

DAILY ANALYSIS

30 September 2026



Economic Calendar

Time	Cur.	Event	Actual	Forecast	Previous
01:30	CNY	Manufacturing PMI (Sep)	50.7	50.1	49.8
06:00	GBP	GDP (QoQ) (Q2)	0.5%	0.4%	0.6%
06:00	GBP	GDP (YoY) (Q2)	1.4%	1.2%	0.9%
12:15	USD	ADP Nonfarm Employment Change (Sep)		73K	38K
12:30	USD	Core PCE Price Index (YoY) (Aug)		3.4%	3.3%
12:30	USD	Core PCE Price Index (MoM) (Aug)		0.3%	0.2%
12:30	USD	GDP (QoQ) (Q2)		1.5%	2.1%
14:30	USD	EIA Crude Oil Inventories			2.969M

Treasury Yields Keep Gold in Check

Gold held near \$4,180, but the 30-year Treasury yield hitting 5.62%, its highest since 2002, limited the recovery. Fed official John Williams also left the door open to another rate hike later this year, putting gold on course for a nearly 6% September loss.

Brent traded near \$96 as Middle East exports recovered to 98% of pre-war levels, while the US prepared to release up to 40 million barrels from reserves. Despite the pullback, crude is heading for a third consecutive monthly gain.

The US 100 gained 0.21% to 30,345, extending its four-week advance to 3.01%. Bitcoin slipped 0.38% to \$83,313, leaving it down around 6% over the past month.

Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YTD
CURRENCIES					
EURUSD	1.13502	0.07%	-0.28%	-2.30%	-3.33%
GBPUSD	1.32568	0.18%	0.13%	-2.16%	-1.51%
AUDUSD	0.69792	-0.09%	-0.85%	-2.62%	4.59%
NZDUSD	0.56567	0.26%	-0.30%	-4.37%	-1.73%
USDJPY	156.929	-0.23%	-0.88%	-1.76%	0.11%
USDCAD	1.41796	-0.07%	0.54%	2.35%	3.34%
METALS					
XAUUSD	4388.77	1.09%	0.88%	-2.86%	1.60%
SILVER	66.667	2.26%	3.74%	-0.39%	-6.45%
PLATIN	1814.6	1.13%	0.95%	0.23%	-12.34%
INDICES					
S&P 500	7662.82	0.33%	0.08%	-0.59%	11.94%
DOW JONES	51930	0.29%	-1.22%	-2.87%	8.05%
NASDAQ	29556	0.37%	0.64%	0.44%	17.05%
NIKKEI	65075	1.46%	1.66%	-0.38%	29.27%
DAX	25668	-0.19%	0.39%	-1.62%	4.81%
ENERGY					
CRUDE OIL	100.785	-1.10%	0.73%	19.43%	75.52%
BRENT OIL	103.293	-1.46%	-1.26%	12.74%	69.75%
NATURAL GAS	2.8623	-1.33%	1.11%	1.72%	-22.35%
BONDS					
US 10Y	5.2240	0.0250	0.11%	0.47%	1.05%
DE 10Y	3.6272	0.0129	0.08%	0.30%	0.76%
JAPAN 10Y	3.0660	0.0241	0.08%	0.12%	0.99%
UK 10Y	32.9000	0.0200	0.38%	1.02%	5.74%
CHINA 10Y	7.1740	0.0090	0.14%	0.22%	0.60%

EURUSD



The euro fell toward \$1.133, its lowest level since May 2025, as a stronger dollar and expectations for a slower ECB tightening path weighed on the currency.

Weak growth and upcoming elections in France, Spain and Italy add another layer of uncertainty, although traders still price in as many as four ECB hikes over the next year, beginning in December.

The first resistance is positioned at 1.1361, while the support starts from 1.1301.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1450	1.1400	1.1361	1.1301	1.1280	1.1260

XAUUSD



Gold held near \$4,180 after recovering in the previous session, helped by softer oil prices. The rebound remained limited, however, as the 30-year Treasury yield reached 5.62%, its highest since June 2002, with persistent inflation concerns keeping pressure on the metal.

New York Fed President John Williams said another rate increase late this year may be warranted, pointing to the Middle East conflict and AI-driven growth as potential sources of inflation. The metal is now heading for a nearly 6% decline in September.

First resistance is seen at \$4230, with initial support near \$4140.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
4320	4290	4230	4140	4110	4080

USDJPY



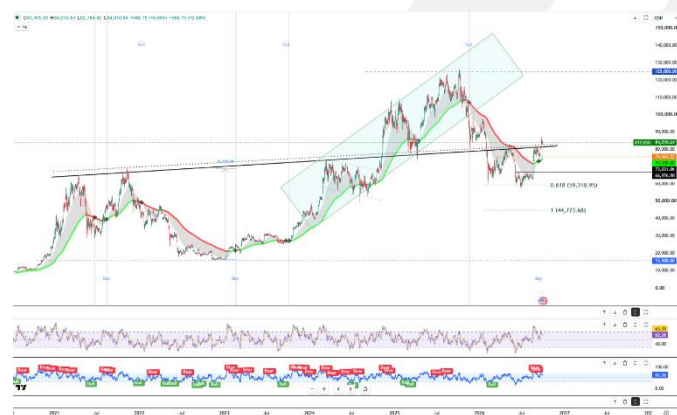
The yen strengthened past 157 per dollar after Japanese officials warned against excessive currency weakness and said they were coordinating with the US.

The recovery remains constrained by the wide gap between US and Japanese interest rates, which continues to favor the dollar.

First resistance is seen at 159.50, with initial support near 155.00.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
162.50	161.10	159.50	155.00	153.40	152.60

BTCUSD



Bitcoin slipped 0.38% to \$83,313, extending its monthly decline to around 6%, while losses over the past year approach 30%.

Trading Economics forecasts the cryptocurrency at \$84,180 by quarter-end and \$95,059 in 12 months.

Initial resistance sits near 84,500, with support around 81,600.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
90.000	87.400	84.500	81.600	80.400	78.500

BRENT OIL



Brent held near \$96 after a sharp decline as Middle East exports recovered to 98% of pre-war levels and the US prepared to release up to 40 million barrels from its reserves. Saudi Arabia's East-West pipeline is operating at around half capacity, while US crude inventories increased by 1 million barrels.

Despite the pullback, Brent is heading for a third consecutive monthly gain, reflecting the impact of the US-Iran conflict on oil prices throughout the period.

Resistance is seen at 98.70, while the nearest support stands at 94.30.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
102.00	100.50	98.70	94.30	92.40	91.30

NASDAQ



The US 100 Tech Index rose 0.21% to 30,345, taking its four-week gain to 3.01% and its 12-month advance to 22.35%.

Analysts predict the index to be at 29,947 by quarter-end and 28,048 in 12 months.

Resistance stands at 31.000, while the nearest support is located at 30,200.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$31.200	\$31.100	\$31.000	\$30,200	\$29,250	\$27,800

USDCNH



The yuan held near 6.70 per dollar after China's Composite PMI climbed to 50.7, its highest since December 2025, alongside the announcement of new stimulus measures.

The currency is also on track for its seventh consecutive quarterly gain.

The first resistance stands at 6.7210, while support begins at 6.6940.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
6.7580	6.7450	6.7210	6.6940	6.6880	6.6790

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