



Daily Market Brief
Apr 29, 2026 (UTC -02:00)

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BTC	\$76,346.23	S&P500	7,138.77	US 10Y	4.3440%	WTI	\$99.43
	-1.3%		-0.5%		+0.0080PPT		+3.2%
ETH	\$2,289.67	Nasdaq	24,663.80	DXY	98.59	Gold	\$4,609.79
	-0.6%		-0.9%		+0.1%		-1.8%

- \$BTC continues to slide. As of now \$BTC is trading at \$76,346 and \$ETH is trading at \$2,289. Bitcoin dominance stands at 60.40%.
- Robinhood’s Q1 crypto revenue fell 47% yoy to \$134M, while crypto trading volume dropped 48% to \$24B, reflecting weaker retail trading activity and a broader slowdown in digital asset markets after the late-2025 crash. Despite the sharp decline, total revenue still rose 15% to \$1.07B as growth in subscriptions, interest income, and prediction markets helped offset weaker crypto performance.
- A few other headlines include: Pump burns \$370M worth of tokens and initiates a buyback and burn scheme using 50% of revenue, Strategy opens a vote to change \$STRC dividend payments to semi-monthly instead of monthly, and LayerZero commits 10,000 ETH to the DeFi United effort.
- During the last 24 hours, the top three gainers were \$SKYAI, \$H, and \$BSB, while the top three losers were \$DEXE, \$ZBCN, and \$SFP.

Paul Tudor Jones Warns on Stocks, Doubles Down on Bitcoin

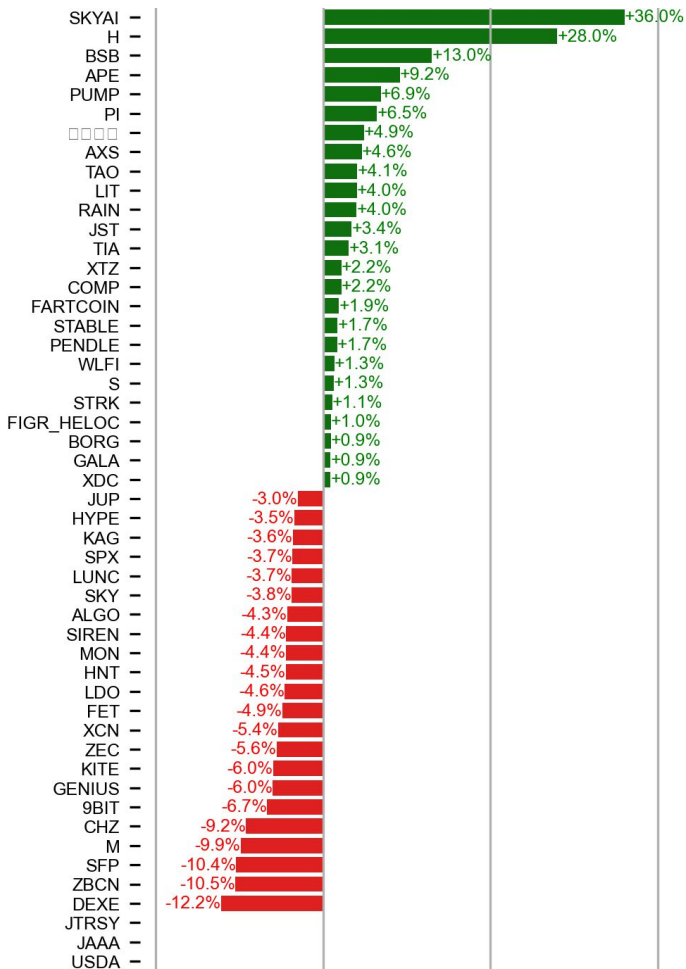
Legendary hedge fund investor Paul Tudor Jones will always be remembered in the crypto community for his May 2020 investor letter, “The Great Monetary Inflation.” Well before Larry Fink and Stan Druckenmiller, he was the first high-profile traditional investor to recognize Bitcoin as a viable inflation hedge, at a time when merely mentioning Bitcoin on Wall Street often triggered chuckles. Six years later, he remains unbowed. In an overnight podcast appearance, Jones said, “Bitcoin is unequivocally the best inflation hedge there is, better than gold.” At the same time, he cautioned against current equity valuations, pointing to the peak stock market capitalization-to-GDP ratio. He sees a potential supply-demand imbalance ahead from reduced share buybacks and a wave of major upcoming IPOs (SpaceX, OpenAI, Anthropic) that could push equities into a consolidation phase. For those puzzled by Bitcoin’s 38% lag versus the S&P 500 for the last 7 months, this scenario may finally close the gap.



Source: Guru Focus

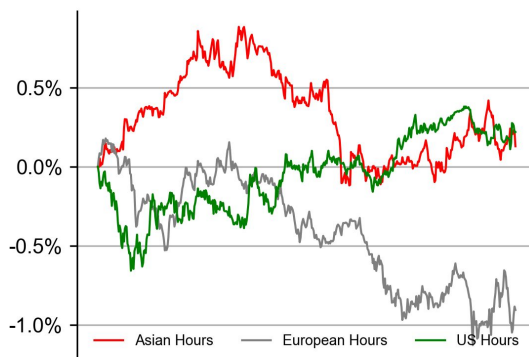
PRICE ACTIONS

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

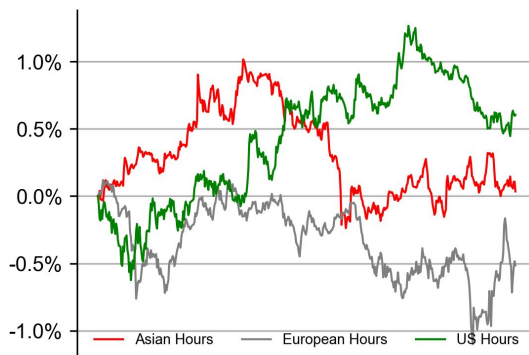


Time Zone Analysis

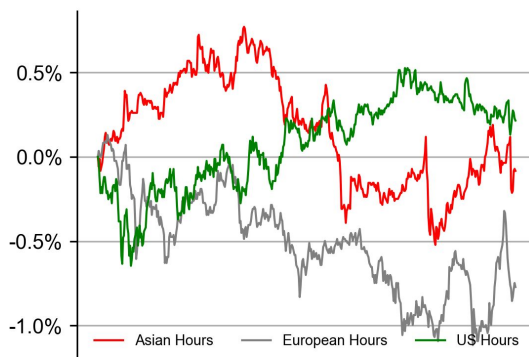
BTC



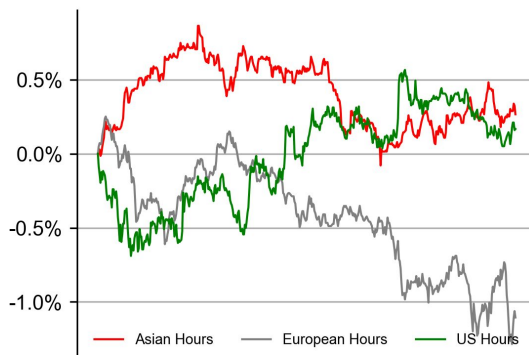
ETH



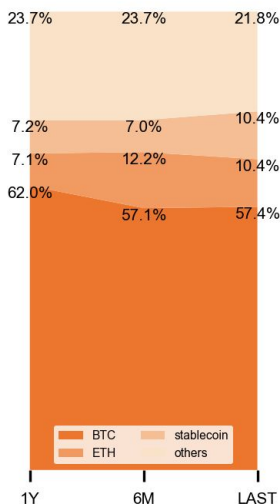
SOL



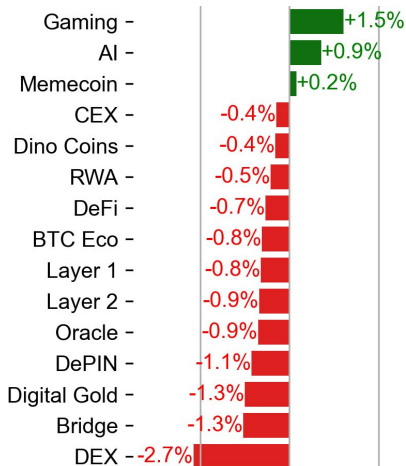
XRP



Dominance Ratio

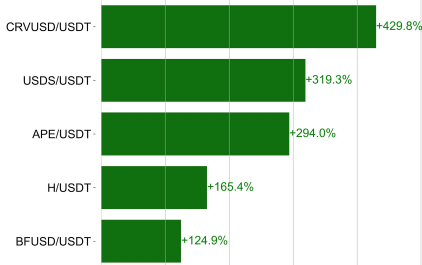


Sector Performance

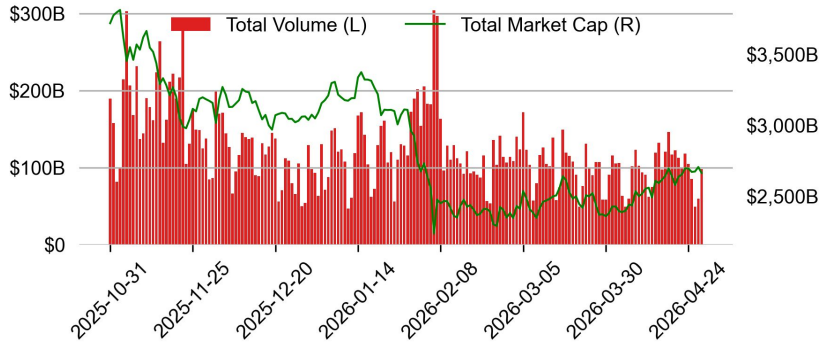


TRADING VOLUME

24H Vol % Chg*

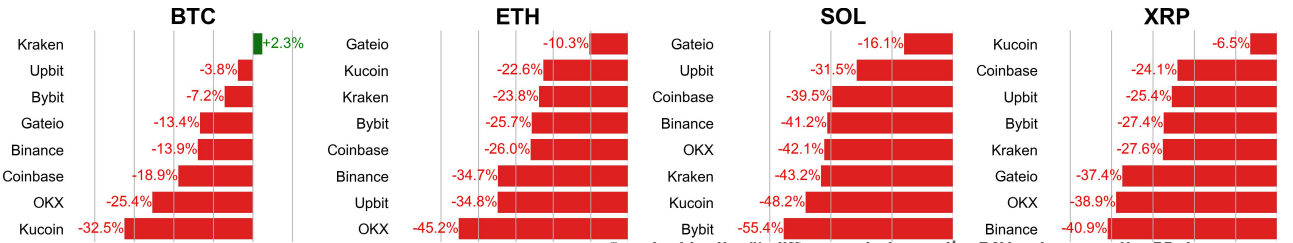


Spot Volume



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

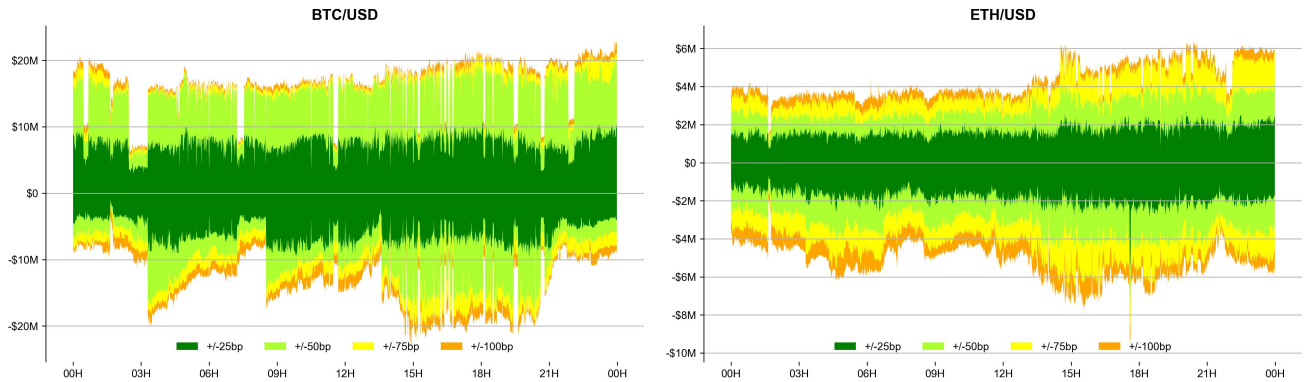
Spot Volume Leaders (% chg vs ave)*



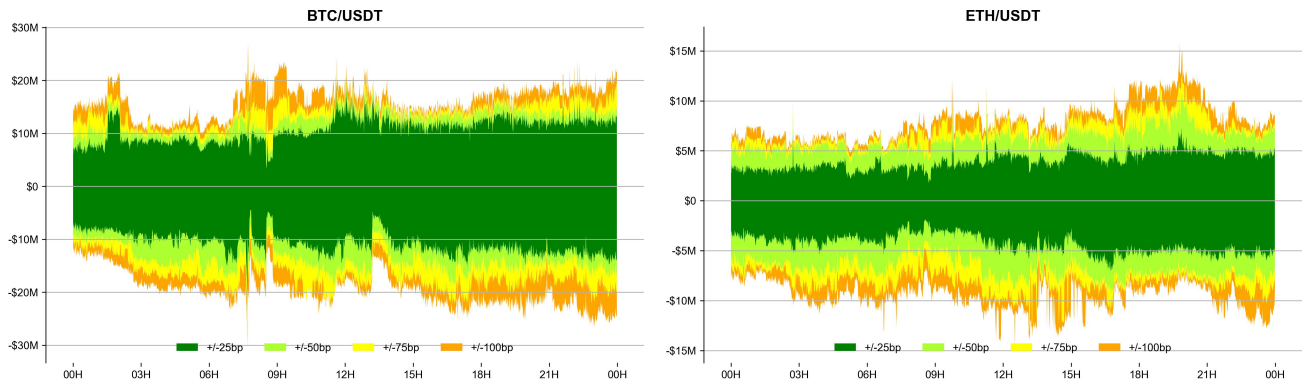
* ranked by the % difference between the 24H volume vs. the 30-day average

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

Coinbase

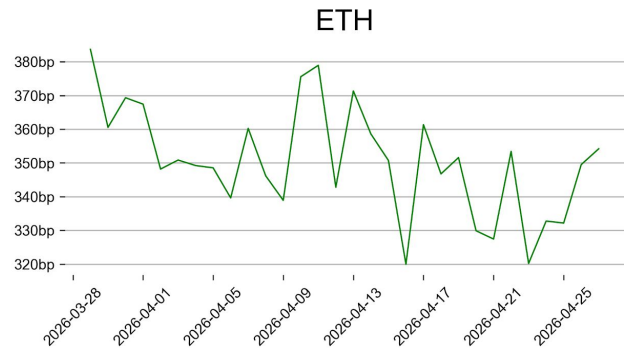
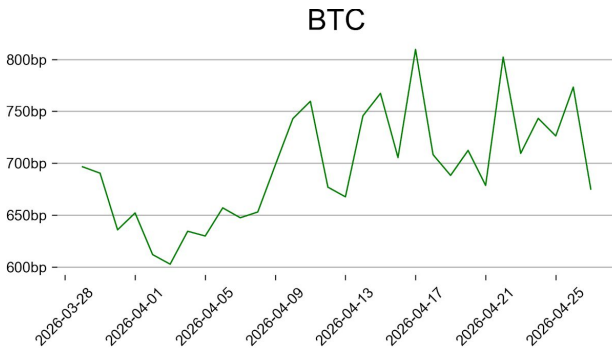


Binance

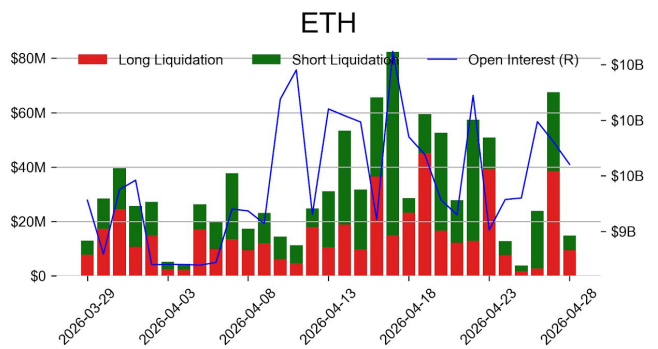
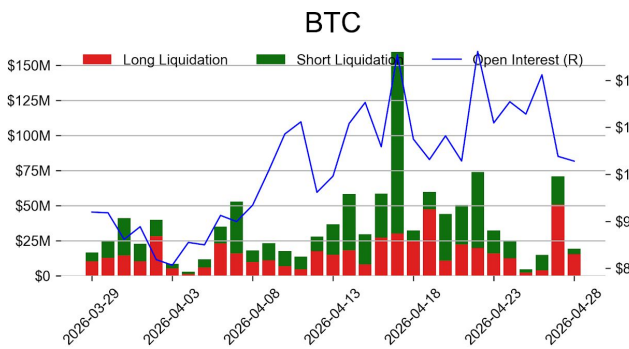


DERIVATIVES

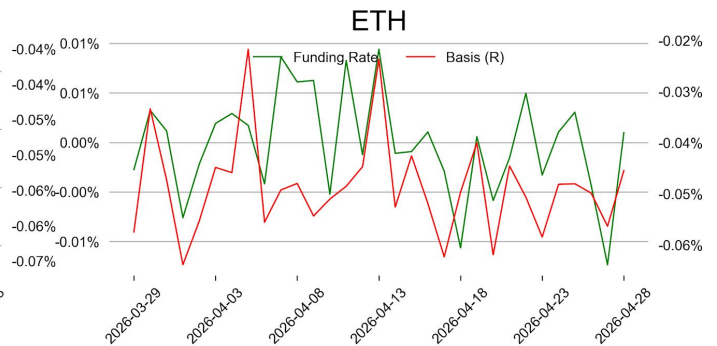
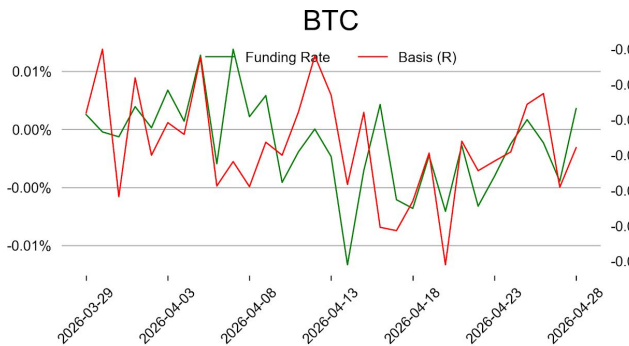
Open Interest / Market Cap



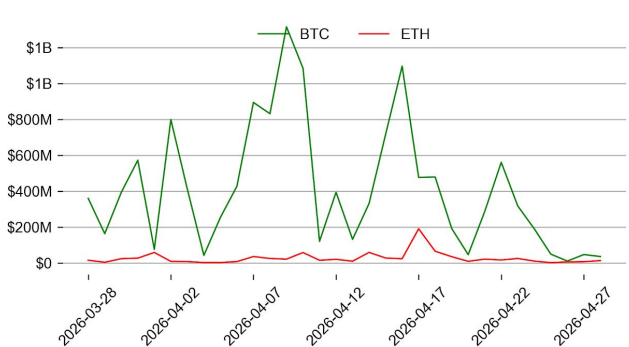
Futures O.I. & Liquidations



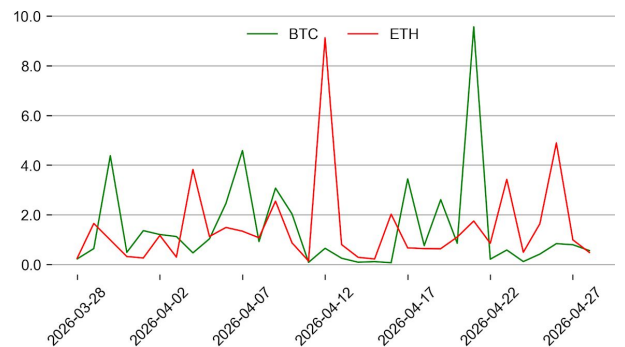
Perps Funding Rate & Rolling Basis



Option Volume



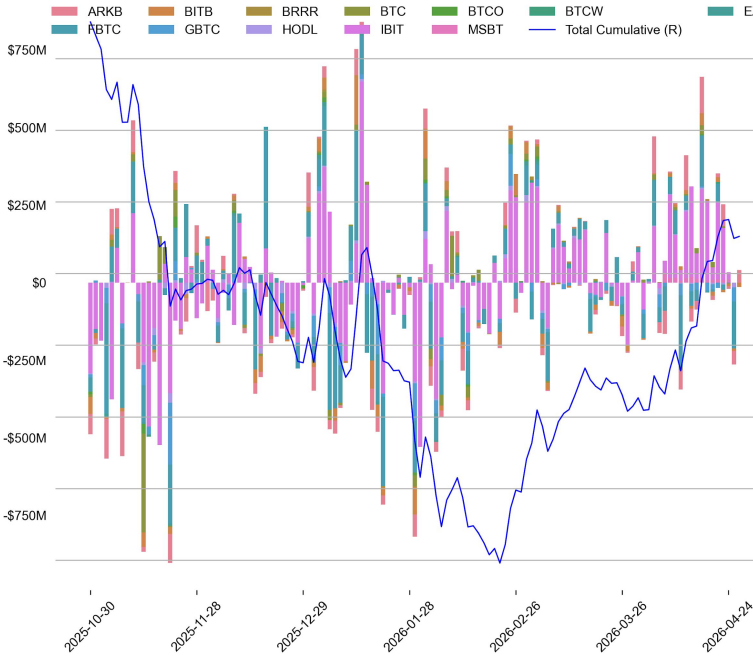
Put Call Ratio



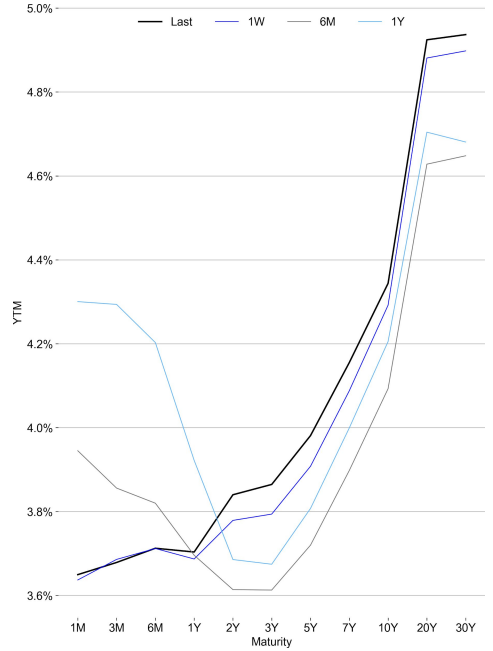
TRADFI

	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	7138.77	24663.80	5834.86	25679.78	4758.21	0.8534	159.56	6.8375	98.59	99.43	4609.79	194.10	165.70	11.02	16.57
1D	-0.5%	-0.9%	-0.4%	-0.9%	-0.3%	0.0%	0.1%	0.2%	0.1%	3.2%	-1.8%	-1.3%	-2.1%	-1.4%	-9.4%
1M	12.1%	17.7%	6.0%	2.9%	5.7%	-1.8%	-0.5%	-1.1%	-1.6%	-0.2%	2.2%	20.5%	31.5%	37.4%	29.5%
1Y	29.1%	42.0%	12.8%	16.9%	25.8%	-2.5%	12.4%	-6.3%	-0.4%	60.2%	38.3%	-5.4%	-55.1%	-21.3%	117.2%

BTC Spot ETF Flow

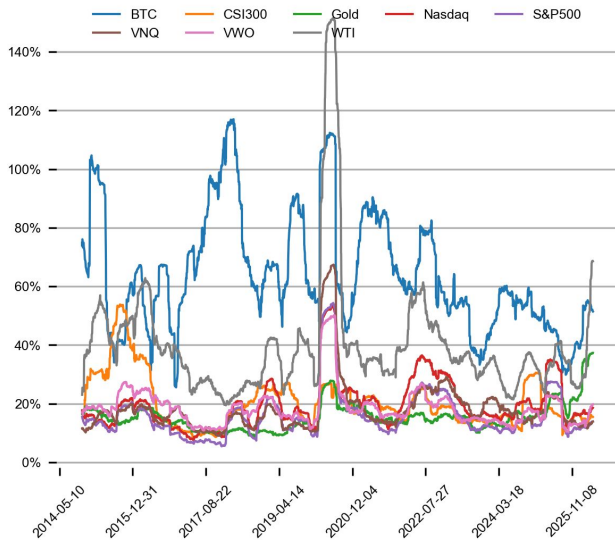


US Treasury Yield Curve

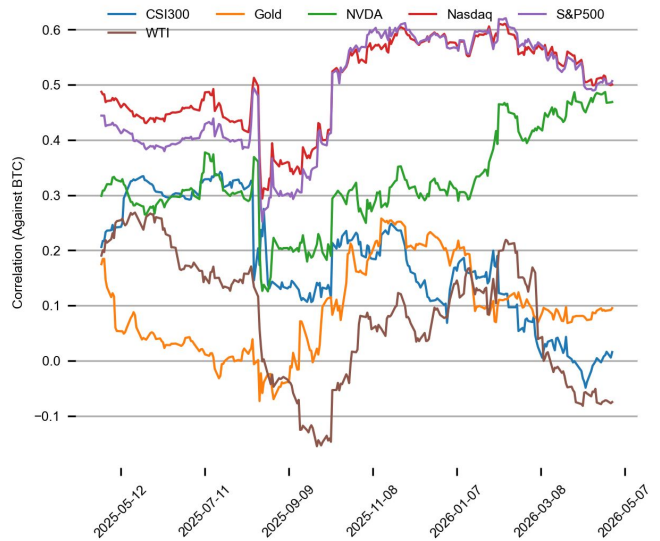


CROSS ASSET METRICS

Volatility



Correlation



STABLECOIN

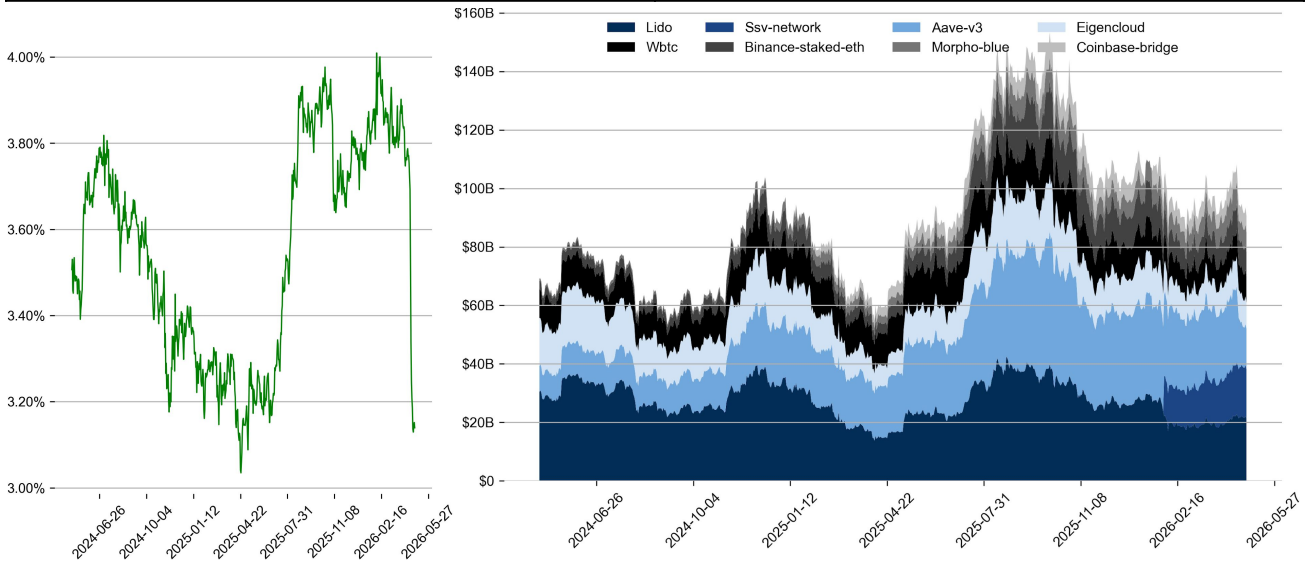
Supply Change

USDT Prem/Disc

ONCHAIN MOVES

TVL/Crypto MC

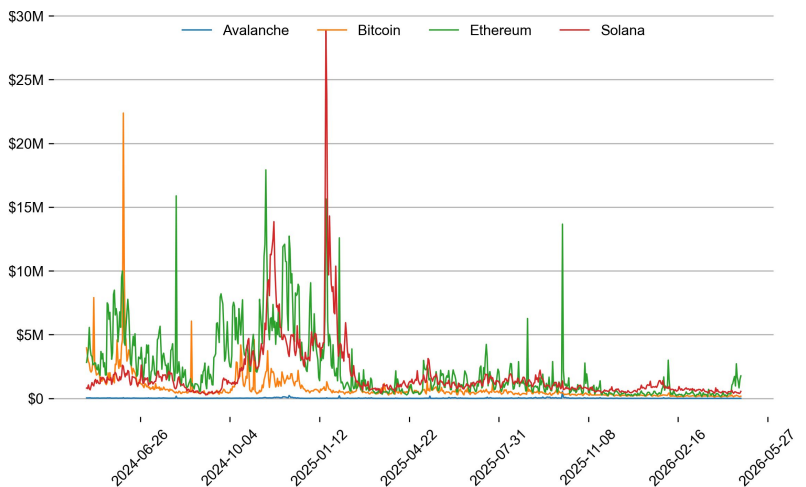
Top TVL by Protocol



Top TVL Gainers*

Daily Network Fees

#	Name	7D Change
1	KPK	+250.2%
2	crvUSD	+102.7%
3	Gauntlet	+50.3%
4	Sentora	+34.2%
5	Euler V2	+30.6%



* 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

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