

# DAILY ANALYSIS

27 NOVEMBER 2025



## Economic Calendar

Time	Cur.	Event	Forecast	Previous
		United States - Thanksgiving Day		

### Euro Advances, Bitcoin Finds Heat Again

Thursday brought a brighter backdrop across major assets as December Fed rate-cut expectations firmed and tech names stayed in focus. EUR/USD extended its advance for a fourth straight day, breaking above 1.1600 to a one-and-a-half-week high, with softer US data and strong easing expectations keeping the dollar under pressure. The Japanese yen also strengthened past 156 per dollar, supported by speculation that Tokyo could consider action during the US Thanksgiving window, a possibility that has already helped limit further weakness without any direct move.

Gold hovered near \$4,150, just below a two-week high, supported by persistent rate-cut pricing and speculation that Kevin Hassett, viewed as a dovish option, could become the next Fed chair. Brent crude slipped back under \$63, reversing part of Wednesday's gains as participants waited for clearer signals on supply while Russia, Ukraine talks continued; any eventual easing of sanctions on Russian crude is expected to feed into supply only gradually.

Tech stayed resilient, with the US 100 Tech Index climbing to 25,287, up 0.87% on the day and holding annual gains above 20%, even as forecasts point to a slower pace ahead. Bitcoin firmed to 91,752, a 1.38% daily gain that extended its four-week rise to 18.74%, though the 12-month performance is still slightly negative.

The offshore yuan eased to around 7.07 after the PBoC delivered its first weak fixing since July, a sign that authorities may be trying to temper the currency's recent appreciation.

## Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
<b>CURRENCIES</b>					
EURUSD	1.16022	0.06%	0.64%	-0.42%	12.01%
GBPUSD	1.32583	0.13%	1.41%	-0.09%	5.91%
AUDUSD	0.65307	0.20%	1.41%	-0.82%	5.51%
NZDUSD	0.57251	0.56%	2.36%	-1.06%	2.36%
USDJPY	156.039	-0.28%	-0.91%	2.58%	-0.83%
USDCAD	1.40345	-0.06%	-0.44%	0.63%	-2.39%
<b>METALS</b>					
XAUUSD	4147.27	-0.37%	1.73%	4.94%	58.03%
SILVER	52.874	-0.89%	4.37%	12.21%	83.09%
PLATIN	1614.3	1.68%	7.18%	2.65%	80.57%
<b>INDICES</b>					
S&P 500	6816.16	0.05%	4.24%	-1.08%	15.89%
DOW JONES	47471	0.09%	3.76%	-0.49%	11.58%
NASDAQ	25253	0.06%	4.98%	-2.92%	20.18%
NIKKEI	50062	1.01%	0.48%	-0.31%	25.49%
DAX	23715	-0.05%	1.87%	-2.32%	19.11%
<b>ENERGY</b>					
CRUDE OIL	58.343	-0.52%	-1.11%	-3.01%	-18.65%
BRENT OIL	62.776	-0.56%	-0.95%	-1.65%	-15.90%
NATURAL GAS	4.6151	1.25%	-1.11%	19.35%	27.03%
<b>BONDS</b>					
US 10Y	3.999	0.10%	-0.14%	0.02%	-0.58%
DE 10Y	2.6741	0.13%	-0.04%	0.06%	0.31%
JAPAN 10Y	1.799	2.02%	-0.02%	0.16%	0.71%
UK 10Y	4.427	7.20%	-0.17%	0.02%	-0.14%
CHINA 10Y	6.489	2.20%	-0.03%	-0.04%	-0.30%

## EURUSD



EUR/USD extended its advance for a fourth straight session on Thursday, moving above 1.1600 and reaching its highest level in about a week and a half during Asian trading. The ECB is still expected to keep rates unchanged through 2026, reflecting steady economic conditions and inflation that is nearing its target.

Officials described the bank as “in a good position,” while acknowledging persistent price pressures in food and services. Joachim Nagel added that the central bank should stay alert.

For EUR/USD, 1.1510 serves as key support, with resistance located near 1.1625.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1750	1.1670	1.1625	1.1510	1.1420	1.1390

## XAUUSD



Gold softened modestly toward \$4,150 per ounce on Thursday but remained close to a two-week peak.

Sentiment was further improved by reports that Kevin Hassett, chief economic adviser to President Donald Trump, has emerged as the frontrunner for the next Fed chair, a development that could steer the central bank toward a more dovish policy path.

Gold finds support near \$4090, while resistance is positioned around \$4200.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
4380	4240	4200	4090	4010	3950

## BTCUSD



Bitcoin traded at 91,752 dollars on Thursday, rising 1.38% from the previous session.

Kronos Research CIO Vincent Liu described the move as a “classic oversold rebound,” adding that the roughly 80% probability of a Federal Reserve rate cut in December has helped support risk appetite.

BTC/USD is currently testing resistance at 93.600, with support at 88.000.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
105.500	97.260	93.600	88.000	84.000	77.500

## USDJPY



The yen strengthened past 156 per dollar, recovering earlier losses as attention stayed fixed on the possibility of Japanese authorities stepping into the market. The US Thanksgiving break is viewed as a potential opening for intervention, and repeated signals from officials have already helped limit further weakness.

From a technical view, resistance is located near 158.95, while support holds around 155.20.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
161.20	160.15	158.95	155.20	153.65	151.60

## BRENT OIL



Brent crude dropped back under \$63 per barrel, giving up part of the previous session's 1% advance.

A US presidential envoy is set to travel to Russia next week for further negotiations, and a breakthrough could eventually ease sanctions on Russian crude. However, doubts remain about the likelihood of a near-term agreement, and even if one is reached, analysts expect Russian oil flows would take time to recover.

Brent's resistance stands at 65.20, while the nearest support level is near 60.20.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$68.00	\$66.80	\$65.20	\$60.20	\$59.10	\$58.25

## NASDAQ



The Nasdaq Index climbed to 25,287, an increase of 0.87% compared with the day before. The index shows a 2.79% rise over the past month and a strong 20.81% increase across the past 12 months.

Nasdaq faces resistance near 25,600, while support holds around 24,235.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$26,300	\$25,950	\$25,600	\$24,235	\$22,800	\$20,680

## USD/CNH



The offshore yuan eased to around 7.0750 per dollar, sliding from the thirteen-month high it hit in the previous session after the People's Bank of China delivered its first underperforming fixing in months.

The PBoC set Thursday's midpoint at 7.0779, slightly softer than Reuters' estimate of 7.0733. This marked the first downside surprise since July 1, a signal that policymakers may be trying to slow the yuan's rapid appreciation and prevent excessive short-term gains.

USD/CNH is testing resistance at 7.1020, with support positioned near 7.0690.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
7.1340	7.1280	7.1020	7.0690	7.0610	7.0500

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