

**Daily Market Brief**  
**Mar 27, 2026 (UTC -02:00)**

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**Min Jung** | Research Associate

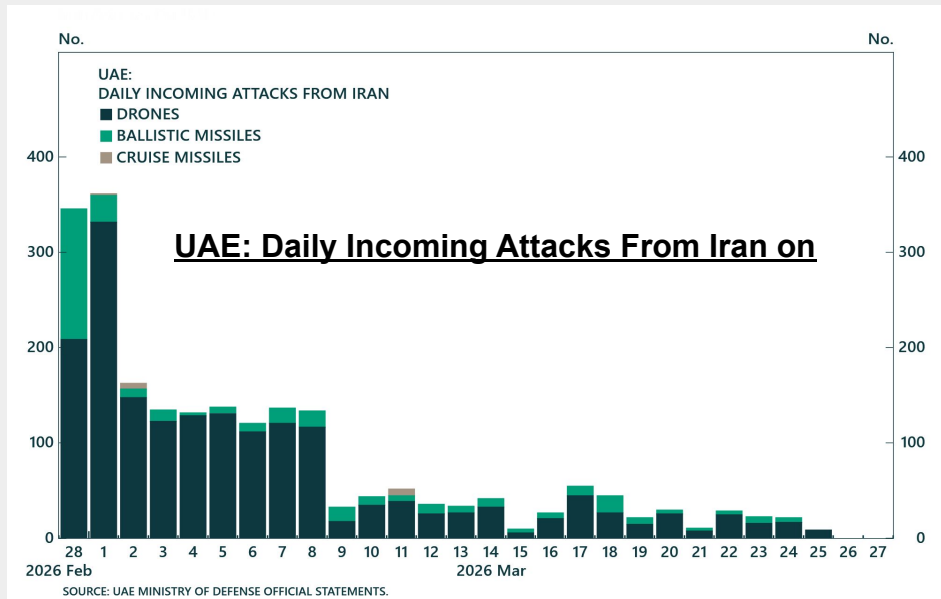
<b>BTC</b>	<b>\$68,812.62</b>	<b>S&amp;P500</b>	<b>6,477.10</b>	<b>US 10Y</b>	<b>4.4090%</b>	<b>WTI</b>	<b>\$93.25</b>
	-3.5%		-1.7%		+0.0810PPT		+3.2%
<b>ETH</b>	<b>\$2,060.43</b>	<b>Nasdaq</b>	<b>21,408.08</b>	<b>DXY</b>	<b>99.89</b>	<b>Gold</b>	<b>\$4,431.62</b>
	-5.0%		-2.4%		+0.3%		-3.4%

- Risk assets sold off. As of now \$BTC is trading at \$68,812 and \$ETH is trading at \$2,060. Bitcoin dominance stands at 58.85%.
- Fannie Mae will begin accepting crypto-backed mortgages, allowing borrowers to use assets like Bitcoin or USDC as collateral for a home loan without needing to liquidate them. The initiative, developed with Coinbase and Better, signals a step toward integrating crypto into mainstream housing finance while enabling buyers to maintain exposure to their holdings.
- A few other headlines include: David Sacks leaves his post for a broader White House tech role as legislation faces challenges, MARA sells 15,133 BTC for \$1.1 billion to fund a convertible note repurchase, and Hyperliquid ecosystem gains access to 260+ Ondo tokenized stocks via Felix.
- During the last 24 hours, the top three gainers were \$XCN, \$NIGHT, and \$ONDO, while the top three losers were \$RIVER, \$SIREN, and \$KITE.

**Markets Side with Iran’s Words, But Should They?**

Conflicting messages from US and Iranian leaders are fueling ongoing market anxiety. Overnight price action (the largest decline in risk assets since the conflict began a month ago) suggests that markets are giving more credence to Iranian statements than to those from the US. This is understandable given Trump’s history of hyperbole and flip-flops. However, should Iranian rhetoric be taken at face value? BCA Research offers a useful framework: it notes “if Iran continues to target shipping and energy infrastructure, then it is still not ready to negotiate. However, if it restricts its attacks to military targets or non-economic or symbolic targets, then we have likely entered the de-escalation phase of the conflict.”

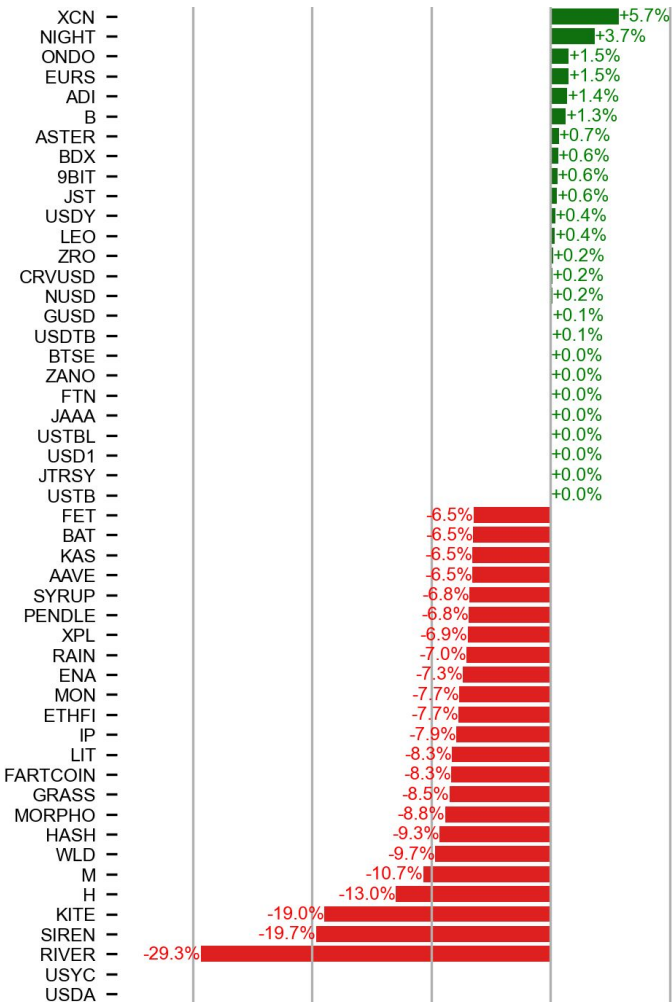
According to BCA’s Iran Conflict Daily Dashboard, Iran’s attacks on the UAE, an arguably key symbolic target, have dropped substantially in recent days. As is often the case, the truth likely lies somewhere between the two opposing narratives.



Source: BCA Research

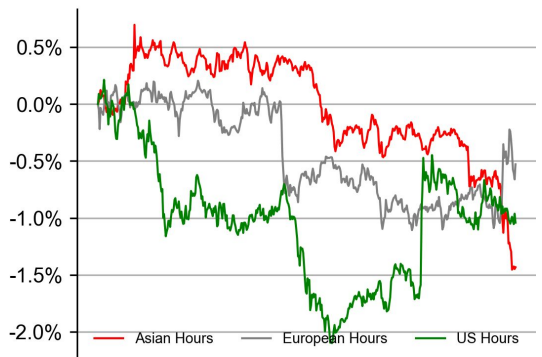
# PRICE ACTIONS

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

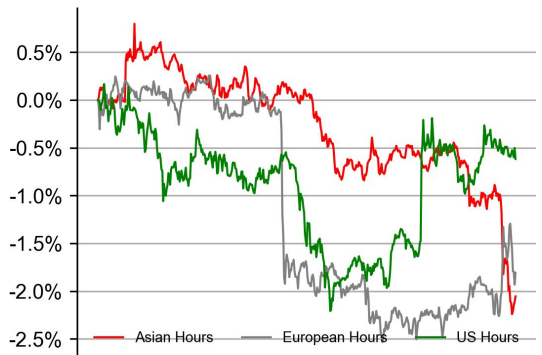


## Time Zone Analysis

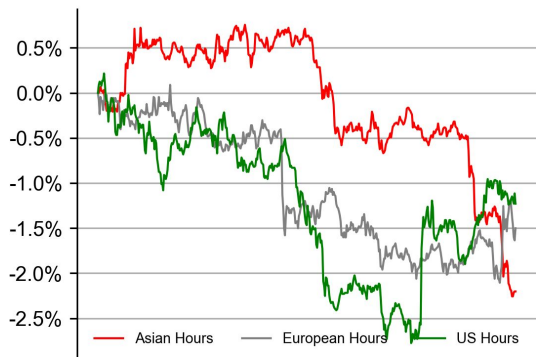
### BTC



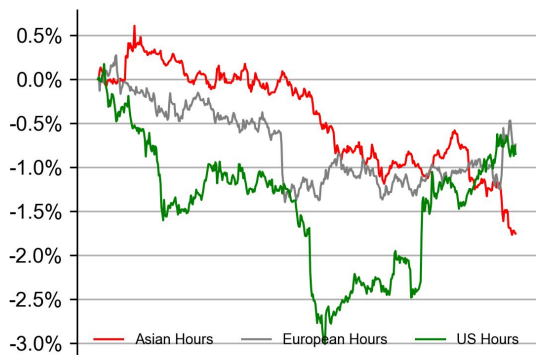
### ETH



### SOL

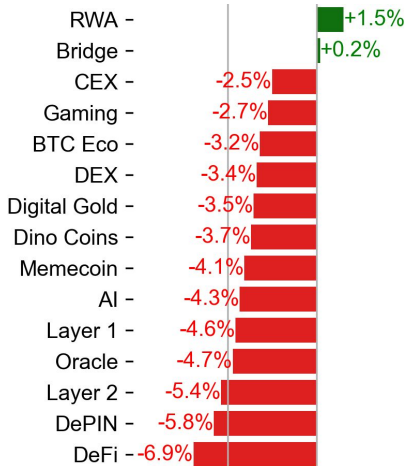
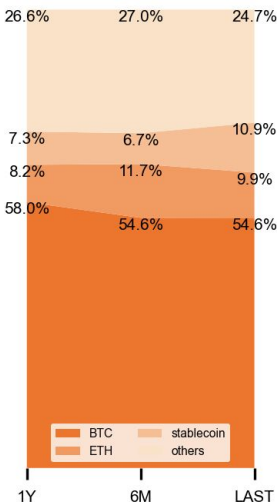


### XRP



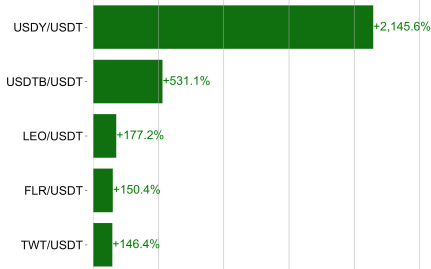
## Dominance Ratio

## Sector Performance

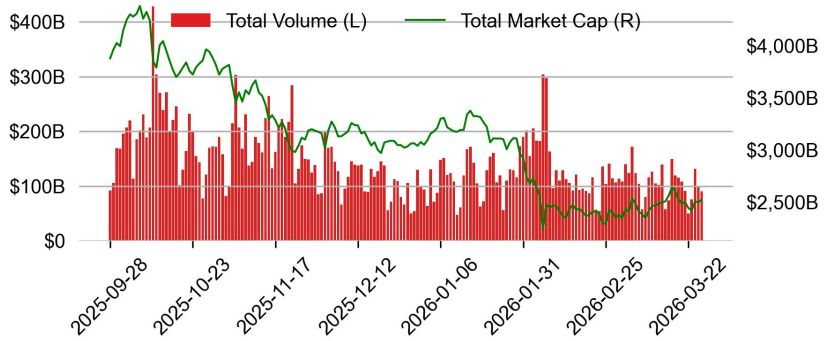


# TRADING VOLUME

## 24H Vol % Chg\*

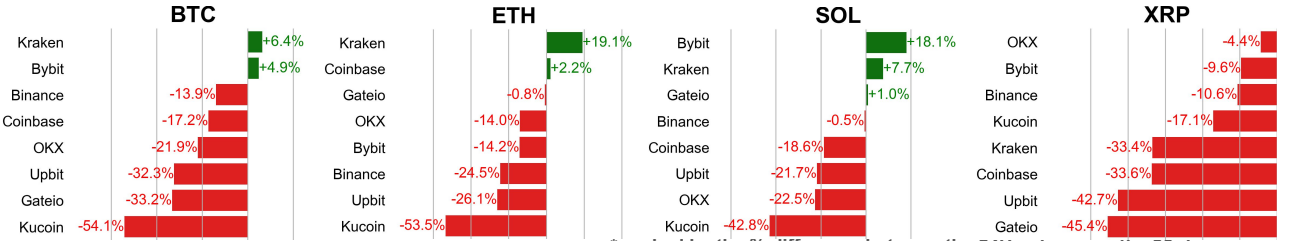


## Spot Volume



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

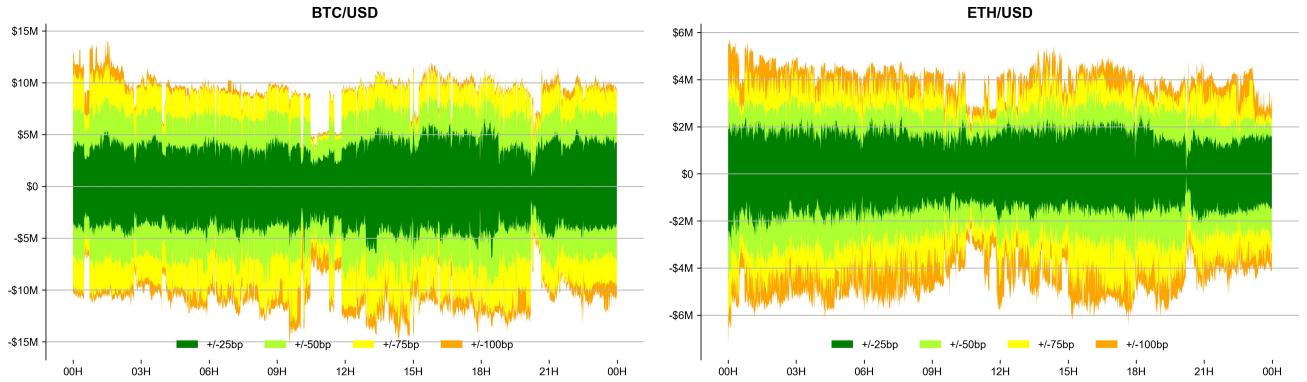
## Spot Volume Leaders (% chg vs ave)\*



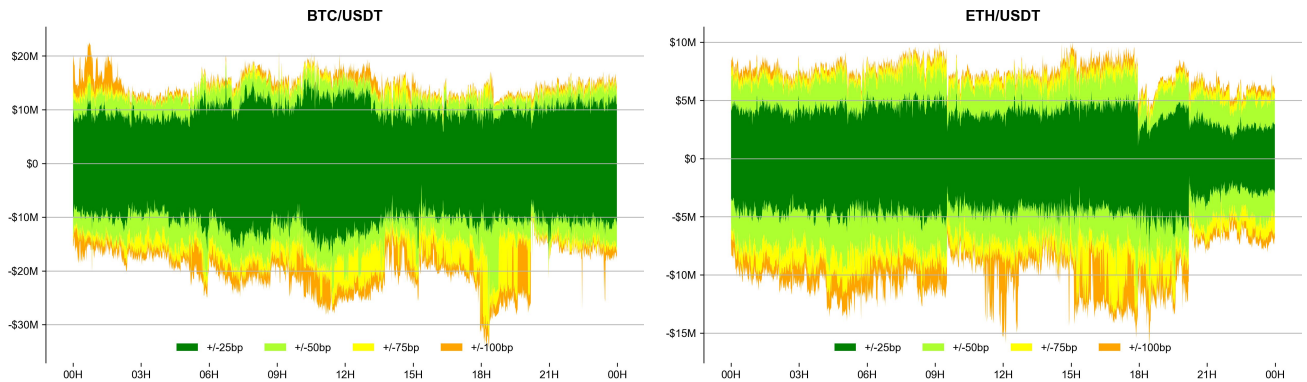
\* ranked by the % difference between the 24H volume vs. the 30-day average

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

### Coinbase



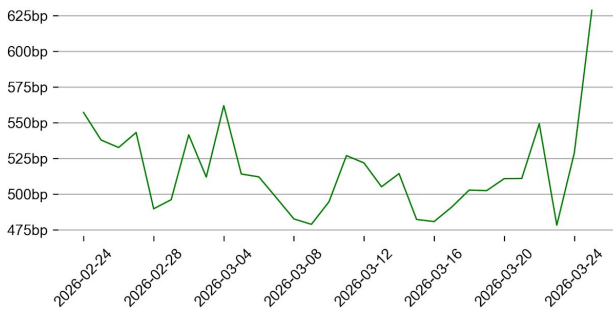
### Binance



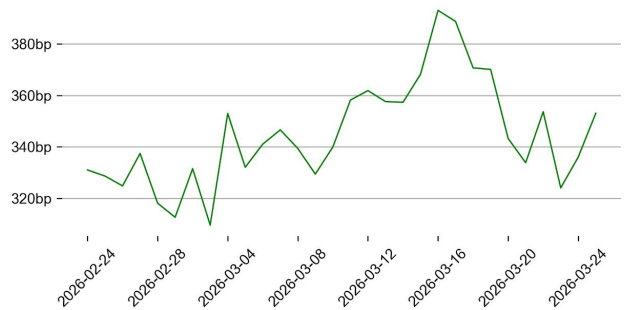
# DERIVATIVES

## Open Interest / Market Cap

### BTC

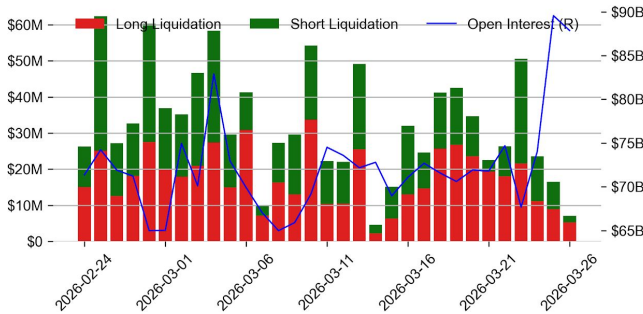


### ETH

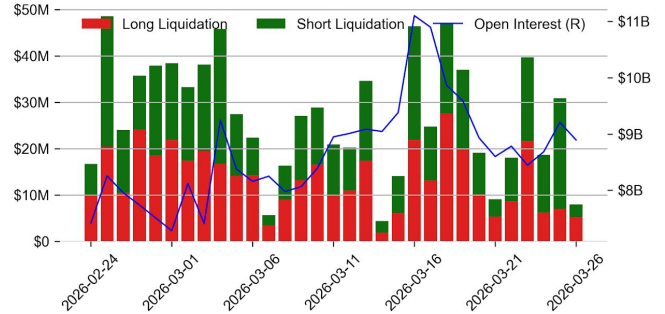


## Futures O.I. & Liquidations

### BTC

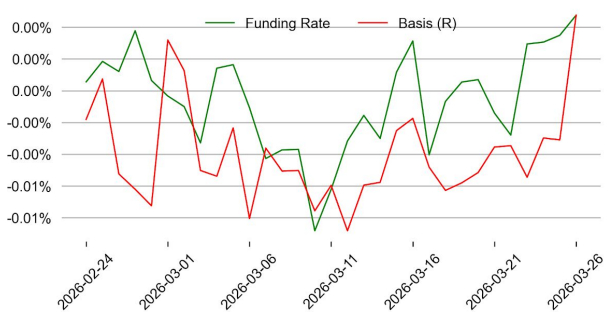


### ETH

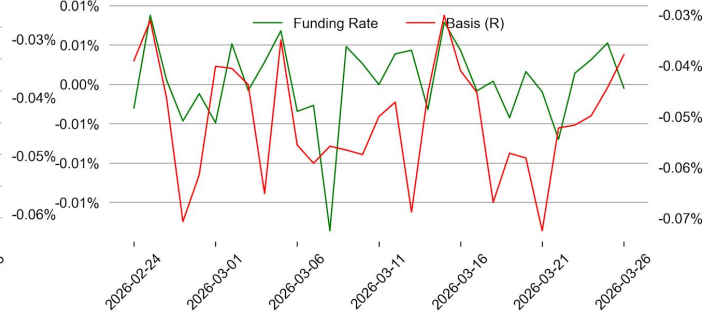


## Perps Funding Rate & Rolling Basis

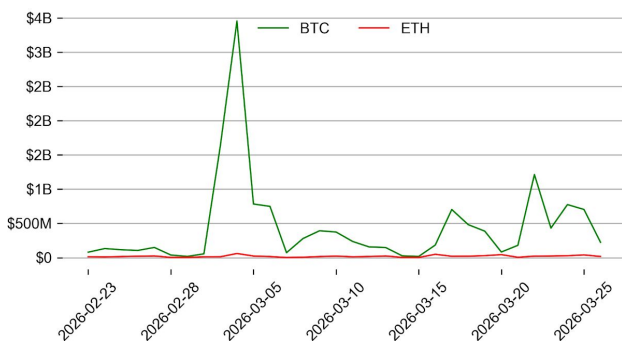
### BTC



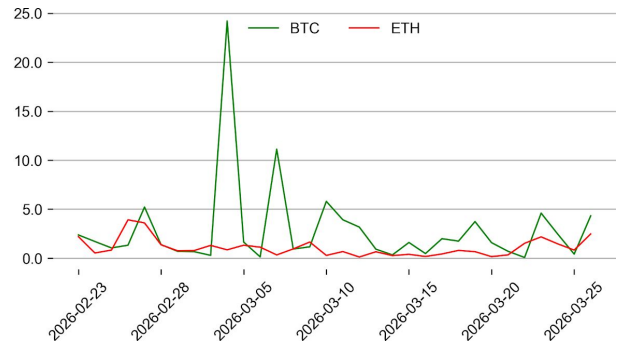
### ETH



## Option Volume



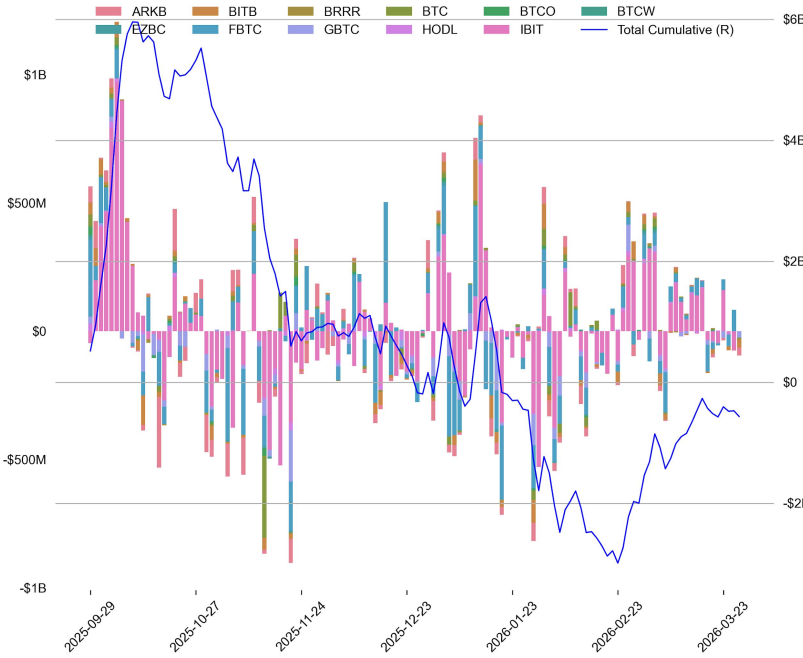
## Put Call Ratio



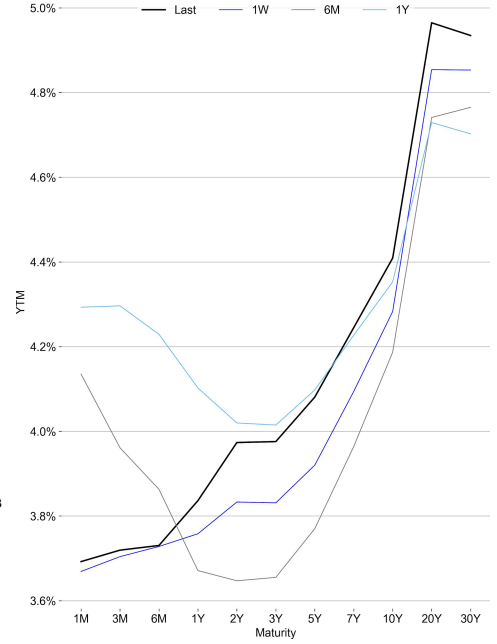
# TRADFI

	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	6477.10	21408.08	5563.05	24856.43	4477.53	0.8669	159.73	6.9115	99.89	93.25	4431.62	173.31	132.88	8.57	14.01
1D	-1.7%	-2.4%	-1.5%	-1.9%	-1.3%	0.2%	0.2%	0.1%	0.3%	3.2%	-3.4%	-4.3%	-4.5%	3.5%	-7.6%
1M	-6.0%	-6.4%	-9.0%	-6.5%	-4.9%	2.1%	2.5%	0.4%	2.1%	42.1%	-14.1%	7.0%	6.6%	6.5%	-15.1%
1Y	13.4%	19.6%	2.8%	5.8%	14.2%	-6.8%	6.1%	-4.9%	-4.5%	33.9%	45.9%	-10.6%	-59.6%	-37.9%	77.3%

## BTC Spot ETF Flow

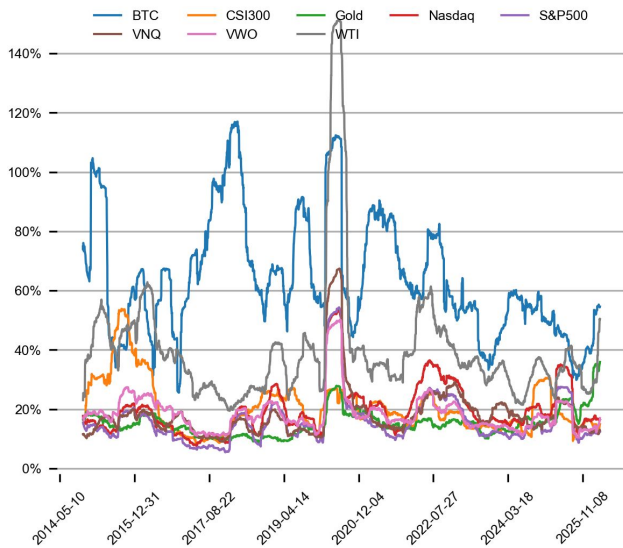


## US Treasury Yield Curve

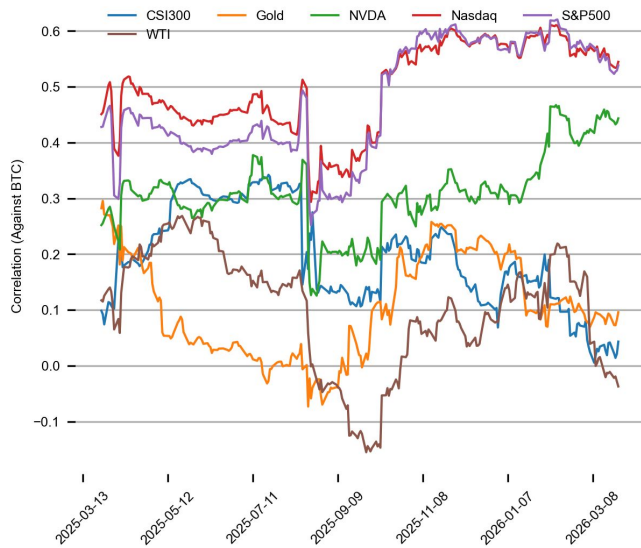


## CROSS ASSET METRICS

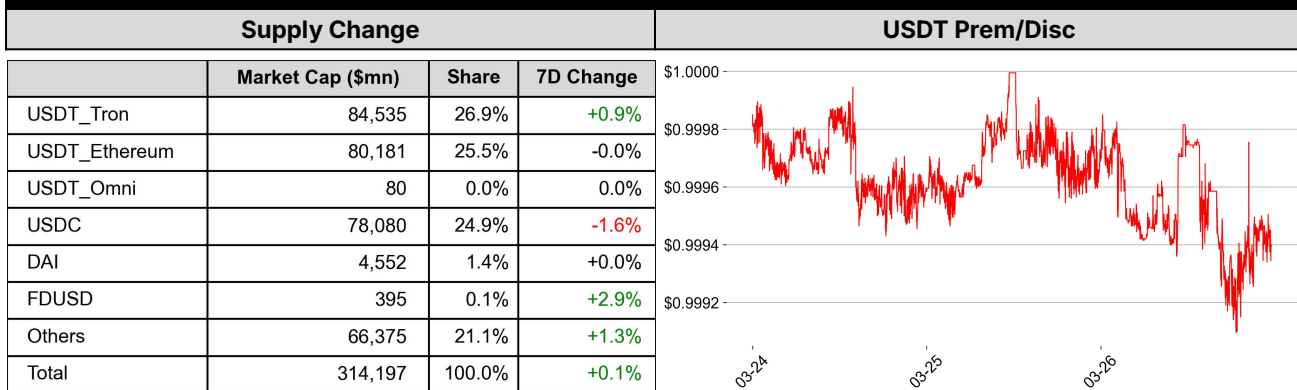
### Volatility



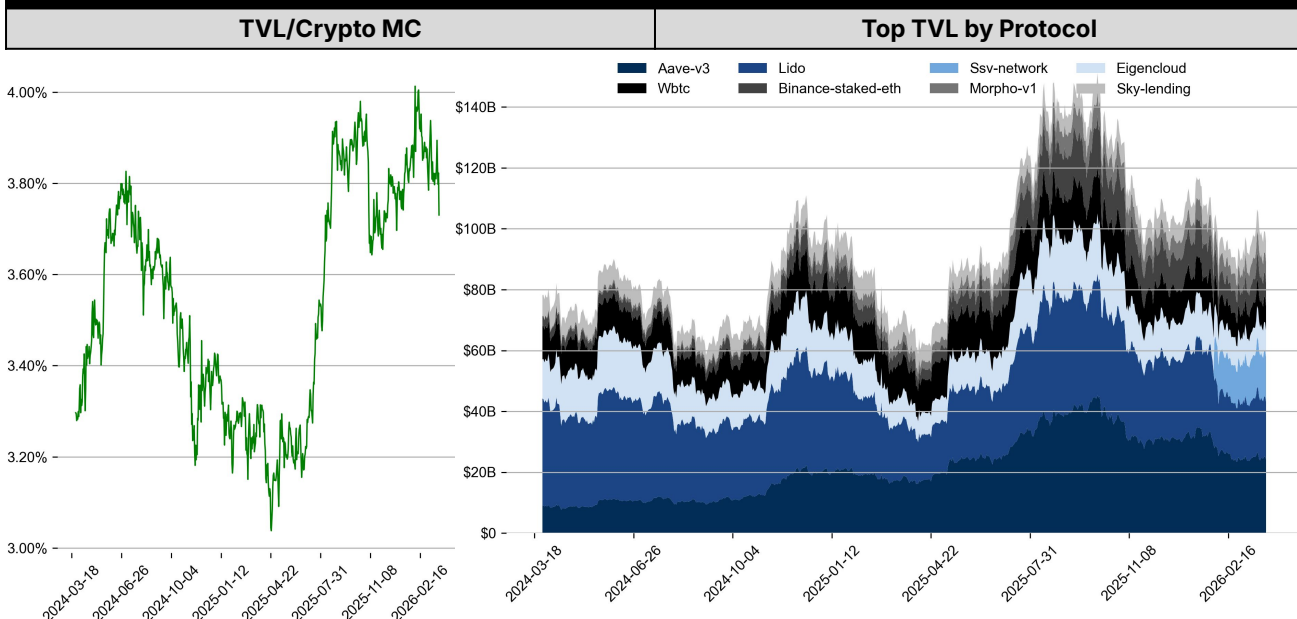
### Correlation



## STABLECOIN



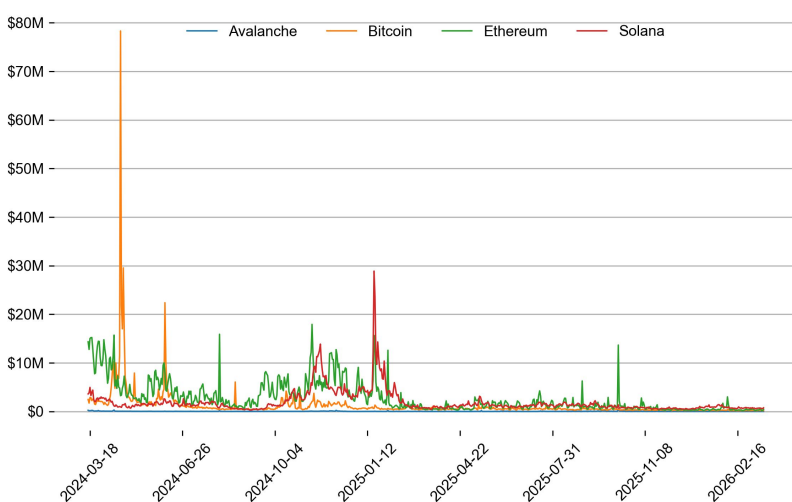
## ONCHAIN MOVES



### Top TVL Gainers\*

#	Name	7D Change
1	Babylon Protocol	+88.1%
2	Dolomite	+41.1%
3	Doppler Finance	+30.9%
4	Mellow Core	+23.2%
5	Spark Liquidity Layer	+18.0%

### Daily Network Fees



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

**EVENTS CALENDAR**

<b>Date</b>	<b>Title</b>	<b>Coins / Hosts</b>
Mar 5, 2026	US ISM Non-Manufacturing Prices	
Mar 5, 2026	\$18.35M Unlock	\$ENA
Mar 6, 2026	US Unemployment Rate	
Mar 6, 2026	\$308.61M Unlock	\$HYPE
Mar 9, 2026	\$3.65M Unlock	\$MOVE
Mar 10, 2026	\$4.48M Unlock	\$LINEA
Mar 11, 2026	US CPI	
Mar 16, 2026	NVIDIA GTC Conference	
Mar 16, 2026	Upbit Bithumb Delisting	\$FLOW
Mar 16, 2026	\$9.59M Unlock	\$ARB
Mar 18, 2026	US FOMC	
Mar 20, 2026	\$43.7M Unlock	\$ZRO
Mar 20, 2026	\$5.88M Unlock	\$KAITO
Mar 23, 2026	\$3.69M Unlock	\$SOON
Mar 25, 2026	\$8.60M Unlock	\$PARTI
Mar 27, 2026	Bithumb Delisting	NIERO
Mar 28, 2026	Upbit Delisting	\$DENT

## DATA EXPLAINER

Headers	Source	Note
<b>PRICE ACTIONS TRADING VOLUME ORDER BOOK DEPTH DERIVATIVES</b>	Presto Labs	<p><b>Time Zone Analysis</b> 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"> <li>- Asia: UTC 22:00 -1 to UTC 6:00</li> <li>- Europe: UTC 6:00 to 14:00</li> <li>- US: UTC 14:00 to 22:00</li> </ul> <p><b>Sector</b> 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><b>Exchanges:</b> 24H spot price &amp; 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>
<b>TRADFI</b>	Investing.com Farside Investors	<p><b>BTC Spot ETF Flows</b> 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>
<b>STABLECOIN ONCHAIN MOVES</b>	DefiLlama	<p><b>Stablecoin Supply</b> is a proxy for fiat on/off ramp from TradFi into crypto.</p> <p><b>USDT Prem/Disc</b> 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><b>TVL/ Crypto MC Ratio</b> = Total Value Locked / Crypto Market Cap. The ratio neutralizes the TVL changes caused by asset price fluctuations.</p>
<b>EVENTS CALENDAR</b>	CoinMarketCap Investing.com	<p><b>Events Calendar</b> 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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