



Market Map MMM Report

Tuesday August 25 2026

TODAY'S THEME

Bitcoin tops \$80,000 for the first time since mid-May.

Oil steadies after Bessent's Iran sanctions turn out to be a "warning shot" rather than fresh concrete penalties — markets show little reaction.

Gold and silver pull back from Monday's highs .

KEY NUMBERS

Instrument	Price/Level	Change	Reference Note
DJ30	53,423.6	-0.06%	Prev close 53,455.0 (+0.36% Mon)
S&P 500	7,661.98	+0.06%	Prev close 7,657.32 (-0.17% Mon)
NAS100	29,119.38	+0.25%	Prev close 29,046.33 (-0.84% Mon)
DXY	98.99	+0.09%	Prev close 98.90 (+0.16% Mon)
EURUSD	1.1656	-0.06%	Prev close 1.1659 (-0.03% Mon)
GBPUSD	1.3624	-0.04%	Prev close 1.3629 (0.00% Mon)
USDJPY	159.34	+0.17%	Prev close 159.08 (+0.07% Mon)
XAUUSD (Gold)	4,634.84	-0.37%	Prev close 4,652.22 (+1.05% Mon)
XAGUSD (Silver)	67.94	-1.43%	Prev close 68.92 (-0.04% Mon)

Instrument	Price/Level	Change	Reference Note
Brent Oil — CFD Cash	93.43	+0.35%	Prev close 93.10 (-2.20% Mon)
WTI Oil — CFD Cash	86.06	+0.39%	Prev close 85.73 (-2.03% Mon)
BTCUSD	80,341.05	+1.88%	Prev close 78,980.95 (+0.16% Mon)

MACRO / MICRO & GEOPOLITICAL HEADLINES

Bessent unveils Iran sanctions but delays the toughest blow

› Treasury Secretary Bessent announced sanctions targeting entities engaged in Iranian oil, shipping, crypto, gold and aviation trade, and warned countries to cut economic ties with Tehran or face secondary sanctions — but stopped short of naming specific countries or imposing major new penalties. Iran's economy minister called the move a bluff; the Iranian Rial fell to a record low against the dollar regardless.

Source: CNBC / NBC News

Bitcoin tops \$80,000 on ETF inflows and falling leverage

› Bitcoin touched \$81,250 in Asian trading, extending a 23% weekly gain — as spot ETF inflows, the Treasury's bond-buyback program and a broad-based short squeeze converged.

› Crypto sentiment improves as Bitcoin and Ethereum ETF inflows return, Ethereum treasury demand grows, US regulators propose clearer rules and Solana completes a speed upgrade.

Source: investinglive/ Kalshi

This week's calendar: PCE, GDP and Jackson Hole

› US Core PCE and preliminary Q2 GDP are due Wednesday, while Fed Chair Kevin Warsh speaks at the Jackson Hole symposium on Friday — both key inputs for the September rate-path debate.

Earnings to watch this week

› Nvidia, Marvell Technology and Best Buy all report this week, with Nvidia's results likely to set the tone for the broader AI/chip trade after last week's yield-driven semiconductor selloff.

KEY EVENTS TODAY

No major economic indicators scheduled today. Markets continue to digest Monday's Iran sanctions announcement ahead of Wednesday's PCE/GDP data.

MARKET PULSE — WHAT'S DRIVING MARKETS

🛢️ **Oil:** Brent (93.43) and WTI (86.06) rebound modestly, clawing back part of Monday's sharp slide - the sanctions news lands lighter than the "economic D-Day" framing had suggested.

🏆 **Gold & Silver:** Gold (4,634.84) and silver (67.94) pull back from overnight highs, and Bitcoin's push through \$80,000.

Gold has climbed to its highest level since mid-May, touching \$4,696 an ounce in overnight Asian session, as the Treasury's bond market intervention revives fiscal sustainability concerns and boosts demand for bullion as an alternative store of value.

📈 **Equities:** A mixed, quiet session — the S&P and Nasdaq both edge a bit higher while the Dow is roughly flat, as markets digest Monday's Iran news with no major data due today.

💱 **FX:** The dollar firms slightly (DXY +0.09%) while GBP and EUR both ease modestly in a quiet session ahead of Wednesday's PCE and GDP releases.

KEY TAKEAWAY

- › Bessent's sanctions landing as a "warning shot" rather than a decisive blow keeps the Iran standoff largely where it was — expect oil to stay reactive to any concrete follow-through rather than the rhetoric itself.
- › Bitcoin's push through \$80,000 is backed by falling leverage and genuine ETF inflows rather than pure short-covering.
- › The focus right now is on Treasury buybacks, US-Iran deadlock and the upcoming Jackson Hole Symposium, and with no major data today, Wednesday's PCE/GDP release becomes the week's first true catalyst — treat today's calm as a pause.

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