

Daily Market Brief
Mar 24, 2026 (UTC -02:00)

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BTC	\$70,908.52 +4.5%	S&P500	6,581.04 +1.1%	US 10Y	4.3350% -0.0770PPT	WTI	\$89.47 -9.3%
ETH	\$2,152.15 +4.8%	Nasdaq	21,946.76 +1.4%	DXY	99.18 -0.4%	Gold	\$4,475.41 -0.5%

- The crypto market is up following Trump’s comments. As of now \$BTC is trading at \$70,908 and \$ETH is trading at \$2,152. Bitcoin dominance stands at 59.07%.
- Trump said the U.S. and Iran have reached a partial agreement and delayed potential strikes for five days, easing immediate tensions and pushing oil prices lower. However, Iran denied any talks and signaled possible retaliatory actions, as the conflict’s death toll across Iran and Lebanon continues to rise into the thousands.
- A few other headlines include: lawmakers to introduce a bipartisan bill banning sports bets on prediction markets, Strategy has acquired 1,031 \$BTC for ~\$76.6 million at ~\$74,326 per \$BTC, and Circle urges the EU to fast-track DLT reforms and expand stablecoin settlement rules.
- During the last 24 hours, the top three gainers were \$UDS, \$JTO, and \$HNT, while the top three losers were \$RIVER, \$HASH, and \$KAS.

Trump's Iran Blink Sparks Relief Rally Preview

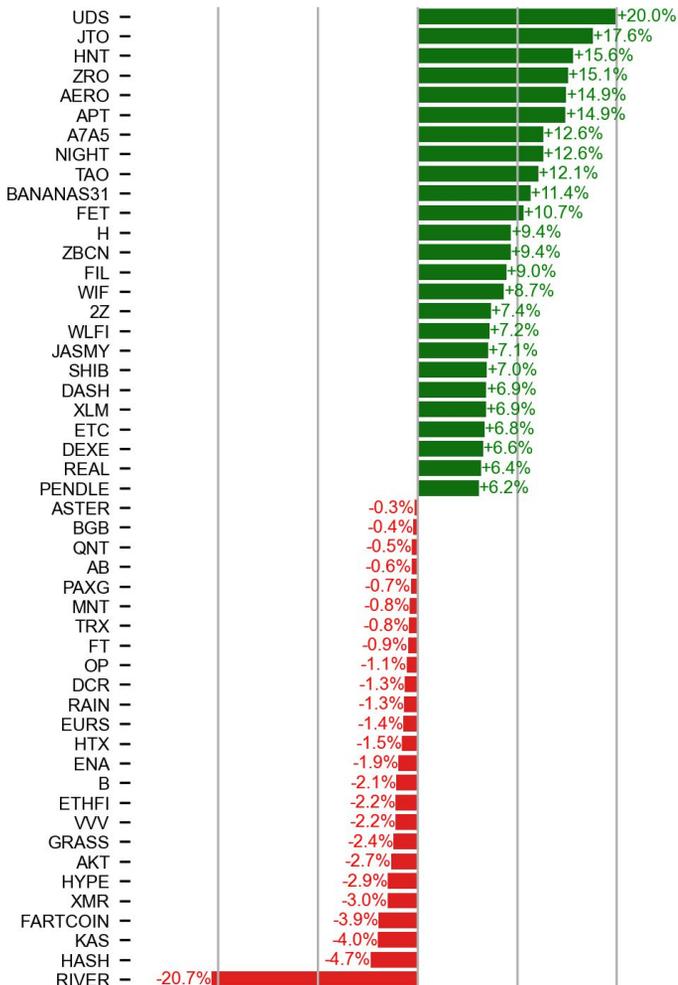
Trump’s announcement of potential ceasefire talks with Iran, whether credible or not, underscores one thing, according to BCA Research: if the war continues, the global economy could quickly spiral into a pandemic-style shutdown, and Trump is acutely aware of that risk. Financial stress is already building, with high-yield spreads widening and bond-market volatility rising. Political stress is mounting too, as Polymarket odds for a Democratic sweep in the midterm elections have surged, reflecting the conflict’s unpopularity with voters. Most importantly, last night’s price action offered a preview of how markets might respond if the conflict ends, with BTC likely to be the fastest horse in a broader risk-asset rally.



Source: Bloomberg

PRICE ACTIONS

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

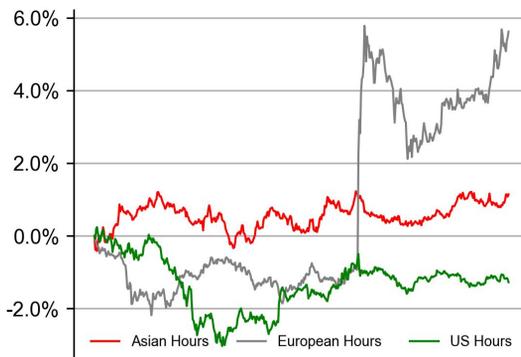


Time Zone Analysis

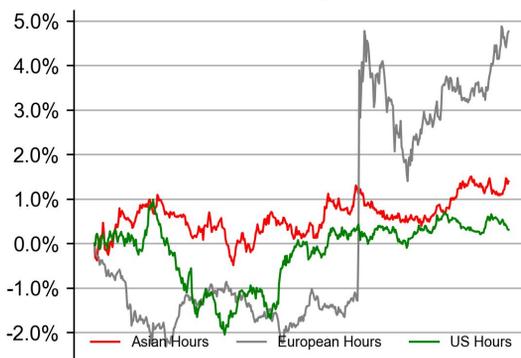
BTC



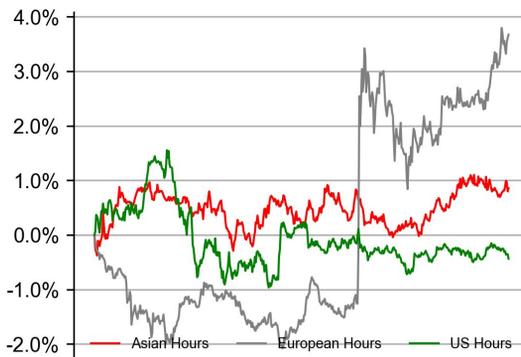
ETH



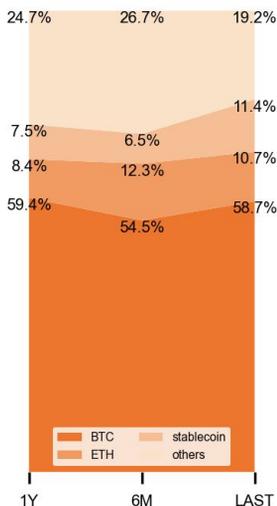
SOL



XRP



Dominance Ratio

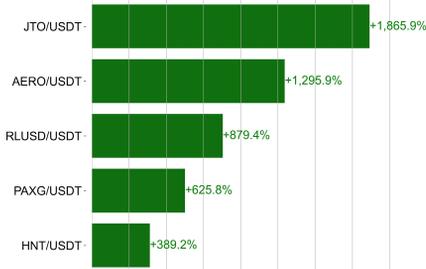


Sector Performance

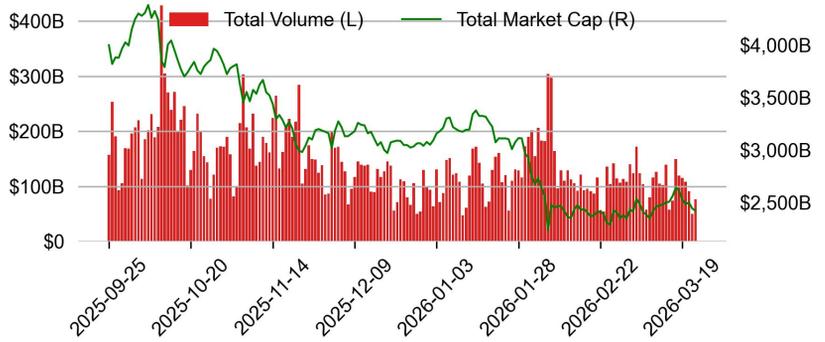


TRADING VOLUME

24H Vol % Chg*

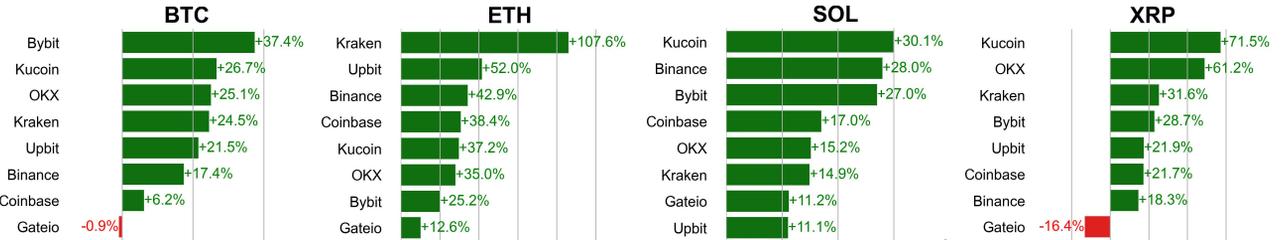


Spot Volume



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

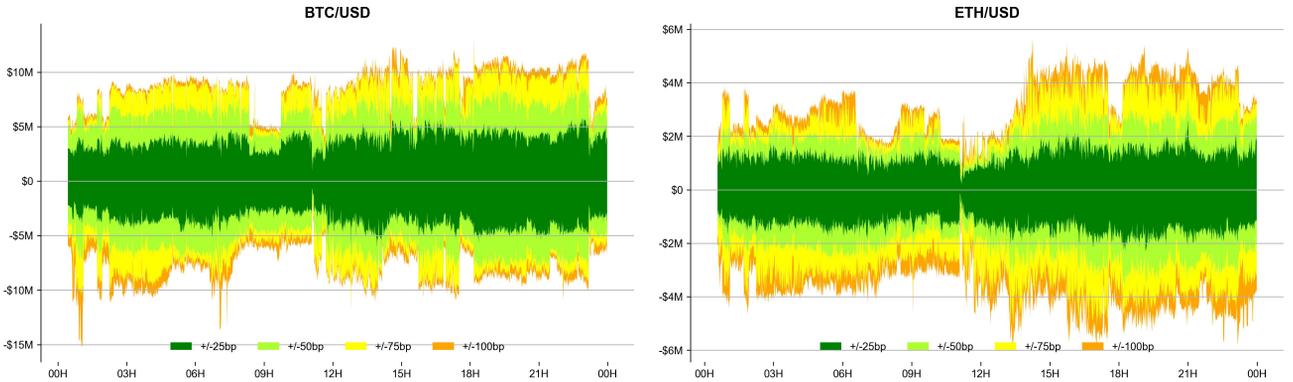
Spot Volume Leaders (% chg vs ave)*



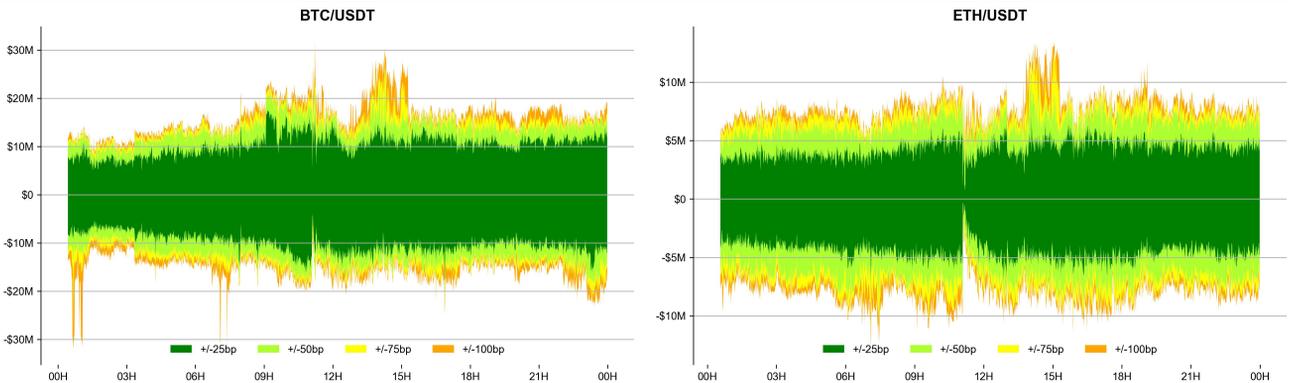
* ranked by the % difference between the 24H volume vs. the 30-day average

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

Coinbase

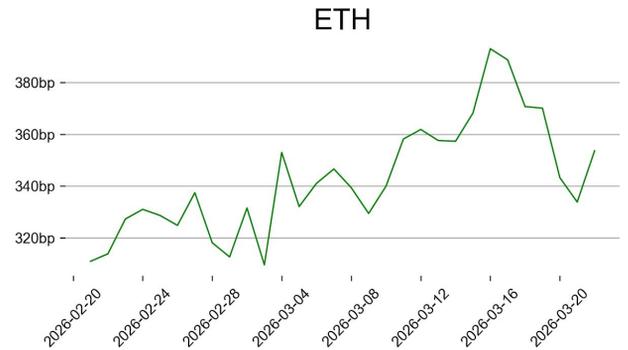
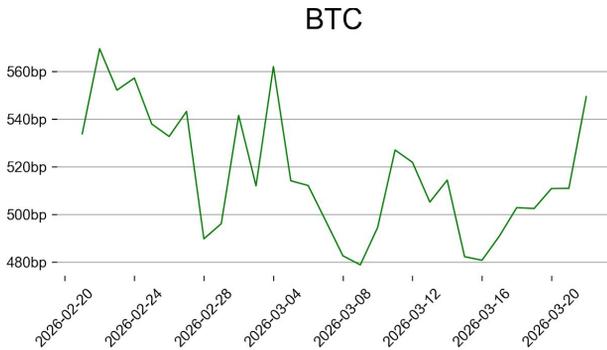


Binance

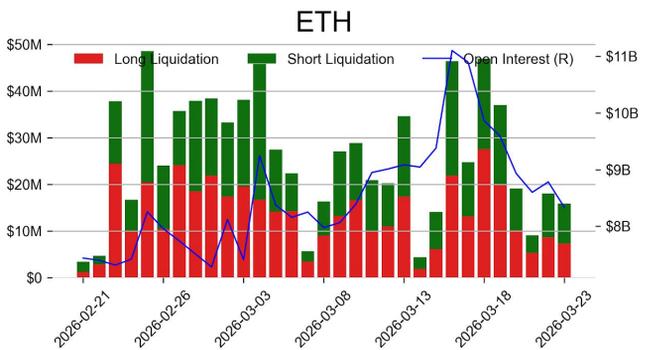
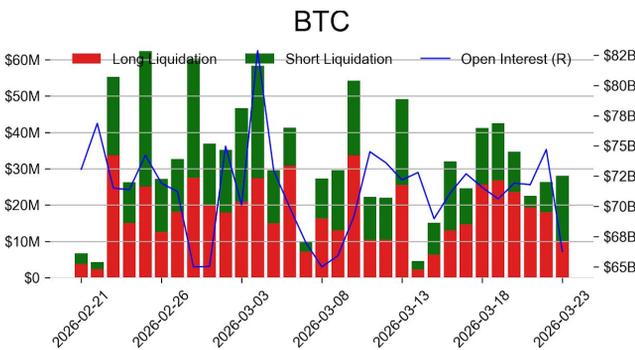


DERIVATIVES

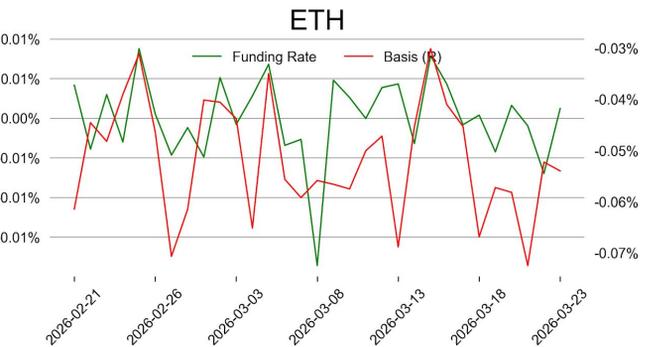
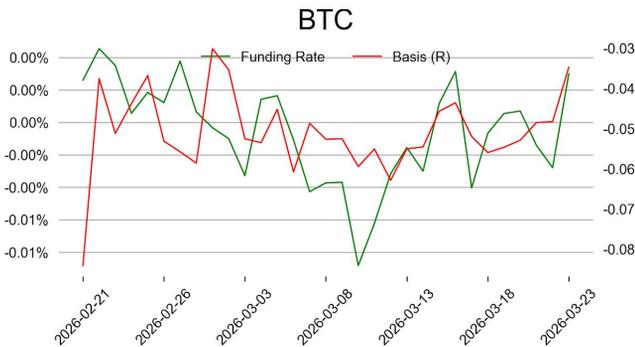
Open Interest / Market Cap



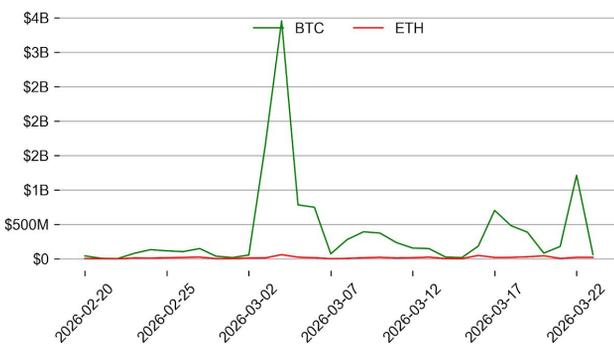
Futures O.I. & Liquidations



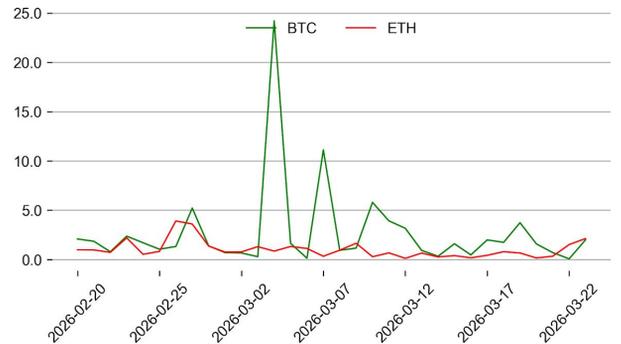
Perps Funding Rate & Rolling Basis



Option Volume



Put Call Ratio



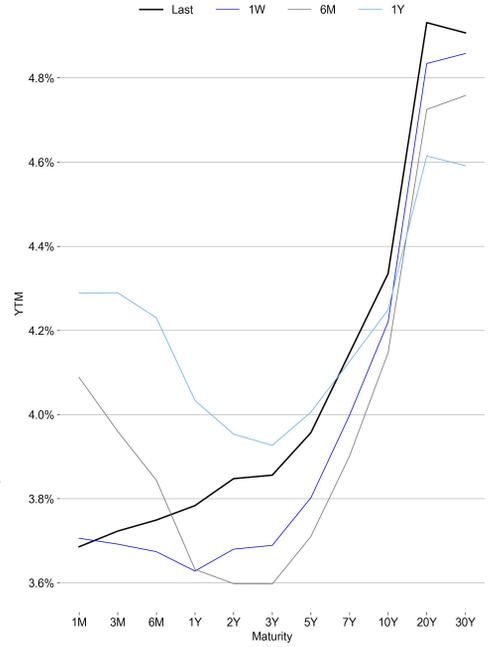
TRADFI

	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	6581.04	21946.76	5579.25	24382.47	4418.00	0.8615	158.49	6.8813	99.18	89.47	4475.41	200.59	138.20	8.90	14.36
1D	1.1%	1.4%	1.4%	-3.5%	-3.3%	-0.4%	-0.4%	-0.1%	-0.4%	-9.3%	-0.5%	1.6%	1.9%	5.2%	7.3%
1M	-4.8%	-4.1%	-9.0%	-7.7%	-5.2%	1.5%	2.2%	-0.4%	1.4%	34.8%	-11.9%	17.1%	5.5%	11.7%	-8.4%
1Y	16.1%	23.4%	2.9%	2.9%	12.9%	-6.8%	6.1%	-5.1%	-4.7%	31.0%	46.8%	5.7%	-54.5%	-28.1%	80.6%

BTC Spot ETF Flow

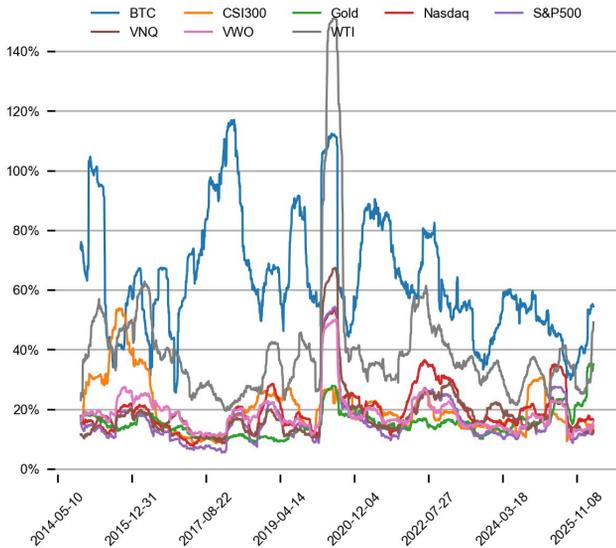


US Treasury Yield Curve

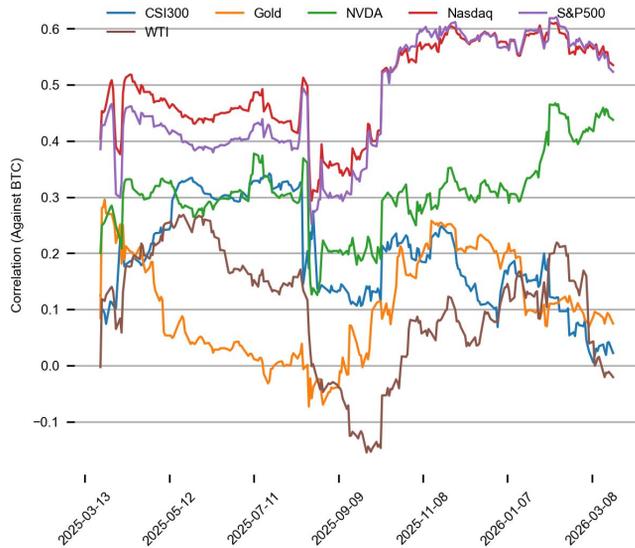


CROSS ASSET METRICS

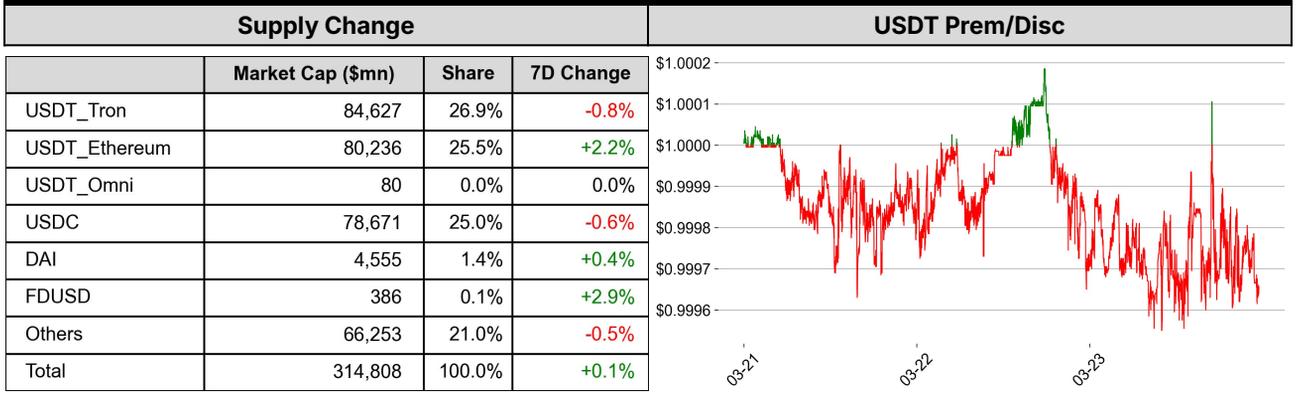
Volatility



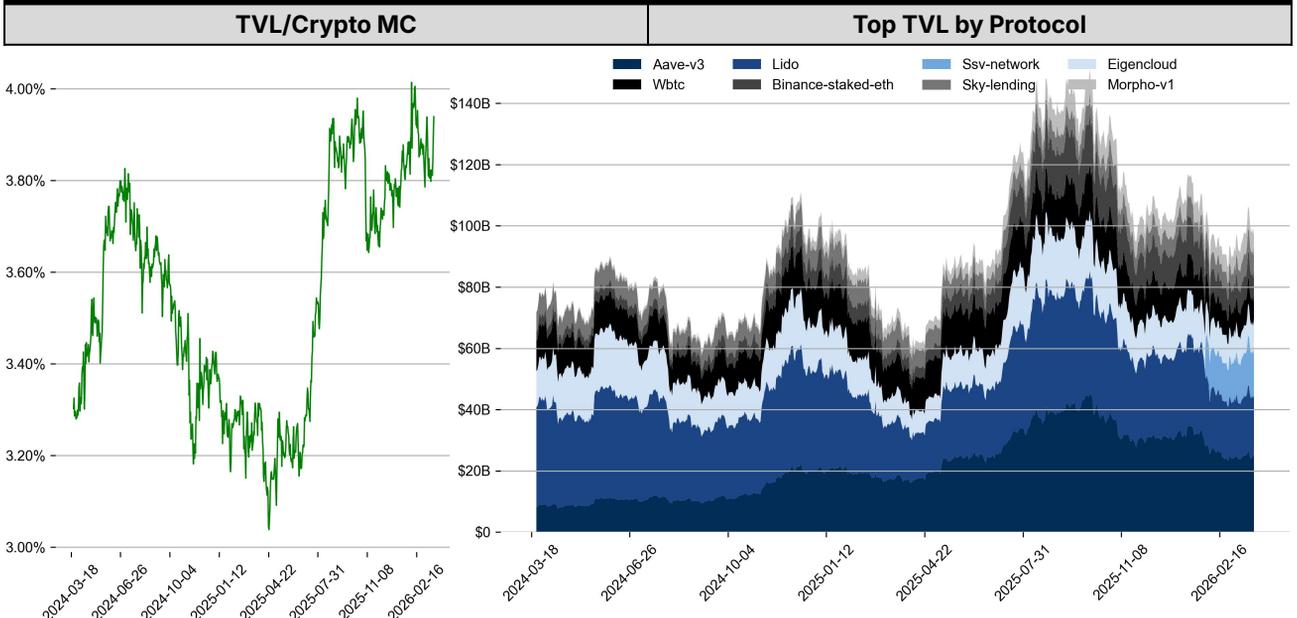
Correlation



STABLECOIN



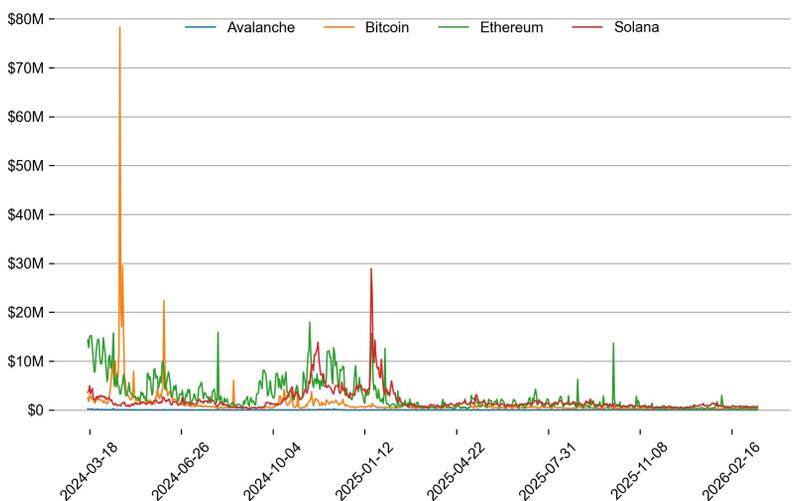
ONCHAIN MOVES



Top TVL Gainers*

#	Name	7D Change
1	WEEX	+1,154.3%
2	MatrixDock STBT	+31.8%
3	Hyperithm	+30.8%
4	Anemoy Capital	+26.2%
5	Echo Bridge	+23.4%

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
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), 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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