



MultiFi Market Map_(MMM)

Tuesday, September 29, 2026

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Today's Theme

- Gold and silver stabilize (XAU +0.54%, XAG +0.05%) after Monday's steep rout (-4.01%/-5.73%), as October Fed hike odds jump to ~70% on Iran-driven oil strength and higher yields.
- RBA decision due 7:30 AM Beirut — markets price a hike to 4.60% from 4.35%, with the Rate Statement and press conference to follow within the hour
- Iran's FM Araghchi says Tehran is ready for an "extreme conflict scenario" even as Trump signals to Axios that talks could resume this week — Gulf risk stays fluid.
- Wall Street extends Monday's pullback (DJ30 -0.16%, S&P -0.17%, NAS100 -0.30%) as firmer oil and rising hike bets keep risk appetite capped.
- Busy calendar: RBA and ECB's Lagarde today, ahead of Wednesday's Core PCE/GDP and Friday's US jobs report, with Micron and Nike earnings due midweek.

Key Numbers

Instrument	Price/Level	Changes	Reference Notes
DJ30	51,409.5	-0.16%	Prev close 51,490.4 (-0.65% Mon)
S&P 500	7,671.95	-0.17%	Prev close 7,684.98 (-0.75% Mon)
NAS100	30,191.70	-0.30%	Prev close 30,281.45 (-1.16% Mon)
DXY	100.98	+0.07%	Prev close 100.91 (+0.17% Mon)
EURUSD	1.1362	-0.07%	Prev close 1.1370 (-0.19% Mon)
GBPUSD	1.3242	-0.08%	Prev close 1.3253 (+0.06% Mon)
USDJPY	157.33	-0.03%	Prev close 157.38 (+0.04% Mon)
XAUUSD (Gold)	4,136.47	+0.54%	Prev close 4,114.10 (-4.01% Mon)
XAGUSD (Silver)	60.65	+0.05%	Prev close 60.62 (-5.73% Mon)
Brent Oil — CFD Cash	103.48	+0.79%	Prev close 102.68 (+0.77% Mon)
WTI Oil — CFD Cash	96.87	+0.48%	Prev close 96.40 (+0.50% Mon)
BTCUSD	83,125.95	-0.37%	Prev close 83,434.55 (-1.29% Mon)

The above levels are indicative as of the time of publication.

Macro/Micro & Geopolitical Headlines

Gold and silver find a floor after Monday's sharpest drop in months

Bullion tumbled as oil's rebound on the collapsed Hormuz roadmap reinforced Fed hike bets, with October odds jumping to roughly 70% from 64% the day before and the 10-year Treasury yield pushing above 5.2%.

Analysts framed the move as a paper-market repricing rather than a shift in physical demand, and both metals are edging higher again this morning.

Source: USAGOLD

RBA decision headlines a loaded Tuesday calendar

Australia's central bank delivers its Cash Rate decision at 7:30 AM Beirut time, with markets pricing a hike to 4.60% from 4.35%, followed immediately by the Rate Statement and an 8:30 AM press conference.

ECB President Lagarde speaks separately at 2:00 PM, adding a second policy focal point to the session.

Source: Forex Factory

Iran's Araghchi warns of "extreme conflict scenario" as Trump points to resumed talks

Iran's foreign minister said Tehran is prepared for a worst-case escalation after Trump's rejection of its phased Hormuz-reopening plan, even as Trump told Axios he expects US-Iran talks to pick back up this week. Tehran says it remains open to reopening the strait once it receives a "definitive" response through mediators by Tuesday — keeping the diplomatic and military tracks running in parallel.

Source: Al Jazeera

Wall Street extends its pullback as rate and oil pressures persist

Asia-Pacific stocks mostly fell on Tuesday as the US 10-year yield closed at its highest since the US attack on Iran, and oil rose amid conflicting Iran headlines. The Nikkei fell 1.2%, the KOSPI 0.6%.

The Dow, S&P 500 and Nasdaq 100 are all lower again after Monday's retreat from Friday's rally, as firmer crude and climbing hike odds keep a lid on risk appetite heading into a week stacked with central-bank decisions and US data.

Source: investinglive, Reuters

KEY EVENTS

- **7:30 AM Beirut / 4:30 GMT** — AUD Cash Rate: forecast 4.60%, previous 4.35%, followed by the RBA Rate Statement
- **8:30 AM Beirut / 5:30 GMT** — RBA Press Conference
- **2:00 PM Beirut / 11:00 GMT** — ECB President Lagarde speaks
- **3:30 PM Beirut / 12:30 GMT** — CAD GDP m/m: forecast 0.0%, previous 0.3%
- **5:00 PM Beirut / 2:00 PM GMT** — US CB Consumer Confidence: forecast 89.2, previous 89.4
- **5:00 PM Beirut / 2:00 PM GMT** — US JOLTS Job Openings: forecast 7.23M, previous 7.27M

Market Pulse — What's Driving Markets

Oil: Brent (103.48) and WTI (96.87) hold most of Monday's gains as the collapsed Hormuz roadmap and Iran's hardened rhetoric keep a geopolitical premium in crude.

Gold & Silver: Gold (4,136.47) and silver (60.65) edge higher, stabilizing after Monday's sharp rout even as ~70% October hike odds cap the bounce. State Street says gold could fall back to \$4,000 within a week as Fed hike bets, higher yields and a firmer US dollar bite, but expects that floor to hold and \$5,000 to be reachable within six months, citing record Chinese buying and ETF inflows.

Equities: DJ30, S&P 500, and NAS100 extend Monday's pullback as surging Treasury yields and higher oil prices rattle sentiment. .

FX: Dollar index (100.98) firms modestly; AUD in focus into the RBA decision, while yen holds steady near 157.33.

Key Takeaway

- The RBA's decision this morning (a hike to 4.60% is priced in) is the day's first real test — a surprise on either side could move AUD and ripple through broader risk sentiment.
- Gold and silver's bounce doesn't yet mark a new floor — with October hike odds near 70%, a confirmed Fed move would likely reopen the downside in bullion.
- Iran's hardened rhetoric alongside Trump's talk of resumed negotiations keeps oil on a knife's edge — any real sign of renewed talks, or another regional flare-up, could swing Brent and WTI sharply into midweek.

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