

DAILY ANALYSIS

13 JUNE 2025



Economic Calendar

Time	Cur.	Event	Forecast	Previous
06:00	EUR	German CPI (YoY) (May)	2.1%(Act)	2.1%
14:00	USD	Michigan 1-Year Inflation Expectations (Jun)	-	6.6%
14:00	USD	ECB's Elderson Speaks	-	-

US and Japan 10-Year Yields Hit 5-Week Lows

The yield on the US 10-year Treasury note dropped to around 4.34% on Friday, marking its lowest level in five weeks, as investors sought safe-haven assets following Israel's preemptive strike on Iran's nuclear facilities. While US officials confirmed that the US was not involved, the escalation unsettled global markets. Earlier in the week, yields were already trending lower due to growing uncertainty around trade policy after President Trump threatened unilateral tariffs to secure new trade deals. Additionally, soft consumer and producer inflation data further supported expectations of Fed rate cuts later this year.

Similarly, Japan's 10-year government bond yield fell to around 1.4%, also a five-week low, as heightened geopolitical risks and global economic concerns drove demand for safer assets. Bank of Japan Governor Kazuo Ueda reiterated earlier this week that the central bank remains prepared to raise interest rates again if there is sufficient confidence that inflation will sustainably reach the 2% target.

Meanwhile, the US Dollar Index bounced back above 98.2 on Friday, recovering from multi-year lows as rising Middle East tensions increased demand for safe-haven currencies. The dollar had previously been under pressure due to concerns about Trump's aggressive trade policies and disappointing inflation figures, which reinforced market expectations of more rate cuts from the Federal Reserve. Investors are now looking ahead to the University of Michigan's June consumer sentiment report for further insight into how tariff concerns are affecting household confidence.

Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YoY
CURRENCIES					
EURUSD	1.15329	-0.44%	1.20%	3.21%	11.34%
GBPUSD	1.35362	-0.57%	0.08%	2.10%	8.13%
AUDUSD	0.64781	-0.84%	-0.20%	0.78%	4.66%
NZDUSD	0.60151	-0.81%	0.01%	1.98%	7.55%
USDJPY	143.522	0.03%	-0.93%	-2.20%	-8.79%
USDCAD	1.36397	0.26%	-0.41%	-2.45%	-5.13%
METALS					
XAUUSD	3422.79	1.09%	3.36%	7.43%	30.42%
SILVER	36.279	-0.17%	0.83%	12.62%	25.62%
PLATIN	1268.2	-1.12%	8.18%	29.62%	41.86%
INDICES					
S&P 500	5957.45	-1.45%	-0.72%	1.10%	1.29%
DOW JONES	42410	-1.30%	-0.83%	0.85%	-0.32%
NASDAQ	21573	-1.55%	-0.87%	1.19%	2.67%
NIKKEI	37785	-1.02%	0.12%	-0.90%	-5.29%
DAX	23403	-1.55%	-3.71%	-0.53%	17.55%
ENERGY					
CRUDE OIL	73.403	7.88%	13.66%	16.24%	2.35%
BRENT OIL	74.24	7.04%	11.69%	12.33%	-0.54%
NATURAL GAS	3.5368	1.28%	-6.53%	1.28%	-2.65%
BONDS					
US 10Y	4.33	3.80%	-0.18%	-0.21%	-0.25%
DE 10Y	2.436	4.20%	-0.13%	-0.26%	0.07%
JAPAN 10Y	1.409	5.09%	-0.05%	-0.05%	0.32%
UK 10Y	4.482	6.90%	-0.14%	-0.19%	-0.09%
CHINA 10Y	1.687	0.60%	0.00%	0.02%	0.01%

EURUSD



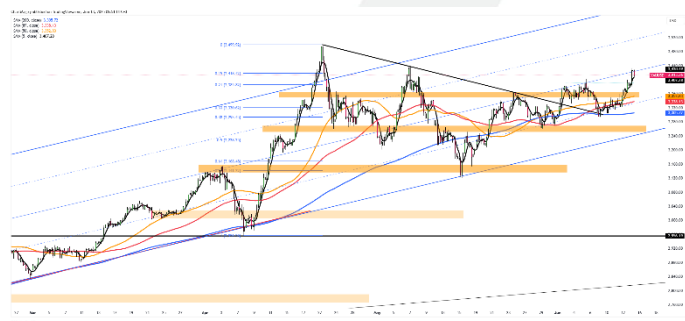
EUR/USD pulled back from 1.1631 to 1.1530 as Middle East tensions supported demand for the US Dollar. Israel struck Iranian sites, raising fears of retaliation. The US distanced itself from the attacks but warned Iran against targeting American interests.

USD gains may still be capped by weak inflation data and Fed rate cut expectations. Markets now await US consumer sentiment data.

Resistance is located at 1.1580, while support is seen at 1.1460

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1700	1.1660	1.1580	1.1460	1.1390	1.1350

XAUUSD



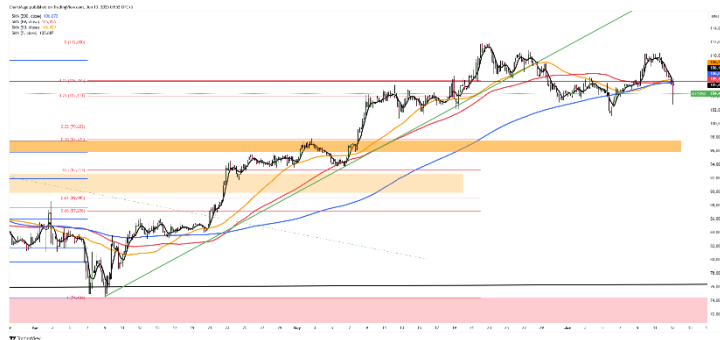
Gold jumped over 1% to above \$3,440, nearing record highs as precious metals demand spiked. The rally followed Israel's strike on Iran's nuclear program, sparking fears of broader conflict. Uncertainty over US tariffs added to the momentum.

Weak US inflation data also supported expectations for Fed rate cuts, further supporting gold as a non-yielding asset.

Resistance is seen at \$3,430, while support holds at \$3,350.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
3600	3500	3430	3350	3300	3250

BTCUSD



Bitcoin dipped to around \$103,700, marking a two-week low as tensions escalated following Israel's strike on Iran and fears of retaliation. Rising trade uncertainty and fresh US tariff threats under Trump further fueled market risk-off sentiment.

At the Coinbase summit, Trump promoted digital finance policies and promised clearer crypto regulations. Weak US economic data also raised expectations for looser Federal Reserve policies, supporting Bitcoin.

The first critical support for BTCUSD is seen at \$104,500, and the first resistance is located at \$112,000.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$125,000	\$120,000	\$112,000	\$104,500	\$100,200	\$95,700

USDJPY



The yen appreciated to around 143 per dollar, rising for a third day as investors sought safety after Israel's preemptive strike on Iran. The attack, targeting nuclear sites, raised global risk aversion. Market uncertainty also grew with Trump's new tariff threats.

Domestically, BoJ Governor Ueda said the bank is ready to raise rates again if inflation approaches its 2% goal.

The key resistance is at \$145.30 while the major support is located at \$142.50.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
148.15	146.10	145.30	142.50	142.10	141.50

BRENT OIL



Brent crude oil jumped to around \$76 per barrel on Friday, its highest level since February, driven by fears of supply disruptions after Israel's preemptive strike on Iran. The escalation fueled concerns over potential retaliation and risks to the Strait of Hormuz, a vital oil transit route.

Bullish sentiment was further supported by US plans to evacuate regional personnel and a drop in US crude inventories. Softer US inflation also lifted expectations of Fed rate cuts, supporting oil demand. Brent is now on track for its strongest weekly gain since February 2022.

Resistance stands at \$76.10, while major support is seen around \$67.50 per barrel.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$78.00	\$77.00	\$76.10	\$71.50	\$69.90	\$67.65

NASDAQ



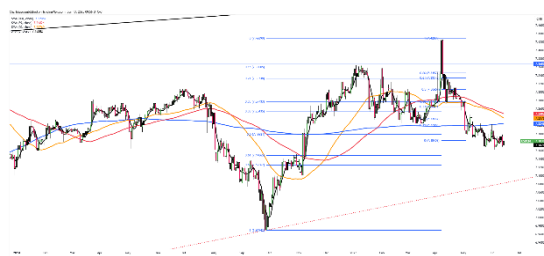
US index futures dropped over 1% on Friday as Israel's strike on Iran intensified regional tensions. Israel declared a state of emergency, citing potential missile and drone attacks, while the US denied any involvement.

Market focus now turns to the June University of Michigan consumer sentiment report amid ongoing trade uncertainty. Softer inflation data has strengthened expectations for more Fed rate cuts this year. Meanwhile, RH shares surged 20% after posting overperforming earnings.

The first resistance is \$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 held steady around 7.19 per dollar as markets evaluated the US-China trade talks in London. The talks produced a framework deal aiming to implement the Geneva consensus, with China expected to ease rare earth export curbs and the US considering loosening tech export restrictions.

Final approval from both leaders is pending. Investors now await key Chinese economic data next week.

Key resistance is at \$7.1910, while 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

