

DAILY ANALYSIS

09 JUNE 2025



Economic Calendar

Time	Cur.	Event	Forecast	Previous
01:30	CNY	CPI (YoY) (May)	-0.1% (Act)	-0.10%
09:00	EUR	ECB's Elderson Speaks		
15:00	USD	NY Fed 1-Year Consumer Inflation Expectations (May)		3.60%
17:00	USD	Atlanta Fed GDPNow (Q2)	3.80%	3.80%

US Treasury and Global Bond Yields Steady as Key Talks Begin

The US 10-year Treasury yield held near 4.5% on Monday as markets awaited critical data and trade updates. President Trump confirmed US-China officials will meet in London today after a positive call with President Xi. Talks aim to resolve tariff issues and resume rare earth exports. While some approvals have been granted, key details remain unclear. Trump warned tariffs could rise to 145% if no deal is reached. The agenda may also cover Huawei restrictions and student visa policies. Investors now await US CPI on Wednesday, PPI on Friday, and consumer sentiment data for more insight into the economic outlook.

China's 10-year yield stayed near 1.69%, as export approvals and resumed Boeing deliveries supported sentiment. However, ongoing deflation pressures and soft trade figures weighed on the outlook, despite a \$103B trade surplus.

Japan's 10-year yield climbed above 1.47% after revised GDP showed flat Q1 growth and strong bond auction demand. Expectations of gradual policy tightening also supported yields, with the BOJ signaling reduced bond buying ahead.

The US dollar rose Friday after strong May payrolls, though broader data suggested continued economic fragility.

Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YoY
CURRENCIES					
EURUSD	1.14215	0.23%	-0.17%	3.04%	10.26%
GBPUSD	1.35561	0.23%	0.09%	2.89%	8.28%
AUDUSD	0.65138	0.35%	0.28%	2.21%	5.24%
NZDUSD	0.60362	0.36%	0.02%	3.08%	7.92%
USDJPY	144.407	-0.32%	1.18%	-2.73%	-8.23%
USDCAD	1.36849	-0.08%	-0.21%	-2.07%	-4.82%
METALS					
XAUUSD	3314.33	0.08%	-1.99%	2.40%	26.29%
SILVER	36.09	0.31%	3.83%	10.82%	24.97%
PLATIN	1194.4	1.89%	12.55%	22.58%	33.60%
INDICES					
S&P 500	5991.11	-0.15%	0.93%	2.51%	1.86%
DOW JONES	42708	-0.13%	0.95%	0.70%	0.39%
NASDAQ	21710	-0.24%	1.01%	4.03%	3.32%
NIKKEI	38085	0.91%	1.64%	1.17%	-4.54%
DAX	24268	-0.15%	1.41%	2.98%	21.89%
ENERGY					
CRUDE OIL	64.515	-0.10%	3.19%	4.14%	-10.05%
BRENT OIL	66.443	-0.04%	2.81%	2.28%	-10.98%
NATURAL GAS	3.7463	-1.00%	1.42%	2.75%	3.12%
BONDS					
US 10Y	4.498	1.40%	0.05%	0.02%	-0.08%
DE 10Y	2.562	2.45%	0.05%	0.09%	0.20%
JAPAN 10Y	1.471	1.18%	-0.04%	0.08%	0.38%
UK 10Y	4.652	2.67%	0.00%	0.19%	0.08%
CHINA 10Y	1.691	0.10%	-0.01%	0.04%	0.01%

EURUSD



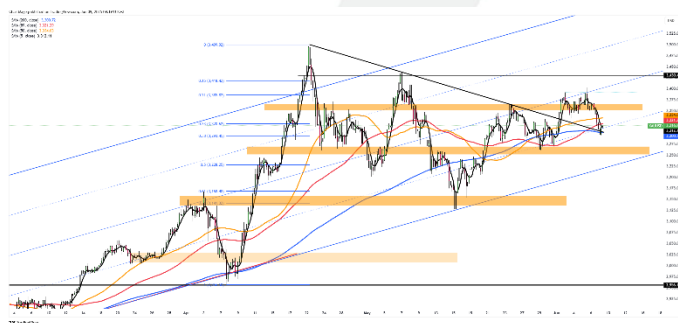
EUR/USD hovered around 1.1400 in Monday's Asian session after earlier losses, weighed by stronger US jobs data. May nonfarm payrolls rose by 139,000, beating forecasts, though below April's revised 147,000. Unemployment held at 4.2%, and wage growth remained at 3.9%, both above expectations.

Attention now shifts to US-China trade talks in London. ECB officials signaled the rate-cut cycle is nearing its end but warned that US tariffs could threaten eurozone growth. President Lagarde emphasized the outlook remains uncertain.

The key resistance is located at 1.1460 and the first support stands at 1.1320.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1580	1.1500	1.1460	1.1320	1.1260	1.1210

XAUUSD



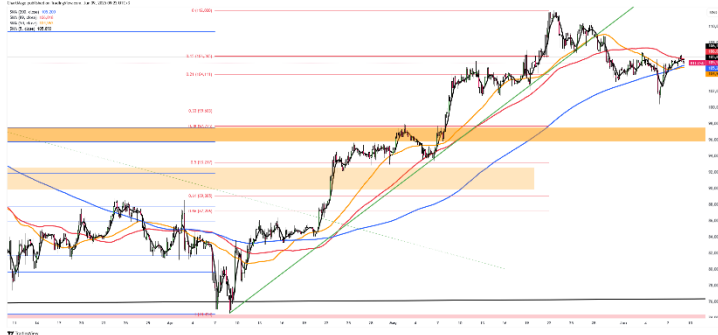
Gold hovered near \$3,310 per ounce on Monday, stabilizing after recent losses. Markets focused on upcoming US-China trade talks in London following a Trump-Xi call. A solid US jobs report reduced recession worries and lowered expectations for immediate Fed rate cuts.

Meanwhile, geopolitical concerns persisted as Russia escalated attacks on Ukraine.

The first critical support for gold is seen at \$3290 and the first resistance is located at \$3352.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
3430	3392	3352	3290	3250	3220

BTCUSD



Bitcoin traded near \$105,500 on Monday morning.

The initial target is \$112,000, with bullish sentiment likely to persist if the price remains above \$106,200.

The first critical support for BTC/USD is seen at the \$100,500 and the first resistance is located at \$106,200.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$112,200	\$109,200	\$106,200	\$100,500	\$97,500	\$93,500

USDJPY



The yen strengthened past 144.5 per dollar on Monday after Japan's Q1 GDP was revised to flat, improving from a 0.2% contraction but reflecting a sharp slowdown from the previous quarter's growth. The current account surplus narrowed more than expected, adding pressure.

Meanwhile, Bank of Japan Governor Ueda reiterated a willingness to raise rates if forecasts hold, as markets turned attention to upcoming US-China trade talks in London.

The key resistance is at \$144.70 meanwhile the major support is located at \$142.50.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
148.15	146.10	144.70	142.50	142.10	141.50

BRENT OIL



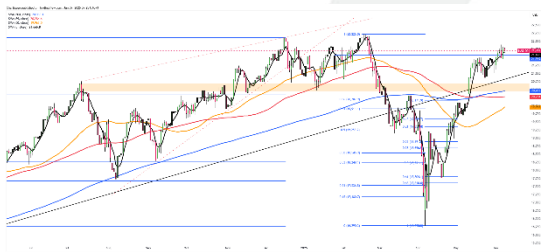
Brent crude fell to \$66.4 on Monday but retained much of last week's advance, supported by stronger US jobs data and hopes for progress in US-China trade talks.

At the same time, escalating geopolitical tensions following Russia's large-scale attack on Ukraine raised concerns about potential energy supply disruptions, offering additional support to oil prices.

Key resistance is at \$66.70 meanwhile the major support is located at \$65.40 per barrel.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$70.00	\$68.60	\$66.70	\$65.40	\$63.20	\$62.40

NASDAQ



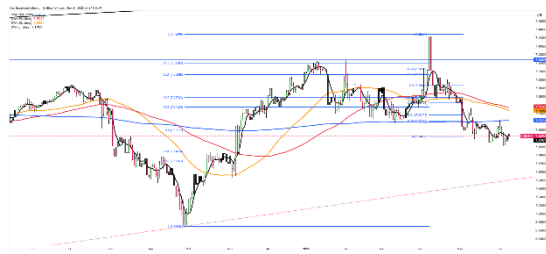
US stock futures held steady on Monday as investors awaited US-China trade talks in London and key inflation data set for release midweek. Attention also turned to Apple's 2025 Worldwide Developers Conference.

Major indexes ended last week with a second consecutive weekly gain, reflecting cautious optimism amid ongoing economic and geopolitical developments.

The first resistance is at \$21,950 while the initial support stands at \$21,150

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$23,000	\$22,200	\$21,950	\$21,150	\$20,700	\$20,300

USDCNH



The offshore yuan appreciated to approximately 7.18 per dollar on Monday, recovering from a two-day decline amid renewed optimism over US-China trade relations. Sentiment improved with temporary export approvals and resumed Boeing deliveries to China.

However, the currency's advance was limited by ongoing deflationary pressures and weak trade figures, reflecting muted domestic demand.

Key resistance is at \$7.1910 meanwhile the major support is located at \$7.1625.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
7.2500	7.2230	7.1910	7.1625	7.1490	7.1260

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🌐 zitaplus.com

✉ support@zitaplus.com

☎ +971 4 287 1454

📞 +44 74 42 66 7878

📍 The H Hotel Office Tower,
One Sheikh Zayed Road, 18th floor,
Office No:1803, Dubai, United Arab Emirates

