DAILY ANALYSIS

28 September 2026

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Economic Calendar

Time	Cur.	Event	Forecast	Previous
13:30	EUR	ECB President Lagarde Speaks		

Gold Takes a Hit From Oil

Gold fell below $4,250 to a seven-week low as stalled US-Iran talks kept oil prices high and reinforced inflation concerns. Several Fed officials pointed to resilient growth and a strong labor market as reasons for further hikes, while attention now moves to the Fed's preferred inflation measure and key US jobs data.

The dollar stayed firm as expectations for further Fed tightening and high Treasury yields weighed on major currencies. EUR/USD slipped to 1.1391, down 1.95% over the past month, while the yen weakened toward 158 per dollar despite growing speculation that the BOJ could hike again in October.

Brent rebounded above $106 after Trump rejected Iran's latest proposal to reopen the Strait of Hormuz. Tehran said it would not ease its conditions, leaving uncertainty over when oil flows through the waterway could fully resume.

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Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
CURRENCIES					
EURUSD	1.13809	-0.10%	-0.73%	-2.04%	-3.06%
GBPUSD	1.3237	-0.08%	-0.97%	-2.30%	-1.66%
AUDUSD	0.70206	-0.03%	-1.37%	-2.04%	5.21%
NZDUSD	0.56658	0.07%	-0.86%	-4.21%	-1.57%
USDJPY	157.729	0.30%	0.24%	-1.26%	0.62%
USDCAD	1.41559	0.10%	0.86%	2.18%	3.17%
METALS					
XAUUSD	4180.45	-2.44%	-3.74%	-5.87%	-3.23%
SILVER	61.648	-4.06%	-6.60%	-7.32%	-13.49%
PLATIN	1719.4	-3.27%	-4.55%	-4.17%	-16.94%
INDICES					
S&P 500	7711.72	-0.41%	-0.68%	0.33%	12.65%
DOW JONES	51596	-0.45%	-0.87%	-2.99%	7.35%
NASDAQ	30355	-0.83%	-0.42%	3.05%	20.22%
NIKKEI	66186	-0.27%	1.03%	-0.19%	31.48%
DAX	25452	0.17%	-0.48%	-3.07%	3.93%
ENERGY					
CRUDE OIL	94.317	2.06%	2.11%	9.98%	64.26%
BRENT OIL	107.507	3.05%	7.14%	18.81%	76.68%
NATURAL GAS	3.1264	-2.18%	10.24%	6.52%	-15.18%
BONDS					
US 10Y	5.2140	0.0490	0.26%	0.46%	1.04%
DE 10Y	3.6210	0.0096	0.10%	0.39%	0.76%
JAPAN 10Y	3.0940	0.0216	0.10%	0.15%	1.02%
UK 10Y	32.7700	0.1300	0.19%	0.84%	5.61%
CHINA 10Y	7.1120	0.0020	0.05%	0.26%	0.54%

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EURUSD

The EUR/USD exchange rate slipped to 1.1391, down 0.01% from the prior session. Over the past month, the euro has weakened 1.95% against the dollar, and it is down 2.90% over the last 12 months.

The first resistance is positioned at 1.1400 while the support starts from 1.1350.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1500	1.1450	1.1400	1.1350	1.1320	1.1300

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XAUUSD

Gold fell below $4,250 an ounce to a seven-week low as stalled US-Iran talks kept oil prices high and strengthened expectations for further Fed tightening. Trump rejected Iran's latest proposal to reopen the Strait of Hormuz, though he expects talks to resume this week, while Tehran said it would not ease its conditions. Several Fed officials also pointed to resilient growth and a strong labor market as reasons for more hikes. Cleveland Fed President Beth Hammack said these factors, along with government-debt concerns, were lifting long-term Treasury yields.

Next up are the Fed's preferred inflation measure and key US jobs data for further policy signals.

First resistance is seen at $4200, with initial support near $4150.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
4320	4240	4200	4150	4080	4020

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USDJPY

The yen weakened toward 158 per dollar, giving back some of Friday's 1% gain as a firmer dollar, high Treasury yields and expectations for further Fed tightening weighed on the currency. Rising oil prices added pressure on Japan's import-dependent economy.

Friday's rally followed Finance Minister Satsuki Katayama's comments that Trump had raised concerns about the yen with Prime Minister Sanae Takaichi. Katayama also pledged continued coordination with US Treasury Secretary Scott Bessent, following the first joint US-Japan yen-buying intervention since 1998 in late July. Meanwhile, a former BOJ official said the central bank could deliver a second consecutive hike in October as inflation risks persist.

First resistance is seen at 159.50, with initial support near 157.70.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
162.50	161.10	159.50	157.70	156.20	155.00

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BTCUSD

Bitcoin traded at 83,616 against the US dollar, down 1.00% from the prior session.

Over the past four weeks it has lost 6.88%, and over the last 12 months it is down 26.91%. Trading Economics' global macro models and analyst estimates forecast Bitcoin at 84,180 by quarter-end and 95,059 in a year.

Initial resistance sits near 85,500, with support around 83,000.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
89.000	87.000	85.500	83.000	81.500	80.000

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BRENT OIL

Brent crude rose above $106 a barrel, recovering the prior session's losses after Trump rejected Iran's latest proposal to reopen the Strait of Hormuz, stoking fears that the return of oil flows through the vital waterway could be further delayed. Trump also said Tehran had overplayed its hand and expects talks to resume this week.

Iran, for its part, said it was awaiting a definitive US response to its seven-day proposal to reopen the strait and other demands, adding it would not ease its conditions after Trump rejected the plan.

Resistance is seen at 100.50, while the nearest support stands at 96.00.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
103.70	102.00	100.50	96.00	94.50	92.00

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NASDAQ

The US 100 Tech Index traded at 30,392, up 0.42% from the previous session.

The index has gained 3.17%, and over the last 12 months it has risen 23.49%. Trading Economics' global macro models and analyst estimates project the index at 29,947 by quarter-end and 28,048 in a year.

Resistance stands at 30,700, while the nearest support is located at 30,200.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
$31.200	$31.000	$30.700	$30,200	$30,000	$29,700

USDCNH

The offshore yuan weakened to around 6.72 per dollar, its fourth straight session of losses as traders assessed outcomes from the Trump-Xi summit in Washington.

Artificial intelligence took a central role in Thursday's White House meeting, with Trump and Xi discussing how to manage competition in the fast-growing sector. Trump reiterated his opposition to tighter AI regulation, while Xi said both countries had a "capability and responsibility" to keep the technology under human control.

Xi also urged the US to explicitly oppose Taiwan independence, his first public call for Trump to reconsider Washington's longstanding position on the island. With no official readout released yet, Trump's response remains unclear.

Resistance stands at 6.7250 while the nearest support is located at 6.7050.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
6.7580	6.7450	6.7250	6.7050	6.6880	6.6790

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