claims that the waterway was fully cleared. Iran and Oman are discussing an interim corridor for mine removal and resumed shipping, while commercial vessels remain exposed to drone and missile attacks and Brent stays sensitive to renewed tensions.

US stock futures rose after Nvidia's strong sales outlook reinforced confidence in AI demand through 2028. Nasdaq 100 futures gained 1%, while the Dow and S&P 500 added 0.5%. Nvidia jumped 4% postmarket, Salesforce climbed 13%, and Okta surged 20% on agentic AI demand. Workday, Autodesk, and MongoDB report next.

The US 10-year Treasury yield rose to 4.66% as July PCE inflation increased 0.2% MoM, above forecasts, with the annual rate at 3.7%. Stronger data strengthened Fed hike expectations before Warsh's Jackson Hole speech Friday, while Druckenmiller criticized expanded Treasury buybacks for undermining market credibility.

The Dollar Index held above 99, supported by hotter PCE data and stronger Fed hike expectations. Oil fell on progress in Middle East diplomacy, while Treasury buybacks and US fiscal concerns remained part of the currency outlook.

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Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
CURRENCIES					
EURUSD	1.1654	0.02%	-0.21%	2.34%	-0.74%
GBPUSD	1.35893	-0.04%	-0.30%	2.26%	0.96%
AUDUSD	0.71839	0.19%	0.99%	3.00%	7.66%
NZDUSD	0.59489	0.07%	0.12%	2.82%	3.35%
USDJPY	159.345	0.02%	0.19%	-2.74%	1.65%
USDCAD	1.38838	0.05%	0.68%	-1.59%	1.19%
METALS					
XAUUSD	4603.32	0.21%	1.94%	14.27%	6.56%
SILVER	68.739	0.95%	0.98%	20.39%	-3.54%
PLATIN	1843.8	-0.04%	0.26%	13.58%	-10.93%
INDICES					
S&P 500	7693.43	0.23%	0.68%	3.56%	12.39%
DOW JONES	53563	0.19%	1.52%	1.55%	11.44%
NASDAQ	29273	0.17%	0.20%	5.44%	15.93%
NIKKEI	66064	-0.30%	-0.23%	5.93%	31.24%
DAX	26343	0.22%	1.39%	3.45%	7.56%
ENERGY					
CRUDE OIL	81.38	-1.03%	-6.28%	2.67%	41.73%
BRENT OIL	87.108	-0.83%	-7.11%	6.13%	43.15%
NATURAL GAS	2.9278	1.87%	7.13%	8.40%	-20.57%
BONDS					
US 10Y	4.6570	0.0040	-0.05%	0.05%	0.49%
DE 10Y	3.2329	0.0062	-0.02%	0.12%	0.37%
JAPAN 10Y	2.8920	0.0045	0.04%	0.11%	0.82%
UK 10Y	31.9300	0.0600	-0.53%	-0.51%	4.77%
CHINA 10Y	6.8540	0.0030	0.03%	0.09%	0.28%

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EURUSD

The euro traded near $1.165, its highest since mid-May, as oil prices fell on Hormuz reopening hopes following resumed Iran-Oman talks.

Reuters reported ECB policymakers favor a September rate hike but hesitate on further tightening.

Schnabel said rates may rise further if conflict persists, citing inflation risks. Markets price in a 40 bps of additional ECB tightening by year-end.

The first resistance is positioned at 1.1680, while the support starts from 1.1610.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1750	1.1720	1.1680	1.1610	1.1570	1.1540

XAUUSD

Gold traded around $4,610, as investors weighed Fed policy ahead of September's meeting.

Strong July PCE data supported hawkish rate expectations. Markets await Warsh's Jackson Hole speech Friday.

Gold held near three-month highs on debasement-trade hedging against US debt risks. China's Hong Kong gold imports rose 11% monthly.

First resistance is seen at $4680, with initial support near $4585.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
4830	4775	4680	4585	4520	4470

USDJPY

The yen held steady near 159.2 per dollar Thursday amid BOJ policy speculation.

Former board member Adachi expects hikes in September and January. Deputy Governor Himino flagged inflation vigilance.

Governor Ueda will skip Jackson Hole due to scheduling.

First resistance is seen at 159.70, with initial support near 159.00.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
161.50	160.50	159.70	159.00	158.00	157.30

BTCUSD

Bitcoin trades near $78,781, up roughly 25% from its August 17 low of $62,275, as it consolidates near recent highs.

Sentiment remains in "Greed" territory at 65, cooling slightly from yesterday. Derivatives show mild leverage. Institutional inflows continue during bond market volatility and debasement fears, while regulatory clarity around the CLARITY Act supports demand.

First resistance is seen at 80,000, with initial support near 78.000.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
85.000	82.400	80.000	78.000	75.500	72.000

BRENT OIL

Brent crude slipped toward $87, falling for a fourth session on Middle East diplomatic progress. Iran and Oman agreed on Hormuz water-share terms, though Tehran said reopening requires more. Trump claimed 10 million barrels transited Hormuz Tuesday and reiterated mine-clearance claims.

Milder US sanctions on Iran and reported Putin escalation plans in Ukraine also weighed on prices.

Resistance is seen at 87.80, while the nearest support stands at 85.00.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
91.30	89.10	87.80	85.00	83.10	81.00

NASDAQ

Nasdaq 100 holds near 29,450, consolidating in a roughly 400-point range since August 24 as markets await Nvidia's earnings and July PCE inflation data.

Traders expect heightened volatility around the New York open given upcoming Fed commentary and earnings releases.

Both catalysts are likely to shape near-term direction as investors position ahead of the reports.

Resistance stands at 29,650, while the nearest support is located at 29,200.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
$30.200	$29.900	$29.650	$29,200	$28,900	$28,500

USDCNH

The offshore yuan held near 6.72 per dollar Thursday, steadying after Wednesday's dip as weaker industrial profit growth fueled stimulus expectations.

Profits rose 17.6% year-on-year through July, slowing from 18.7% in H1, reflecting demand pressures after July's disappointing output, retail, and investment data.

Investors await the NPC Standing Committee meeting's conclusion on August 28 for policy signals.

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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