

DAILY ANALYSIS

27 October 2026



Economic Calendar

Time	Cur.	Event	Actual	Forecast	Previous
12:30	USD	Durable Goods Orders (MoM) (Sep)	-	1.8%	0.0%
14:00	USD	CB Consumer Confidence (Oct)	-	80.5	81.9
14:00	USD	New Home Sales (Sep)	-	649K	684K

Three Central Banks, Few Easy Choices

The Fed, ECB and BOJ are expected to hold rates this week, but persistent inflation is complicating the outlook. European gas prices have surged more than a third this month, weighing on the euro, while Japan's services inflation reached 3.7%, strengthening the case for a December BOJ hike. The dollar remains supported by expectations of tighter US monetary policy.

Brent slipped below \$115 as diplomatic talks involving Iran, Saudi Arabia, Pakistan and Turkey raised hopes of easing regional tensions. Crude shipments have also recovered to near prewar levels, although continued fighting involving the Houthis and reports of Iranian support for Hezbollah leave supply disruptions a possibility. Lower oil prices offered gold some relief near \$4,010, but inflation concerns continue to limit its recovery.

Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
CURRENCIES					
EURUSD	1.1166	-0.07%	-0.63%	-1.80%	-4.89%
GBPUSD	1.33301	-0.09%	-0.37%	0.57%	-0.96%
AUDUSD	0.70222	0.07%	0.27%	0.06%	5.24%
NZDUSD	0.56927	0.22%	0.12%	0.44%	-1.10%
USDJPY	157.748	0.16%	-0.27%	0.22%	0.64%
USDCAD	1.40229	0.08%	-0.26%	-1.07%	2.20%
METALS					
XAUUSD	4005.65	-0.28%	-2.89%	-2.66%	-7.27%
SILVER	53.166	-1.47%	-8.28%	-12.31%	-25.39%
PLATIN	1508.9	-2.36%	-8.91%	-13.52%	-27.11%
INDICES					
S&P 500	7682.36	0.07%	-0.39%	-0.02%	12.23%
DOW JONES	52497	0.26%	0.00%	1.97%	9.22%
NASDAQ	29232	-0.14%	-0.88%	-3.45%	15.77%
NIKKEI	63380	1.91%	-1.09%	-3.79%	25.91%
DAX	25404	-0.03%	0.39%	0.12%	3.73%
ENERGY					
CRUDE OIL	100.986	-0.76%	3.24%	9.06%	75.87%
BRENT OIL	114.961	-0.73%	5.67%	17.51%	88.93%
NATURAL GAS	2.6013	-0.03%	-12.21%	-16.25%	-29.43%
BONDS					
US 10Y	4.9710	0.0210	-0.14%	-0.27%	0.80%
DE 10Y	3.3554	0.0120	-0.10%	-0.29%	0.49%
JAPAN 10Y	2.7910	0.0056	-0.11%	-0.31%	0.72%
UK 10Y	35.7850	2.7750	2.83%	2.87%	8.63%
CHINA 10Y	7.4800	0.0120	0.12%	0.30%	0.91%

EURUSD



EUR/USD slipped toward 1.1165, falling below 1.1180 as soaring European gas prices and France's fiscal troubles weighed on the currency. Gas prices have climbed more than a third this month, leaving the euro as October's weakest G10 currency.

With the Fed and ECB expected to hold rates on Wednesday and Thursday, comments from Warsh and Lagarde could provide fresh direction for the pair.

The first resistance is positioned at 1.1200, while the support starts at 1.1130.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1300	1.1250	1.1200	1.1130	1.1100	1.1050

XAUUSD



Gold steadied near \$4,010 after touching a three-month low, supported by bargain hunting and a second consecutive decline in oil prices. Diplomatic efforts to ease US-Iran tensions have softened immediate inflation concerns, although high energy costs continue to support expectations of tighter monetary policy.

Upcoming US GDP and PCE figures could also influence gold's recovery.

First resistance is seen at \$4065, with initial support near \$3970.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
4140	4100	4065	3970	3940	3900

USDJPY



The yen weakened beyond 157.5 per dollar, surrendering much of last week's gains as Anthropic's IPO filing revived demand for AI-related assets.

Japan's services inflation reached 3.7% in September, its highest since June 2024, driven by rising labor, transport and fuel costs. The BOJ is expected to hold rates this week, although persistent inflation could strengthen the case for a December hike.

First resistance is seen at 158.00, with initial support near 156.50.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
160.20	159.00	158.00	156.50	154.20	152.50

BTCUSD



Bitcoin slipped 0.42% to \$79,655, extending its four-week decline to 4.60%.

The cryptocurrency has lost 29.46% over the past year, although Trading Economics projects a recovery to \$81,901 by quarter-end and \$90,304 within twelve months.

Initial resistance sits near 81,000, with support around 78,500.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
86.500	84.200	81.000	78.500	76.800	74.500

BRENT OIL



Brent crude extended its decline for a second session, slipping below \$115 a barrel as diplomatic efforts offered a possible route to easing US-Iran tensions. Officials from Saudi Arabia, Pakistan and Turkey reportedly met Iranian representatives to revive negotiations before the US midterms, with Trump signaling that military strikes could resume.

Ongoing Saudi-Houthi conflicts and reports of Iranian support for Hezbollah threaten further regional disruptions, although crude shipments have recovered to near prewar levels.

Resistance is seen at 116.50, while the nearest support stands at 113.60.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
118.30	117.70	116.50	113.60	111.10	108.80

NASDAQ



The Nasdaq 100 gained 1.09% to close at 29,273 as technology shares recovered from recent losses.

Upcoming earnings from major technology companies and the Fed's policy decision could determine the strength of the rebound, particularly as questions surrounding AI spending and profitability influenced sentiment.

Based on the previous session's trading range, immediate resistance can be watched near 29,350, while initial support lies around 29,000.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$30.000	\$29.600	\$29,350	\$29,000	\$28,700	\$28,400

USDCNH



The offshore yuan held near 6.67 per dollar, close to its strongest level since June 2022, supported by solid exports and firmer central bank fixings. China's economy expanded 4.5% year over year in the third quarter, recovering from a three-year low and exceeding forecasts despite weak domestic consumption.

September exports surged 36.3% to \$447.18 billion, beating expectations of 25.5% and recording their fastest growth in seven months as demand for AI infrastructure supported Chinese

technology shipments.

The first resistance stands at 6.6850, while support begins at 6.6590.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
6.7350	6.7110	6.6850	6.6590	6.6450	6.6300

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