

| | | | | | | | |
|------------|----------------------|-------------------|--------------------|---------------|-----------------------|-------------|---------------------|
| BTC | \$75,171.45 +0.5% | S&P500 | 7,041.09 +0.3% | US 10Y | 4.3120% +0.0330PPT | WTI | \$93.32 +2.2% |
| ETH | \$2,348.72 -0.5% | Nasdaq | 24,102.70 +0.4% | DXY | 98.21 +0.2% | Gold | \$4,812.91 -0.2% |

- \$BTC remains rangebound while most altcoins are higher. As of now, \$BTC is trading at \$75,171 and \$ETH is trading at \$2,348. Bitcoin dominance stands at 59.42%.
- Drift announced a collaboration with Tether and partners totaling nearly \$150 million to support its relaunch with USDT at the core and enable user recovery. The package includes a \$100M revenue-linked credit facility, ecosystem grants, and loans to market makers.
- A few other headlines include: Tempo unveils a pragmatic privacy solution called Zones, enabling permissioned parallel blockchains; and Grinex, one of Russia's largest cryptocurrency exchanges, was attacked, resulting in a loss of approximately 13 million USDT.
- During the last 24 hours, the top three gainers were \$SIREN, \$ORDI, and \$RAVE, while the top three losers were \$DEXE, \$HASH, and \$DASH.

Tokenized Stocks Cross \$1B: Escape Velocity Achieved?

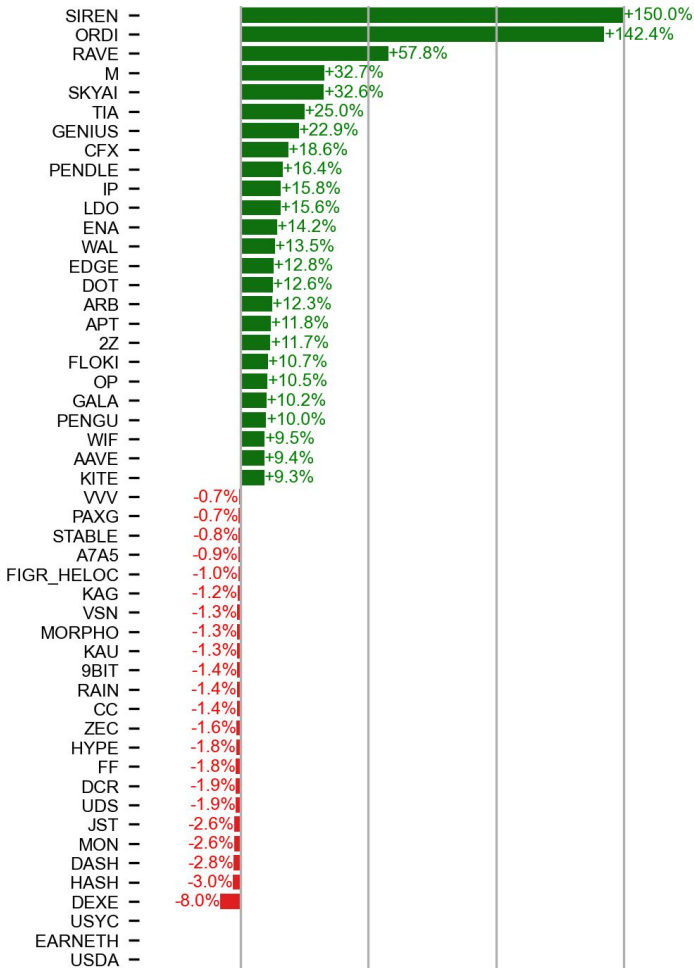
After tokenization of fiat, US Treasuries, and commodities, tokenized stocks are emerging as a major RWA growth driver. The total value of tokenized stocks surpassed the \$1B mark this week, but it's likely just scratching the surface. First, growth so far has occurred even without support from regulated trading venues, pointing to significant upside once institutions participate. Both the NYSE and Nasdaq have announced plans for tokenized equity trading platforms, with launches expected later this year. Second, the addressable market for tokenized stocks dwarfs that of stablecoins: the US equity market stands at \$69 trillion, compared to \$22 trillion in US M2 money supply. Yet tokenization penetration remains tiny for stocks (0.0014%) vs. stablecoins (1.4%). Stablecoins first surpassed \$1B in market cap in April '19 and then grew 7x / 70x / 180x over the following 1 / 2 / 3 years. Tokenized stocks, too, may be on the verge of a similar take-off.



Source: rwa.xyz

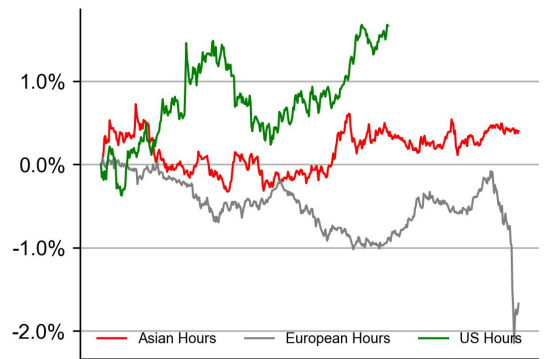
PRICE ACTIONS

24H Price Change (Top/Bottom 25 from Top 200)

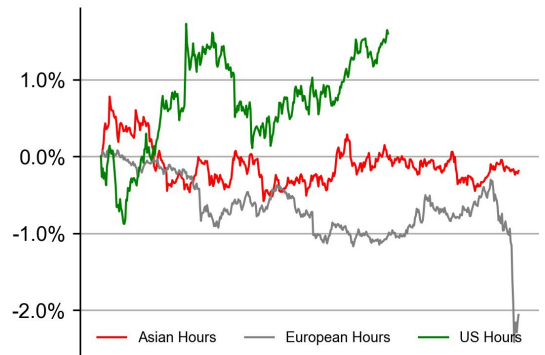


Time Zone Analysis

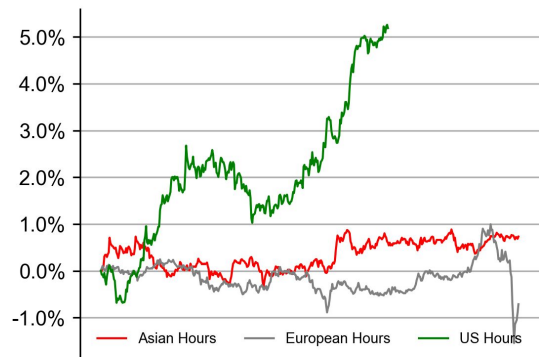
BTC



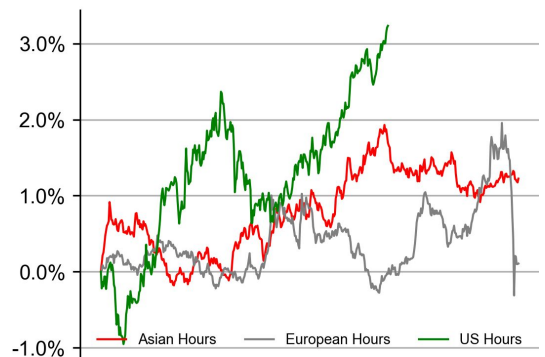
ETH



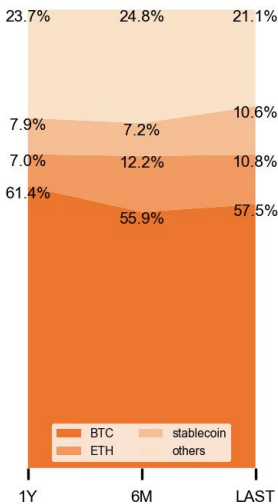
SOL



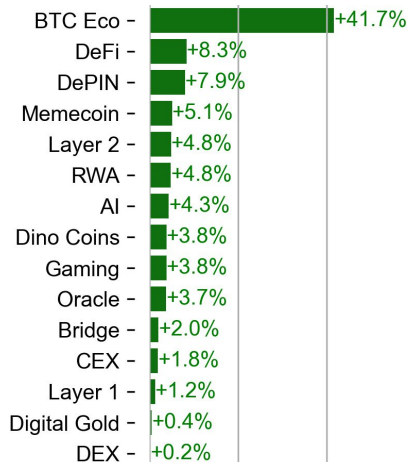
XRP



Dominance Ratio

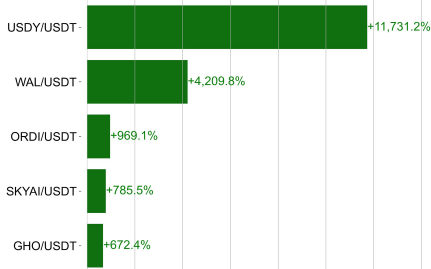


Sector Performance



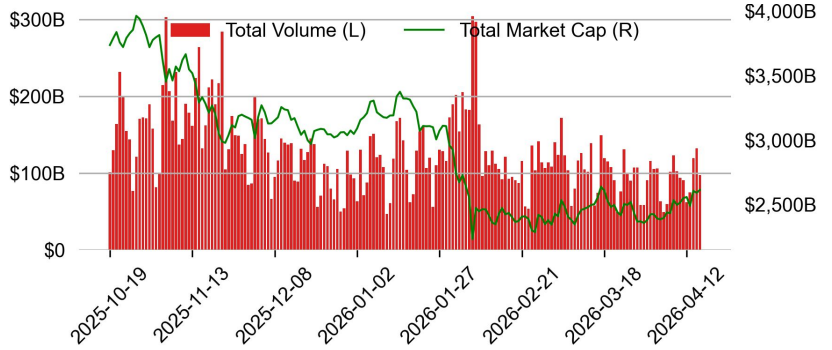
TRADING VOLUME

24H Vol % Chg*

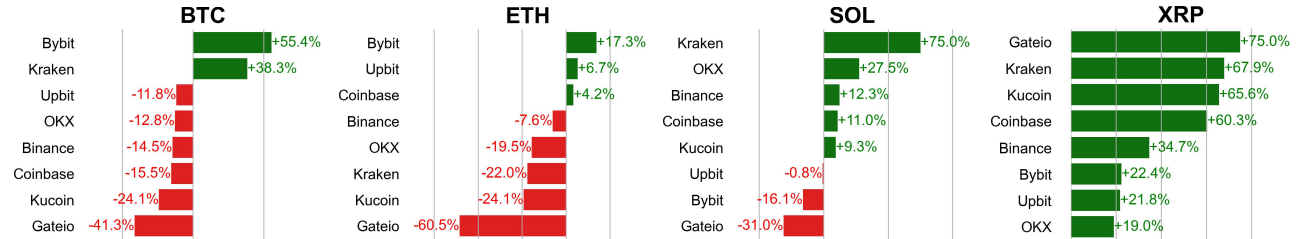


* 5 largest 24H vol. change from the universe of top 50 assets by market cap

Spot Volume



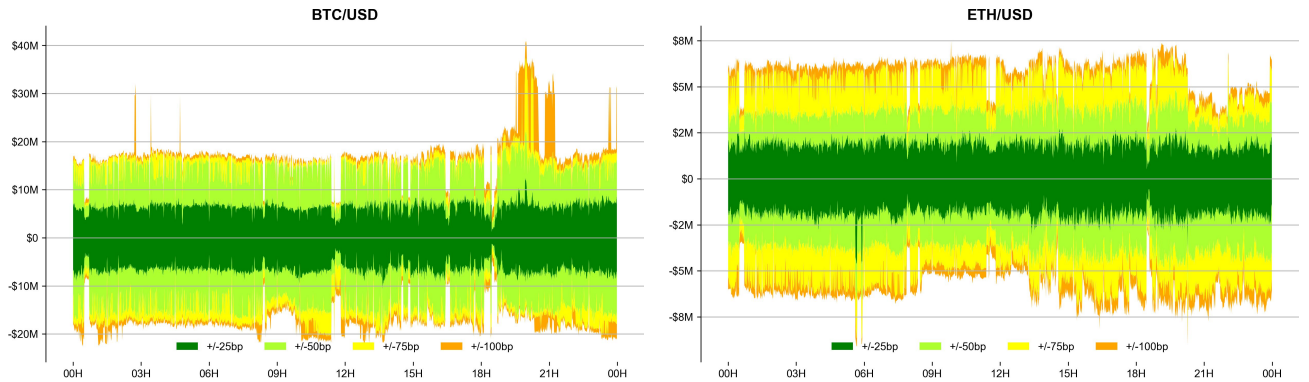
Spot Volume Leaders (% chg vs ave)*



* ranked by the % difference between the 24H volume vs. the 30-day average

ORDER BOOK DEPTH (within 1% best bid/ask)

Coinbase

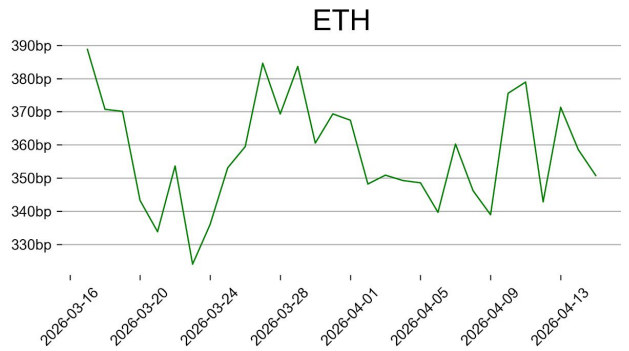
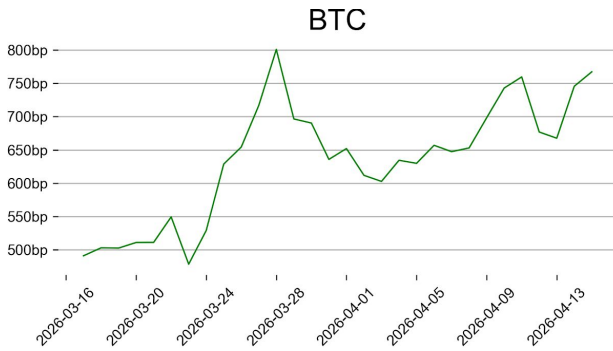


Binance

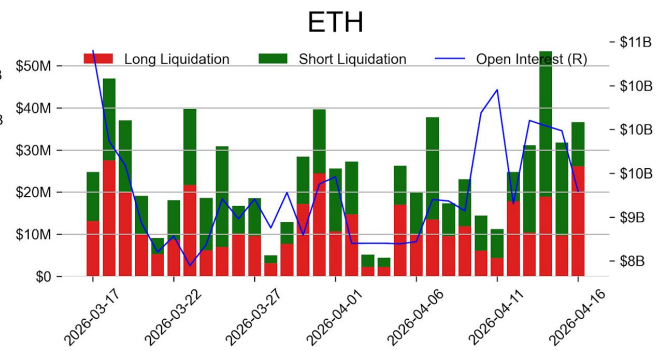
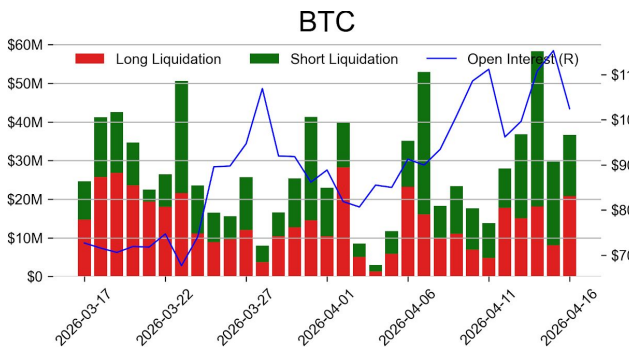


DERIVATIVES

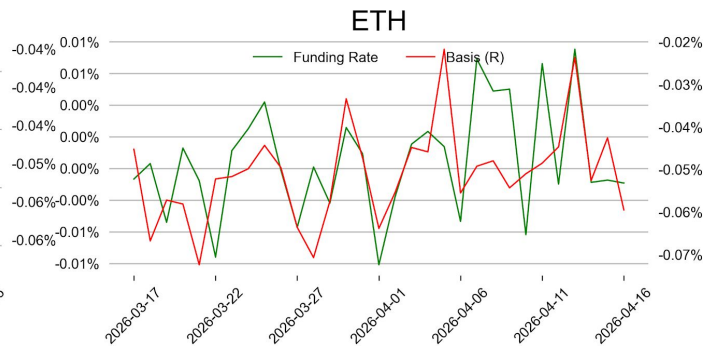
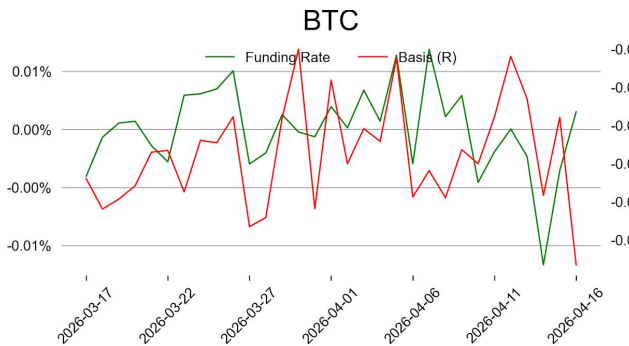
Open Interest / Market Cap



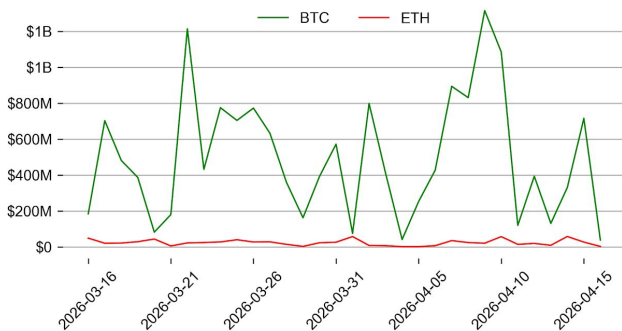
Futures O.I. & Liquidations



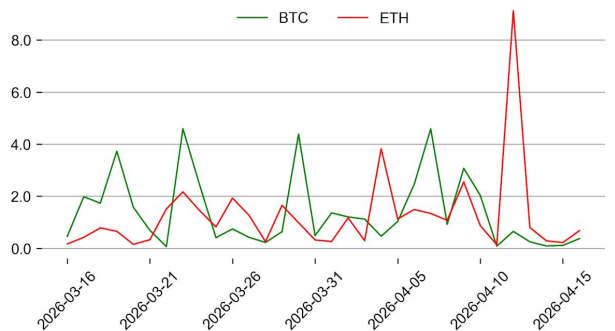
Perps Funding Rate & Rolling Basis



Option Volume



Put Call Ratio



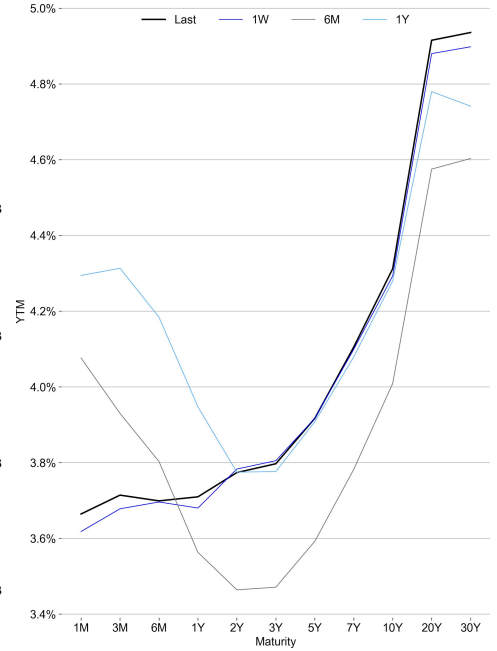
TRADFI

| | Stocks | | | | | FX | | | | Commodity | | Crypto Equity | | | |
|------|---------|----------|-------------|----------|---------|---------|---------|---------|-------|-----------|---------|---------------|--------|-------|--------|
| | S&P500 | Nasdaq | EuroStoxx50 | HSI | CSI300 | USD/EUR | USD/JPY | USD/CNY | DXY | WTI | Gold | COIN | MSTR | MARA | RIOT |
| Last | 7041.09 | 24102.70 | 5938.16 | 26394.26 | 4736.61 | 0.8488 | 159.21 | 6.8214 | 98.21 | 93.32 | 4812.91 | 199.83 | 149.06 | 11.52 | 16.92 |
| 1D | 0.3% | 0.4% | -0.0% | 1.7% | 1.1% | 0.2% | 0.1% | 0.0% | 0.2% | 2.2% | -0.2% | 2.0% | 3.8% | 10.0% | -2.9% |
| 1M | 4.8% | 7.2% | 2.9% | 2.0% | 2.1% | -2.1% | 0.1% | -1.0% | -1.4% | -3.0% | -4.6% | -4.9% | -0.8% | 24.7% | 15.3% |
| 1Y | 33.5% | 47.8% | 19.6% | 25.3% | 25.5% | -3.2% | 12.3% | -6.6% | -1.2% | 49.4% | 43.8% | 16.0% | -52.2% | -6.5% | 166.0% |

BTC Spot ETF Flow

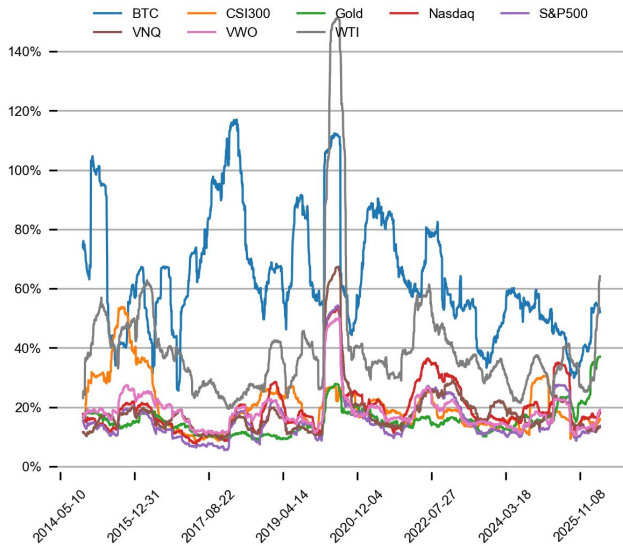


US Treasury Yield Curve

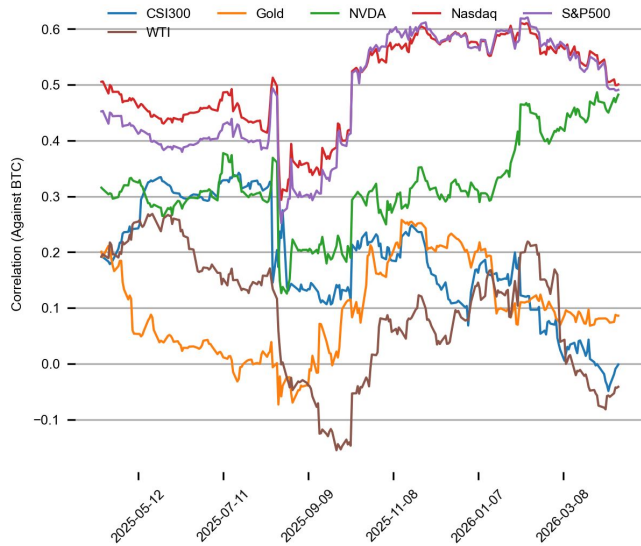


CROSS ASSET METRICS

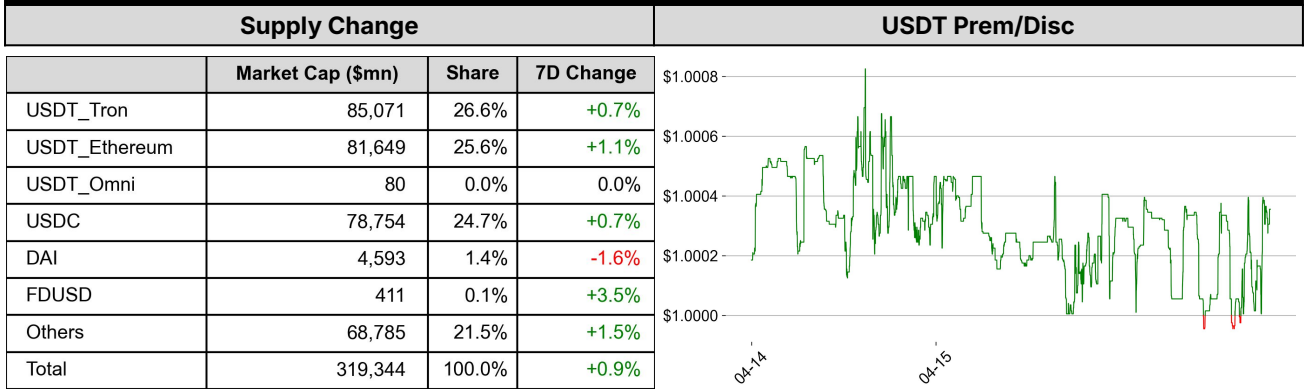
Volatility



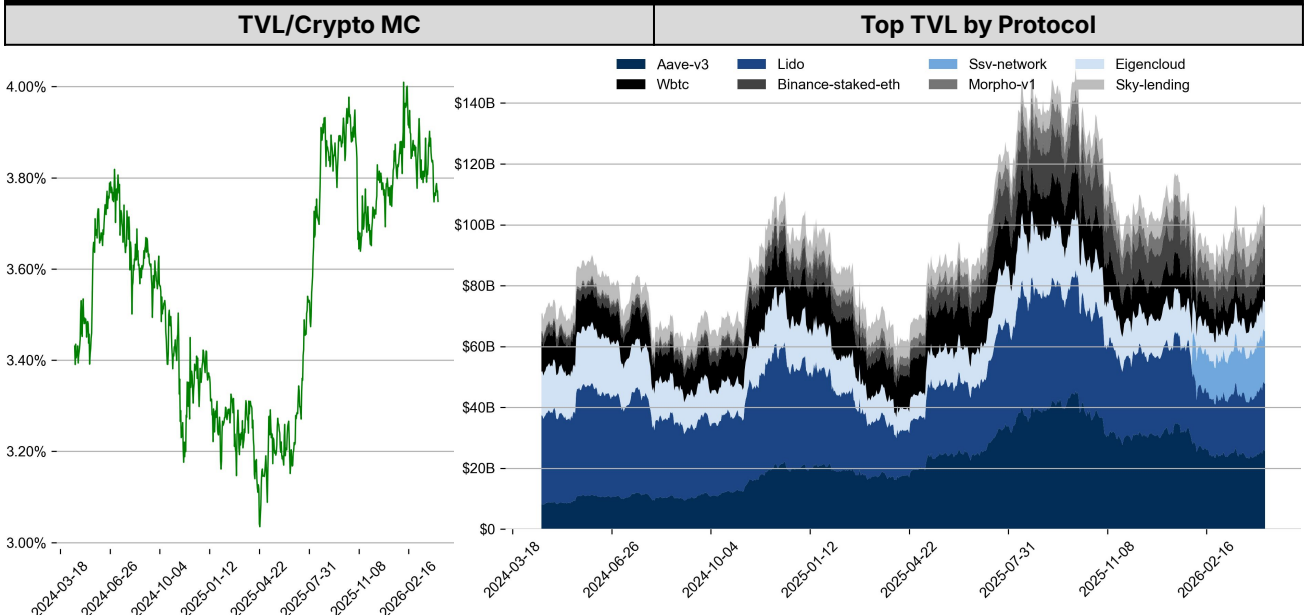
Correlation



STABLECOIN



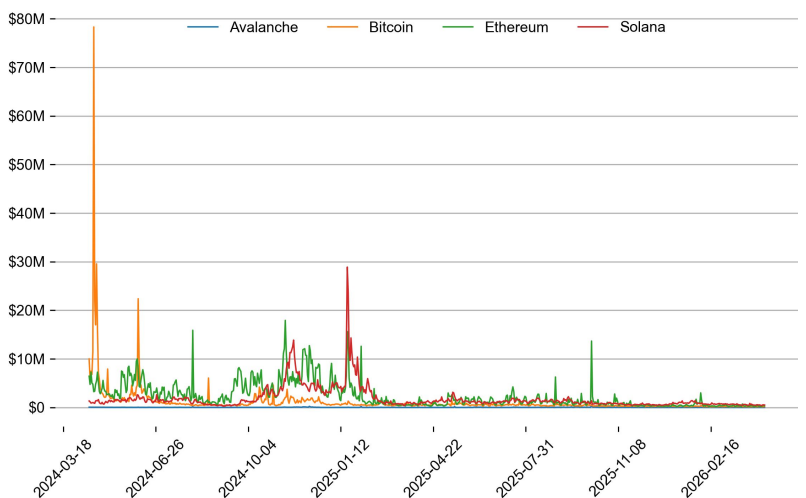
ONCHAIN MOVES



Top TVL Gainers*

| # | Name | 7D Change |
|---|----------------|-----------|
| 1 | Ember Protocol | +66.1% |
| 2 | OKX | +41.0% |
| 3 | Strata Markets | +32.1% |
| 4 | Aster Bridge | +19.9% |
| 5 | Fraxtal | +19.0% |

Daily Network Fees



* 5 largest 7 day TVL change in % terms from the universe of minimum \$100m TVL protocols, according to DefiLlama.

EVENTS CALENDAR

| Date | Title | Coins / Hosts |
|--------------|--------------------------------------|----------------------|
| Apr 3, 2026 | Morgan Stanley Spot BTC ETF | |
| Apr 6, 2026 | ~\$12.3M Unlock | \$HYPE |
| Apr 7, 2026 | Samsung Preliminary Earnings | |
| Apr 8, 2026 | FOMC March Minutes | |
| Apr 9, 2026 | US PCE | |
| Apr 10, 2026 | US CPI | |
| Apr 14, 2026 | US PPI | |
| Apr 15, 2026 | FED Beige Book | |
| Apr 16, 2026 | TSMC Earnings Call | |
| Apr 17, 2026 | Scene of the Hearing for Kevin Warsh | |
| Apr 27, 2026 | BOJ Rate Decision | |
| Apr 28, 2026 | \$12.78M Unlock | \$SIGN |
| Apr 29, 2026 | FOMC | |
| Apr 30, 2026 | FTX Payout Record Date | |

DATA EXPLAINER

| Headers | Source | Note |
|--|------------------------------------|---|
| PRICE ACTIONS TRADING VOLUME ORDER BOOK DEPTH DERIVATIVES | Presto Labs | <p>Time Zone Analysis separates out the asset's price action according to the business hours in Asia, Europe and US region. This is to identify which geography is responsible for price actions of the last 24hrs. The cut-offs are,</p> <ul style="list-style-type: none"> - Asia: UTC 22:00 -1 to UTC 6:00 - Europe: UTC 6:00 to 14:00 - US: UTC 14:00 to 22:00 <p>Sector constituents are, AI(FET, AGIX, OCEAN), BTC Eco(BCH, BSV, ICP, STX, ORDI), CEX(BNB, CRO, OKB, KCS, BGB), Data(LINK, GRT), DePIN(ICP, FIL, AR, HNT, SIA), DEX(UNI, INJ, RUNE, SNX, DYDX, OSMO, CRV, CAKE, GMX), Digital Gold(BTC), Gaming/Metaverse(IMX, BEAM, SAND, GALA, AXS, WEMIX, RON), LO(AVAX, DOT, TIA), L2(MATIC, OP, MNT, ARB, STRK), Lending(MKR, AAVE, COMP), Liquid Staking(LDO, RPL, JTO), Meme(DOGE, SHIB, FLOKI), NFT(APE, BLUR), Payments(XRP, LTC, XLM, XMR, ZEC), RWA(ONDO, CFG), Smart Contract(ETH, BNB, SOL, ADA, TRX, TON, APT, NEAR, HBAR, VET, ALGO, FTM, SUI, FLOW, MINA). The sector return is market-cap weighted average of the constituents' returns.</p> <p>Exchanges: 24H spot price & volume % changes and dominance ratios are from CoinGecko. Time Zone Analysis is based on data from Binance. Spot volume leaders are based on data from Binance Bybit, Coinbase, Kraken, OKX, KuCoin, HTX, Upbit, Gate.io. Futures data are from Binance OKX, Bybit, KuCoin. Options data are from Deribit.</p> |
| TRADFI | Investing.com Farside Investors | <p>BTC Spot ETF Flows are based on data shown on farside.co.uk at UTC 03:00. Due to varying data reporting schedules among ETF sponsors, the figures may not encompass data from all 10 ETFs.</p> |
| STABLECOIN ONCHAIN MOVES | DefiLlama | <p>Stablecoin Supply is a proxy for fiat on/off ramp from TradFi into crypto.</p> <p>USDT Prem/Disc reflects the USDT supply/demand imbalance, approximating the market's risk aversion towards USDT specifically, and/or the crypto market more broadly. The data is from Coinbase.</p> <p>TVL/ Crypto MC Ratio = Total Value Locked / Crypto Market Cap. The ratio neutralizes the TVL changes caused by asset price fluctuations.</p> |
| EVENTS CALENDAR | CoinMarketCap Investing.com | <p>Events Calendar provides a summary of major events happening throughout the month.</p> |

* The Daily Market Brief is published every business day, following the Singapore calendar, excluding public holidays

About Presto

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