

DAILY ANALYSIS

27 MAY 2025



Economic Calendar

Time	Cur.	Event	Forecast	Previous
12:30	USD	Durable Goods Orders (MoM) (Apr)	-7.9%	9.2%
14:00	USD	CB Consumer Confidence (May)	87.1	86.0

US Debt Worries Lift Yen, Pressure Oil

On Tuesday, the 10-year U.S. Treasury yield fell below 4.5% for the third straight session, as investors grew increasingly cautious amid fiscal and trade uncertainty. Market focus has now shifted to the Senate, where debates are set to begin on President Trump's sweeping tax and spending plan, an initiative the Congressional Budget Office projects could add roughly \$3.8 trillion to the national debt over the next decade. At the same time, trade tensions remain elevated after Trump postponed a planned 50% tariff on EU imports from June 1 to July 9.

The Japanese yen strengthened to a four-week high around 142 per dollar, supported by persistent U.S. dollar weakness driven by deficit concerns. Markets are also eyeing the Bank of Japan's next move, after core inflation unexpectedly jumped to 3.5%, the highest level in over two years, reinforcing expectations of further policy tightening. Japan's 10-year bond yield also declined to 1.47%, marking its third drop as demand climbed with global economic uncertainty.

Meanwhile, WTI crude oil futures slipped to about \$61.30 per barrel, pressured by expectations of rising supply. OPEC+ is scheduled to meet this week to finalize production targets for July, with reports suggesting the group could raise output by 411,000 barrels per day. Earlier this month, the alliance agreed to accelerate supply hikes for a second consecutive month in June.

Financial Markets Daily Performance

SYMBOLS	PRICE	DAILY	WEEKLY	MONTHLY	YoY
CURRENCIES					
EURUSD	1.1397	0.09%	1.01%	-0.20%	10.03%
GBPUSD	1.35742	0.08%	1.35%	1.00%	8.43%
AUDUSD	0.6484	-0.03%	0.94%	0.81%	4.76%
NZDUSD	0.59964	-0.06%	1.38%	0.48%	7.21%
USDJPY	142.401	-0.31%	-1.46%	0.25%	-9.50%
USDCAD	1.37311	-0.03%	-1.33%	-0.71%	-4.50%
METALS					
XAUUSD	3340.74	-0.17%	1.52%	0.10%	27.30%
SILVER	33.351	-0.18%	0.78%	0.72%	15.49%
PLATIN	1080.3	-0.06%	2.25%	9.48%	20.84%
INDICES					
S&P 500	5854.99	0.90%	-1.44%	5.90%	-0.45%
DOW JONES	41966	0.87%	-1.67%	4.32%	-1.36%
NASDAQ	21108	0.92%	-1.21%	8.65%	0.46%
NIKKEI	37445	-0.23%	-0.23%	4.48%	-6.14%
DAX	23973	-0.23%	-0.26%	7.64%	20.41%
ENERGY					
CRUDE OIL	61.368	-0.25%	-1.07%	-1.10%	-14.43%
BRENT OIL	64.654	0.20%	-1.11%	-0.21%	-13.38%
NATURAL GAS	3.2869	0.54%	-4.09%	-1.68%	-9.53%
BONDS					
US 10Y	4.488	2.20%	0.00%	0.27%	-0.09%
DE 10Y	2.5595	1.45%	-0.02%	0.05%	0.20%
JAPAN 10Y	1.476	2.03%	-0.05%	0.16%	0.38%
UK 10Y	4.683	0.04%	0.02%	0.17%	0.11%
CHINA 10Y	1.694	0.80%	0.02%	0.04%	0.01%

EURUSD



EUR/USD advanced to \$1.1395 on Tuesday, nearing its highest level since late April, as the U.S. dollar weakened with growing concerns over the fiscal outlook and uncertainty surrounding Trump's tax and spending bill.

The euro was further supported by improved risk sentiment after Trump delayed planned tariffs on EU imports, easing fears of a transatlantic trade dispute. Comments from ECB President Christine Lagarde, hinting the euro could strengthen as a global currency if EU institutions are supported, also added to the euro's momentum. With the dollar still under pressure, EUR/USD may maintain its upward trend in the short term.

The key resistance is located at 1.1425 and the first support stands at 1.1260.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
1.1580	1.1460	1.1425	1.1260	1.1100	1.1050

XAUUSD



Gold hovered around \$3,340 per ounce on Tuesday, steadying after recent losses as demand eased with renewed optimism over US-EU trade relations. Sentiment improved after the EU agreed to accelerate talks, following Trump's decision to postpone a planned 50% tariff until July 9.

The underlying caution persisted due to ongoing concerns about the US fiscal outlook, stalled global trade negotiations, and geopolitical tensions. Investors are now turning their attention to the upcoming FOMC Minutes and PCE inflation data for signals on the Fed's next policy moves.

The first critical support for gold is seen at the \$3270 level, and the first resistance is located at \$3370.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
3500	3440	3370	3270	3150	3025

BTCUSD



Bitcoin is trading around \$109,000 on Monday morning after reaching a fresh all-time high last week.

The first target BTC could reach is \$120,500, and the optimism will continue if the price stays above \$106,200.

The first critical support for BTCUSD is seen at the \$106,200 level, and the first resistance is at \$120,500.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$135,000	\$130,000	\$120,500	\$106,200	\$97,500	\$93,500

USDJPY



The Japanese yen strengthened to around 142 per dollar on Tuesday, reaching a four-week high as the U.S. dollar came under pressure from mounting fiscal concerns. Sentiment was weighed down by Trump's tax and spending plan, projected to significantly widen the U.S. deficit.

Precious metal demand also supported the yen, driven by Trump's unpredictable trade threats, including a postponed 50% tariff on EU goods. Meanwhile, rising expectations of the Bank of Japan tightening gained momentum after core inflation in Japan unexpectedly climbed to 3.5%, its highest level in two years.

The key resistance is at \$148.60 meanwhile the major support is located at \$139.70.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
151.20	149.80	148.60	139.70	137.70	135.00

BRENT OIL



Brent crude edged down to around \$64.5 on Tuesday with expectations that OPEC+ could increase July output by 411,000 barrels per day. However, losses were contained after President Trump postponed EU tariff discussions to July 9, easing immediate concerns over demand.

Meanwhile, Iran's refusal to suspend uranium enrichment raised the risk of stalled nuclear talks and ongoing oil sanctions, providing some underlying support for prices.

Key resistance is at \$67.70 while the major support is located at \$63.15 per barrel.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$73.10	\$70.00	\$67.70	\$63.15	\$61.00	\$58.30

NASDAQ



US stock futures climbed after President Trump delayed a proposed 50% tariff on EU goods to July 9, easing trade tensions that had rattled markets. Last week's sharp declines, including a 7.57% drop in Apple shares, were driven by escalating fiscal concerns and tariff threats.

Investors now turn their attention to upcoming US data on durable goods, housing, and consumer confidence, as well as earnings reports from Okta, Nvidia, Macy's, and Costco.

The first resistance is at \$21,570, while the initial support stands at \$20,675

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
\$23,000	\$22,200	\$21,570	\$20,675	\$20,365	\$19,250

USDCNH



The offshore yuan dipped to around 7.18 per dollar on Tuesday but stayed near a multi-month high, as markets tracked trade talks.

China and the EU are boosting cooperation ahead of a WTO meeting, while Trump's tariff delay to July 9 eased tensions. The PBOC set a slightly weaker yuan fix, adding pressure, though strong April industrial profits helped limit losses. Focus now shifts to the upcoming PMI data.

Key resistance is at \$7.2200 as the major support is at \$7.1490.

Resistance 3	Resistance 2	Resistance 1	Support 1	Support 2	Support 3
7.2800	7.2650	7.2200	7.1490	7.0865	7.0700

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