

Daily Market Brief
Mar 30, 2026 (UTC -02:00)

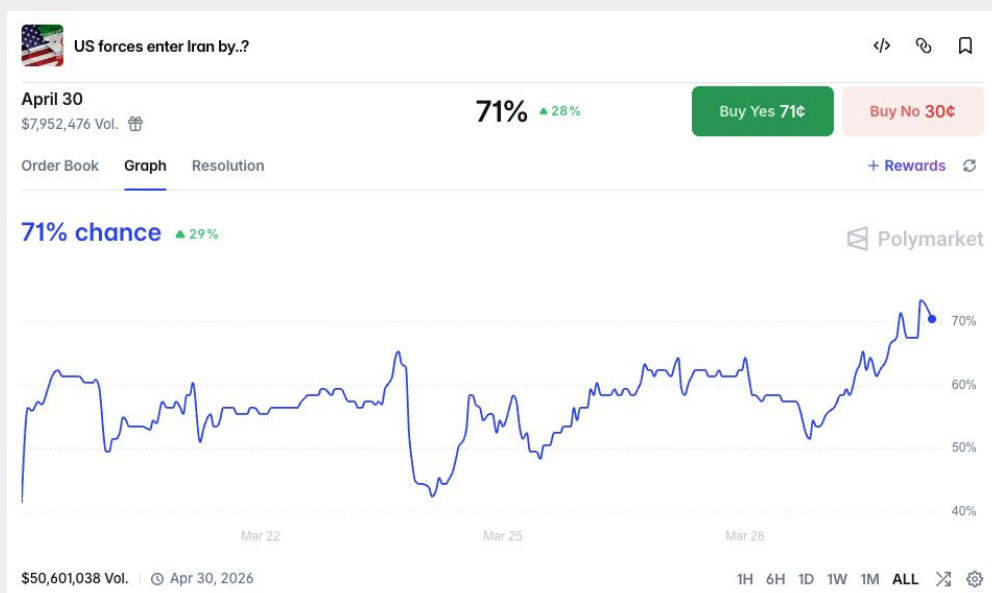
Peter Chung | Head of Research
Min Jung | Research Associate

BTC	\$65,994.62 -0.6%	S&P500	6,368.85 -1.7%	US 10Y	4.4140% -0.0260PPT	WTI	\$102.80 +3.2%
ETH	\$1,983.84 -0.5%	Nasdaq	20,948.36 -2.1%	DXY	100.31 +0.2%	Gold	\$4,477.20 -0.7%

- Market once again slides amid Middle East uncertainty. As of now, \$BTC is trading at \$65,994 and \$ETH is trading at \$1,983. Bitcoin dominance stands at 58.35%.
- This week’s calendar includes Powell speaking on Monday, U.S. Manufacturing PMI on Wednesday, and U.S. Nonfarm Payrolls on Friday. All eyes remain on Middle East developments.
- A few headlines over the weekend include: World Foundation subsidiary sells \$65 million in WLD tokens through OTC deals as the token hits an all-time low; Lido DAO proposes a \$20 million one-off LDO buyback as the token hovers near an all-time low; and Strategy may have paused Bitcoin accumulation last week, ending a thirteen-week buying streak.
- During the last 24 hours, the top three gainers were \$SENT, \$SIREN, and \$VVV, while the top three losers were \$HASH, \$CFX, and \$BCH.

Rising War Risks Hit BTC as Ceasefire Efforts Stall

Last week, the apparent "TACO" trade lost momentum as attempts at unilateral de-escalation (5-day delay, ceasefire proposal, 10-day delay) faltered. In an environment where the near-term price action depends on one binar viable (i.e., the duration of the war), prediction markets paint a gloomy picture. The odds of U.S. forces entering Iran in April has risen sharply over the weekend on Polymarket, following reports of a U.S. military build-up for potential ground operations. Prolonged brinkmanship on both sides risks lasting disruption to critical supply chains, tilting the global economy closer to chaos. BTC’s weekend price action is clear evidence of this tension.

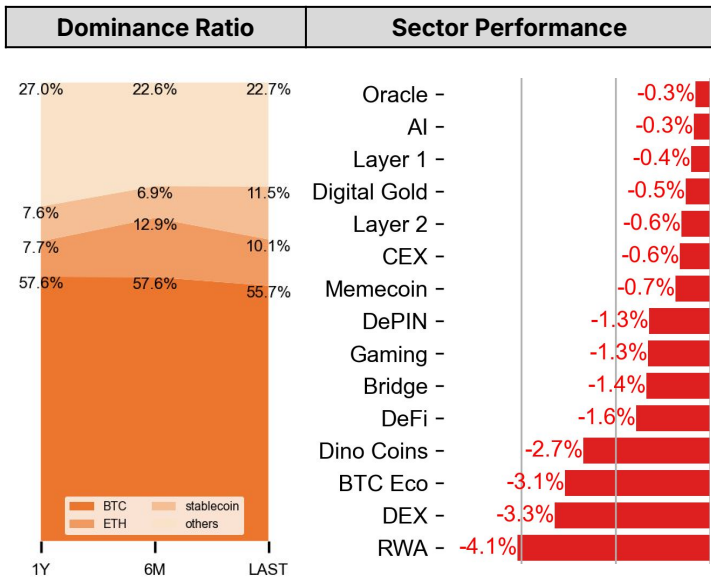
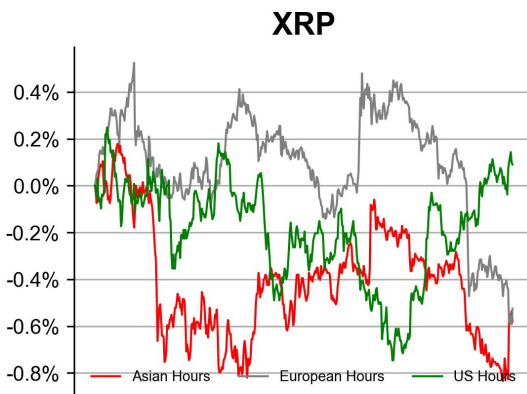
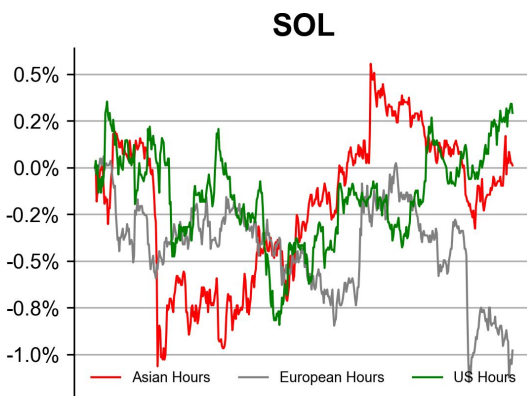
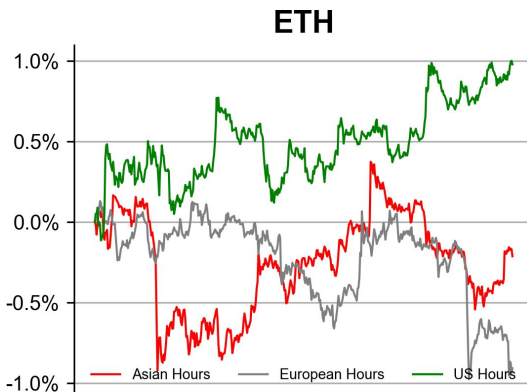
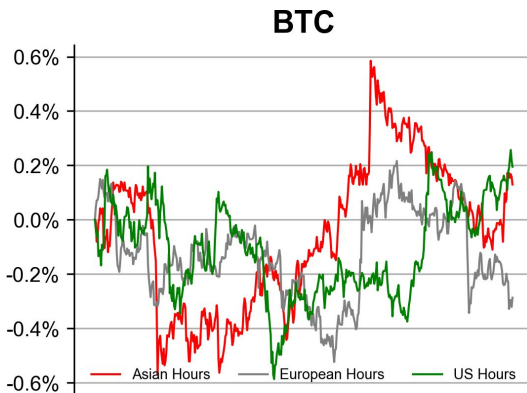
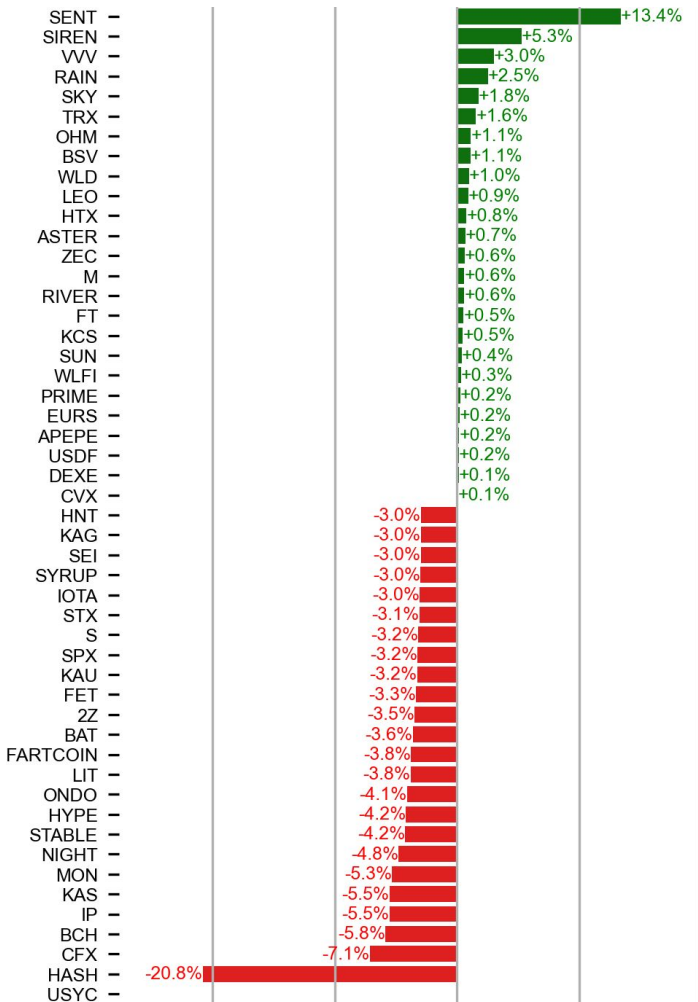


Source: Polymarket

PRICE ACTIONS

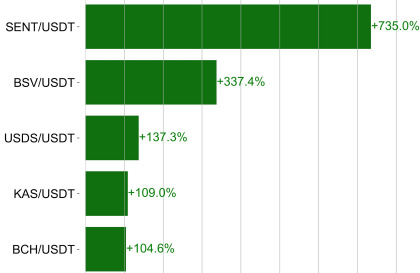
24H Price Change (Top/Bottom 25 from Top 200)

Time Zone Analysis

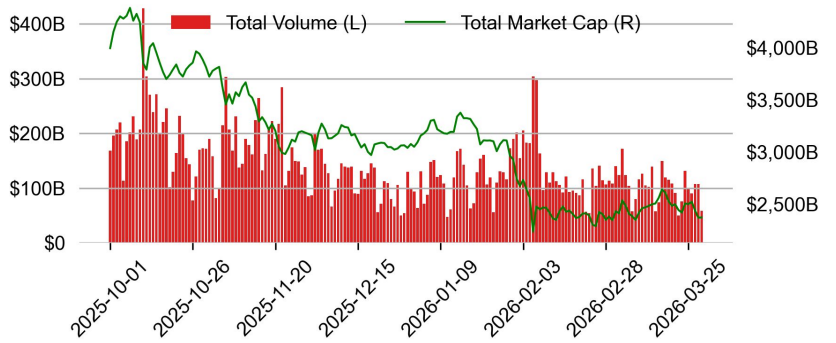


TRADING VOLUME

24H Vol % Chg*

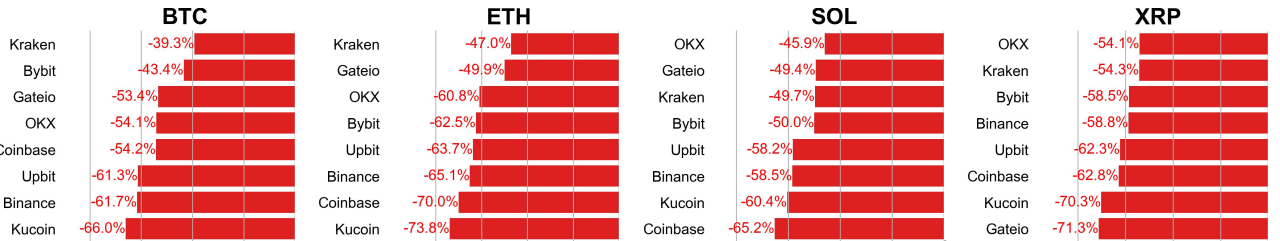


Spot Volume



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

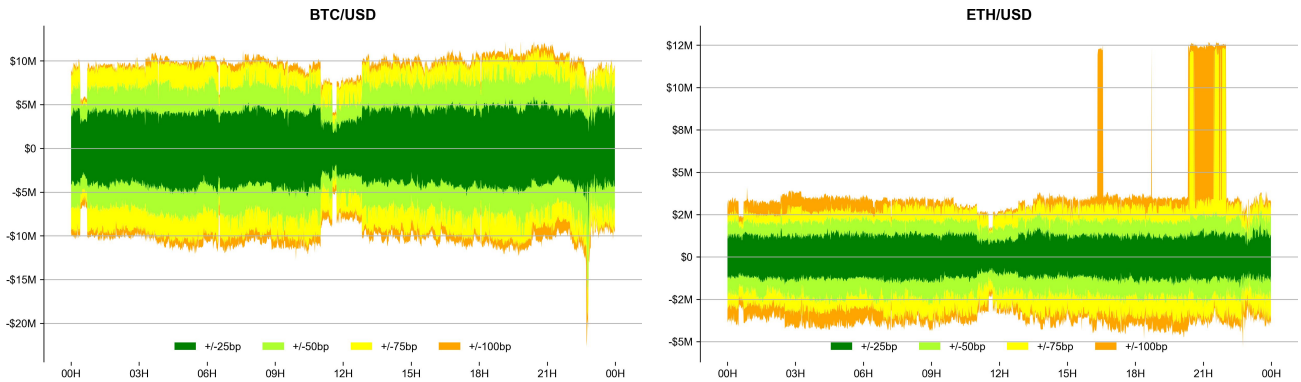
Spot Volume Leaders (% chg vs ave)*



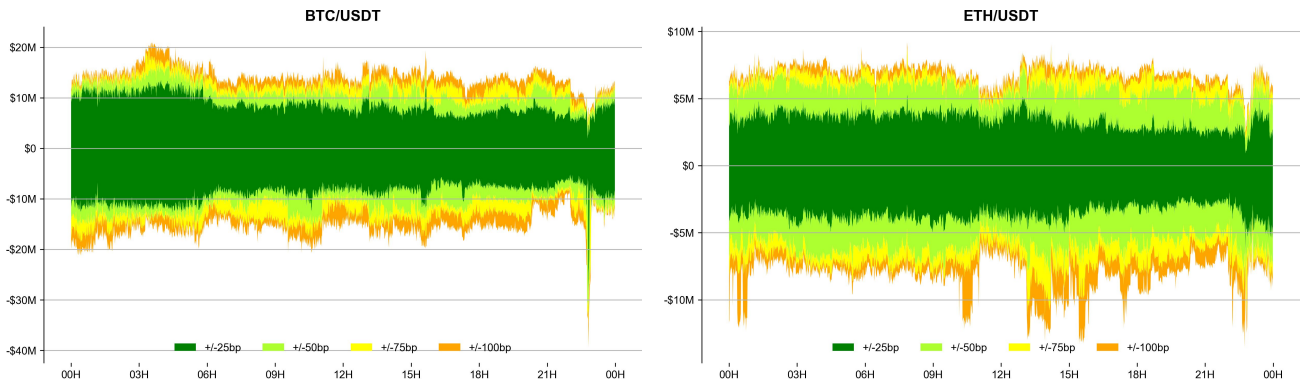
* ranked by the % difference between the 24H volume vs. the 30-day average

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

Coinbase

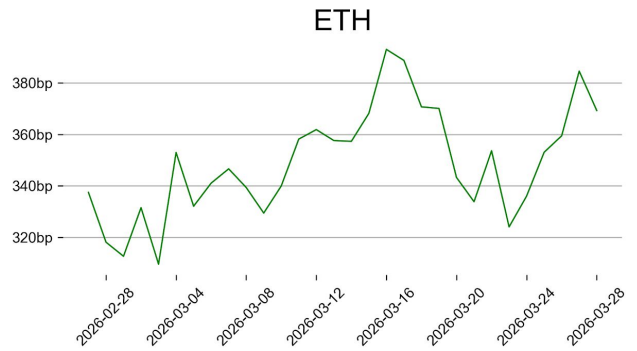
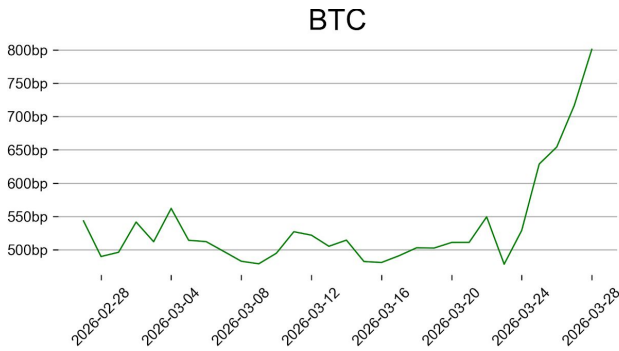


Binance

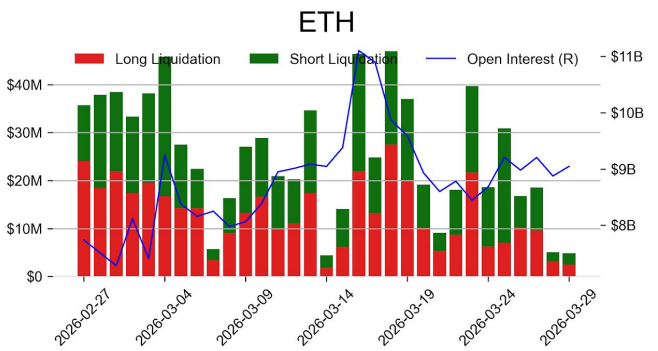
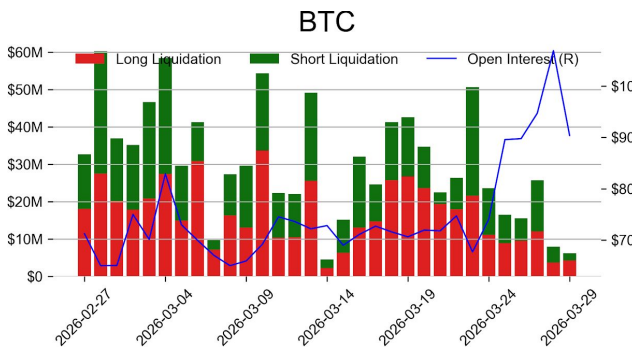


DERIVATIVES

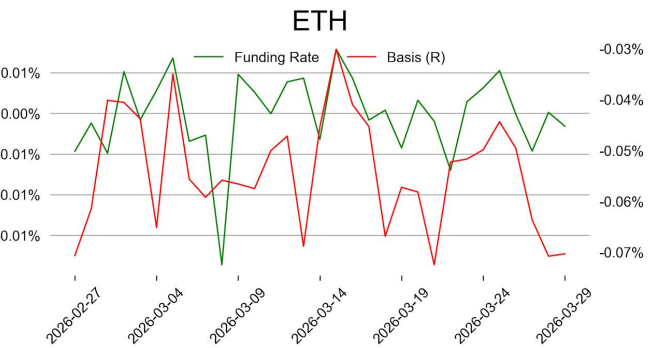
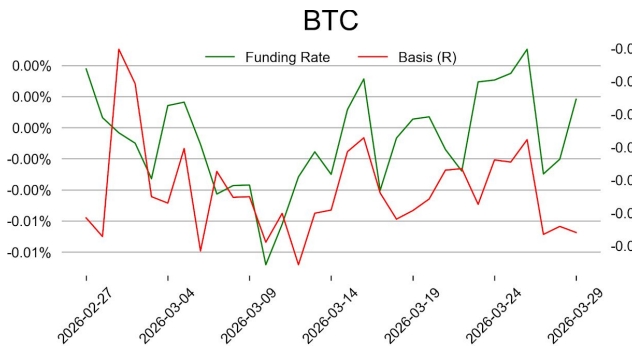
Open Interest / Market Cap



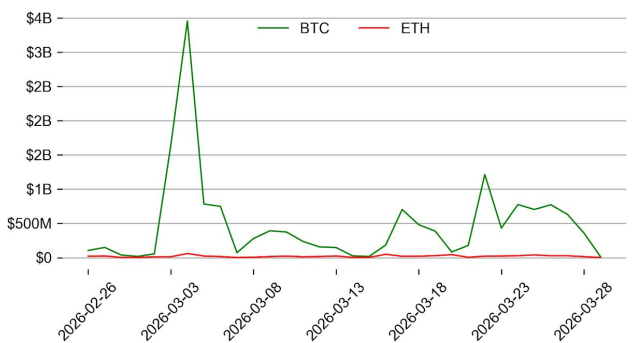
Futures O.I. & Liquidations



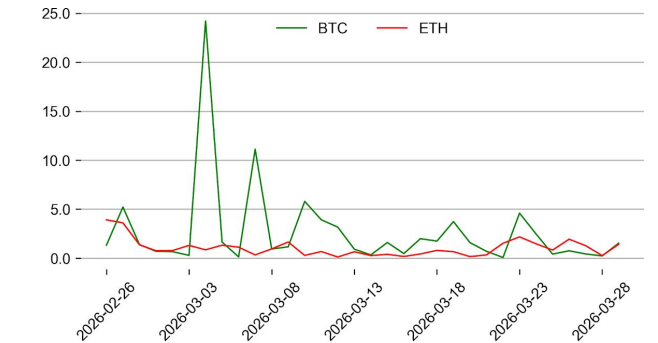
Perps Funding Rate & Rolling Basis



Option Volume



Put Call Ratio



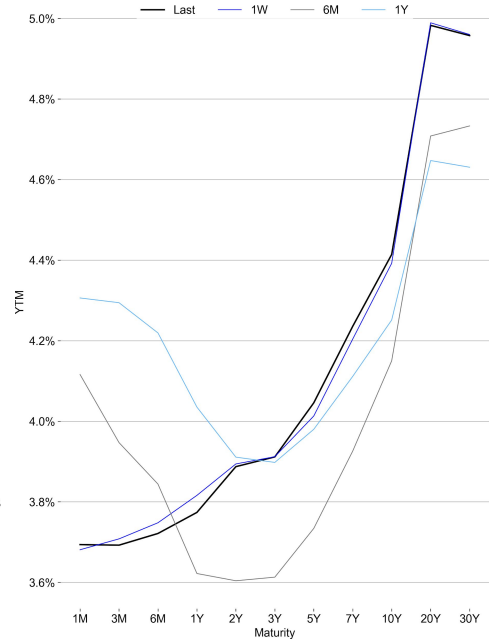
TRADFI

	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	6368.85	20948.36	5505.80	24951.88	4502.57	0.8702	160.24	6.9118	100.31	102.80	4477.20	161.14	126.03	8.02	12.80
1D	-1.7%	-2.1%	-1.1%	0.4%	0.6%	0.2%	-0.0%	0.0%	0.2%	3.2%	-0.7%	-7.1%	-5.2%	-6.5%	-8.6%
1M	-8.3%	-9.5%	-10.8%	-6.8%	-4.9%	2.8%	2.7%	0.6%	2.8%	53.4%	-14.7%	-12.4%	-7.1%	-6.4%	-25.1%
1Y	11.9%	17.7%	2.3%	5.8%	14.5%	-5.8%	7.0%	-4.9%	-3.6%	48.2%	43.8%	-14.6%	-61.2%	-41.2%	64.7%

BTC Spot ETF Flow

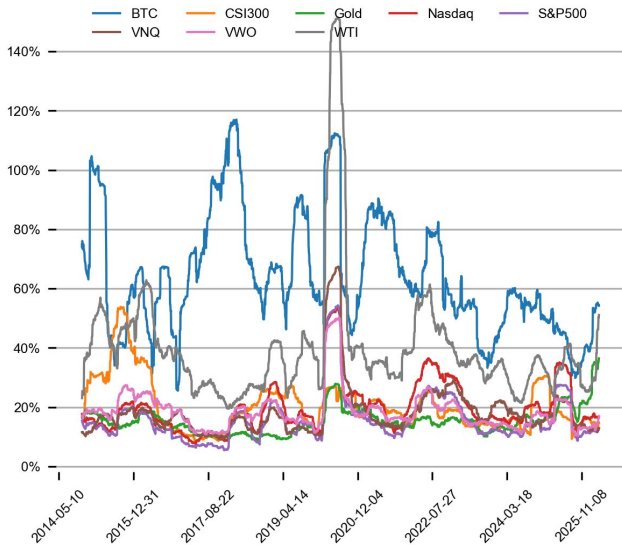


US Treasury Yield Curve

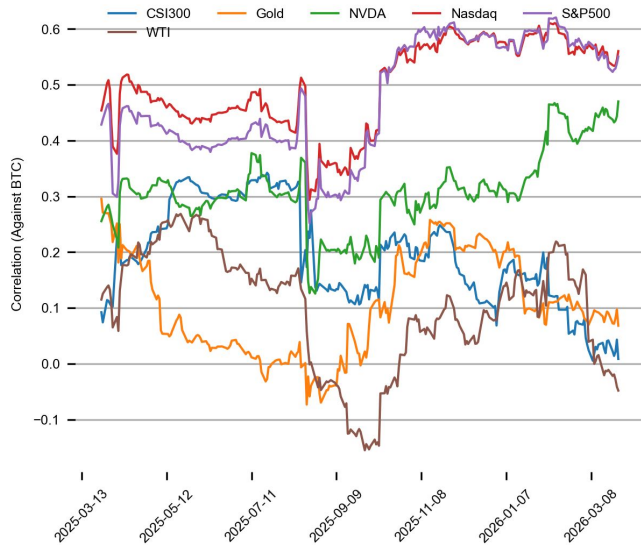


CROSS ASSET METRICS

Volatility



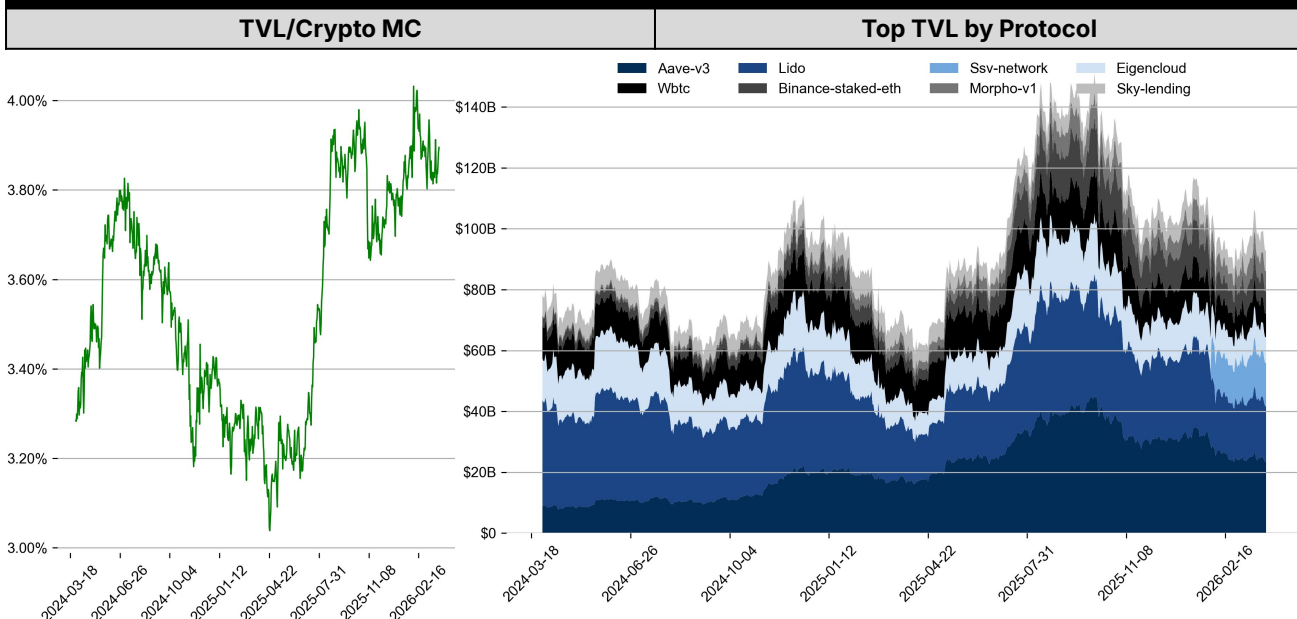
Correlation



STABLECOIN

Supply Change				USDT Prem/Disc
	Market Cap (\$mn)	Share	7D Change	
USDT_Trone	84,512	26.9%	-0.2%	
USDT_Ethereum	80,186	25.5%	-0.1%	
USDT_Omni	80	0.0%	0.0%	
USDC	77,579	24.7%	-1.8%	
DAI	4,574	1.5%	+0.0%	
FDUSD	397	0.1%	+3.3%	
Others	66,901	21.3%	+1.6%	
Total	314,229	100.0%	-0.2%	

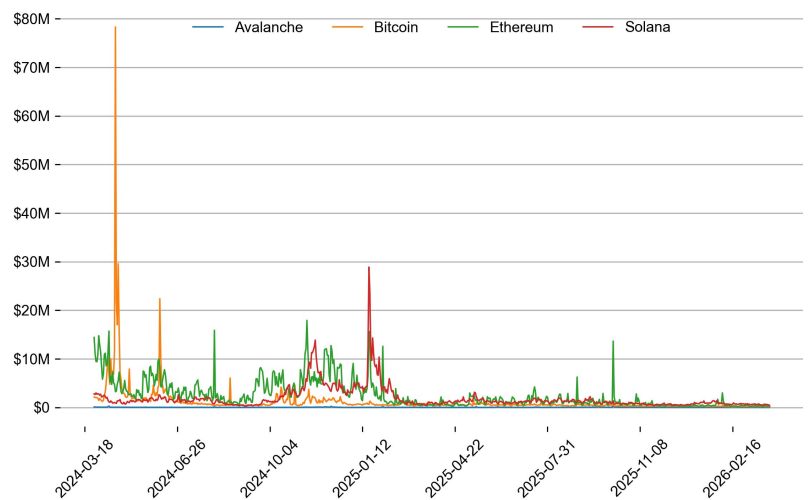
ONCHAIN MOVES



Top TVL Gainers*

Daily Network Fees

#	Name	7D Change
1	Venus Flux	+1,629.1%
2	Babylon Protocol	+93.3%
3	USDD	+83.1%
4	OpenEden TBILL	+71.1%
5	edgeX Bridge	+44.1%



* 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
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
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), L0(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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