



**Daily Market Brief**  
**Apr 13, 2026 (UTC -02:00)**

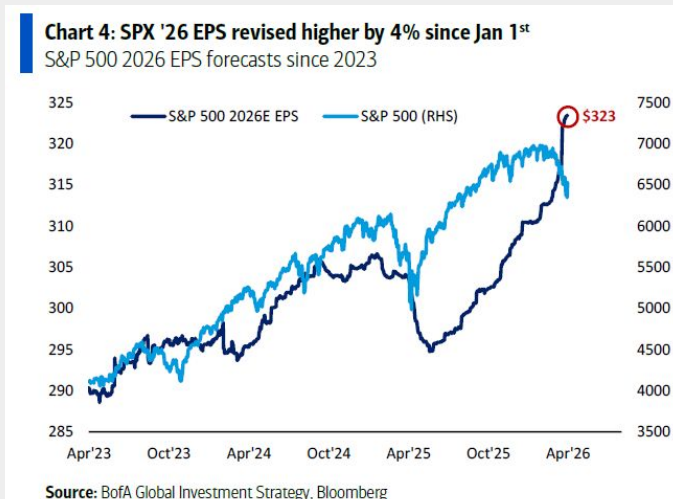
**Peter Chung** | Head of Research  
**Min Jung** | Research Associate

<b>BTC</b>	<b>\$70,744.16</b> -3.2%	<b>S&amp;P500</b>	<b>6,816.89</b> -0.1%	<b>US 10Y</b>	<b>4.3590%</b> +0.0420PPT	<b>WTI</b>	<b>\$104.73</b> +8.4%
<b>ETH</b>	<b>\$2,192.01</b> -4.1%	<b>Nasdaq</b>	<b>22,902.89</b> +0.4%	<b>DXY</b>	<b>99.10</b> +0.5%	<b>Gold</b>	<b>\$4,693.30</b> -2.0%

- \$BTC slides as the U.S. and Iran failed to reach an agreement. As of now \$BTC is trading at \$70,744 and \$ETH is trading at \$2,192. Bitcoin dominance stands at 59.35%.
- This week’s calendar includes U.S. PPI on Tuesday, U.S. crude oil inventories on Wednesday, and earnings from major financials (JPMorgan, BlackRock, Citi, Morgan Stanley) and TSMC throughout the week.
- A few headlines over the weekend include: Justin Sun and WLF1 engage in mutual attacks on X, Aave DAO approves a \$25 million funding grant to Aave Labs in a binding “Aave Will Win” vote, and the ECB backs an EU plan to centralize crypto supervision under the Paris-based ESMA watchdog.
- During the last 24 hours, the top three gainers were \$RAVE, \$ULTIMA, and \$SIREN, while the top three losers were \$DASH, \$EDGE, and \$FF.

**Iran Headlines May Matter Less Than You Think**

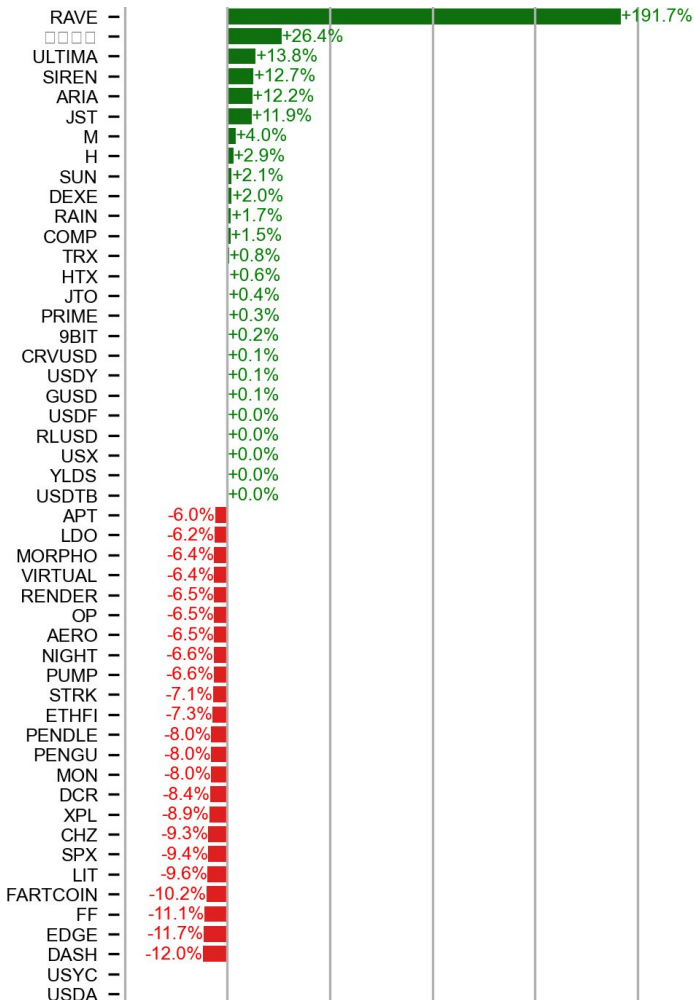
Our tendency to fall back on dominant headlines to explain market moves means that, in the current environment, we hang our entire market view on the outcomes of the Iranian conflict. While this approach may be justified for short-term knee-jerk reactions after the failed ceasefire talks over the weekend, other things matter more for the medium-term trend, according to Morgan Stanley’s Michael Wilson. He notes that the growth outlook has been improving, and this is why the correction in risk assets since October is “a classic bull market correction, not a bear market.” This also likely explains the resilient performance of risk assets since the conflict began (SPX -1%, Mag7 +2%, BTC +5%). Looking ahead, he believes geopolitical risk is largely priced in, and “what remains is largely about rates and policy,” which will be resolved with the Fed leadership change next month. He advises: “The market trades in advance of the headlines. Investors should do the same.”



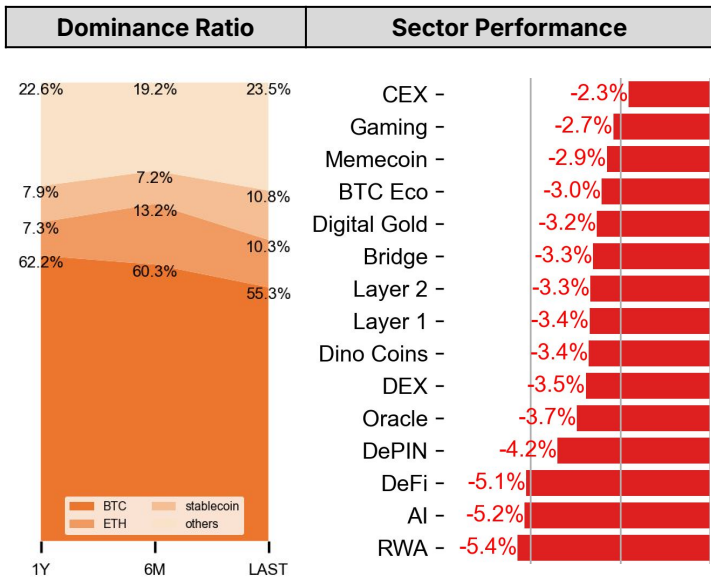
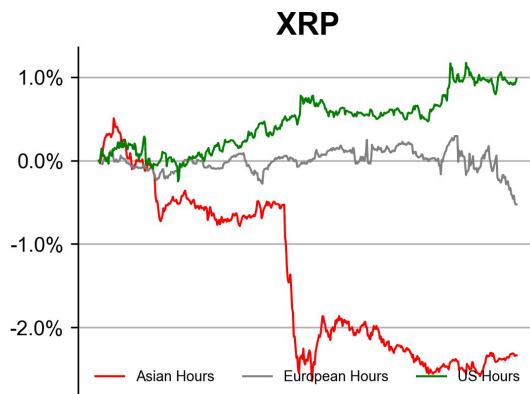
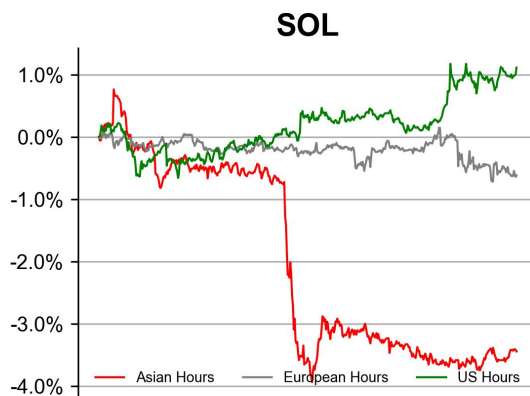
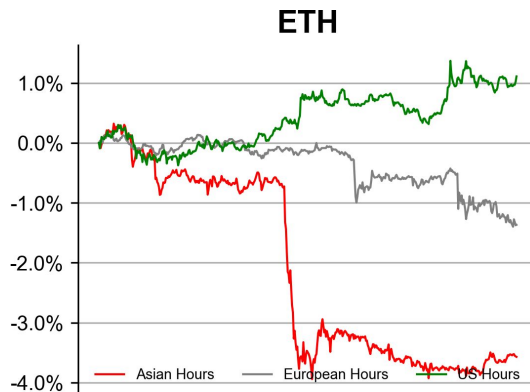
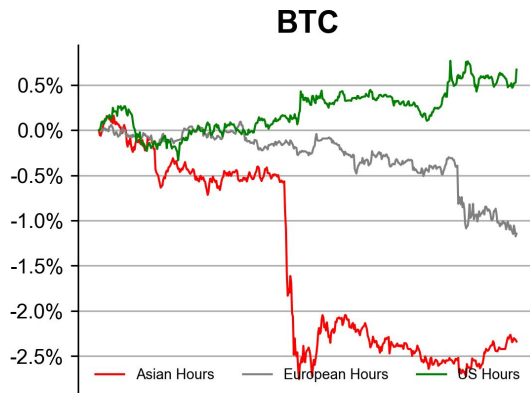
Source: ZeroHedge

# PRICE ACTIONS

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

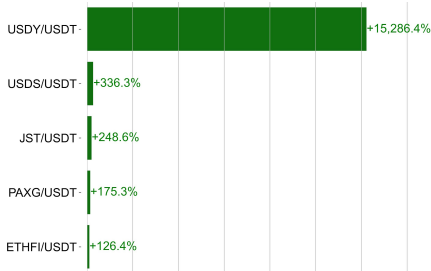


## Time Zone Analysis

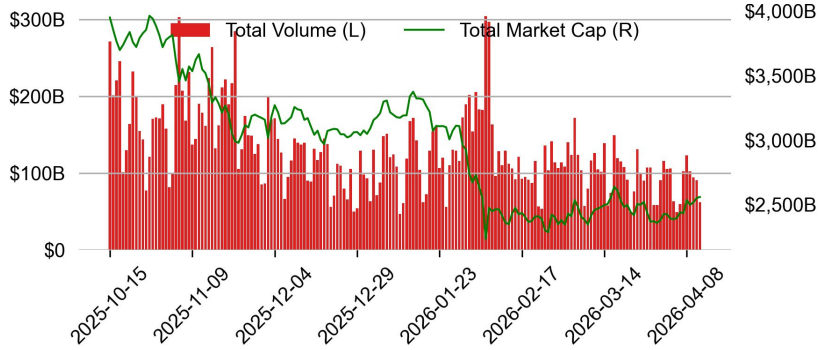


# TRADING VOLUME

## 24H Vol % Chg\*

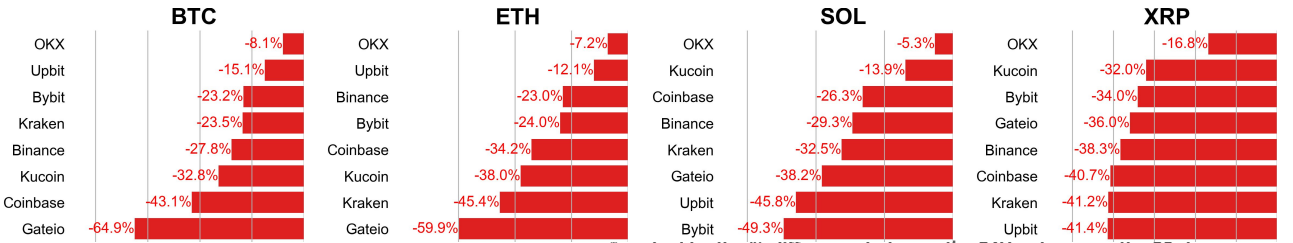


## Spot Volume



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

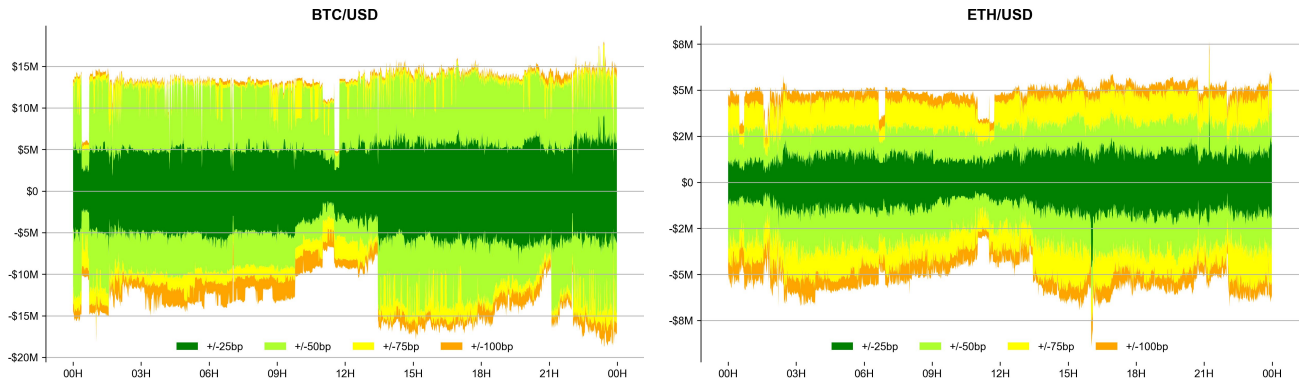
## Spot Volume Leaders (% chg vs ave)\*



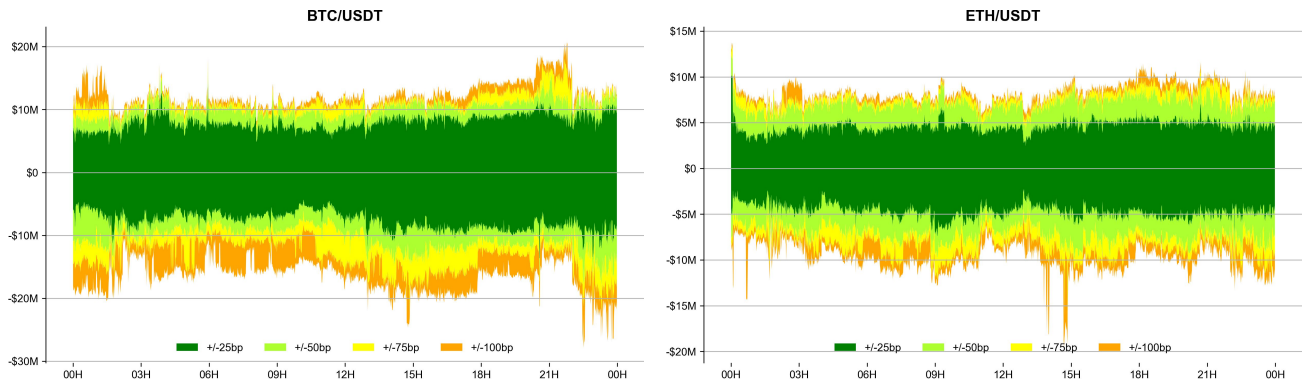
\* ranked by the % difference between the 24H volume vs. the 30-day average

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

### Coinbase

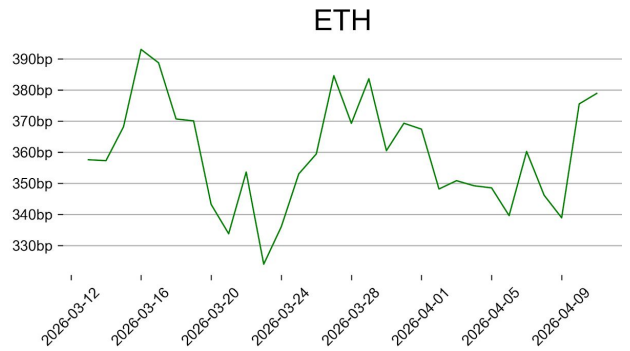
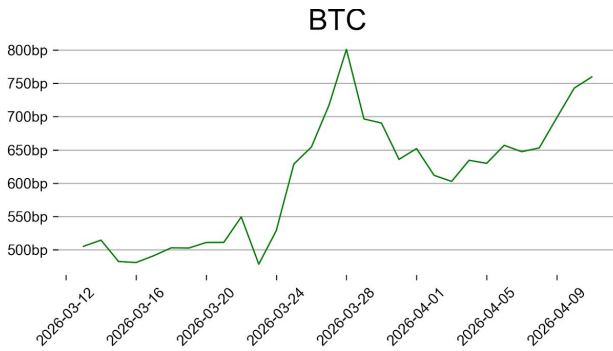


### Binance

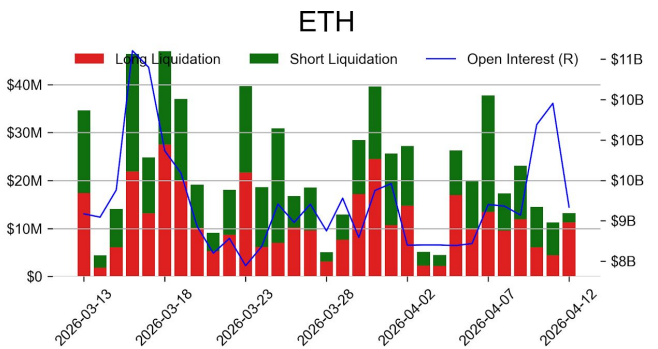
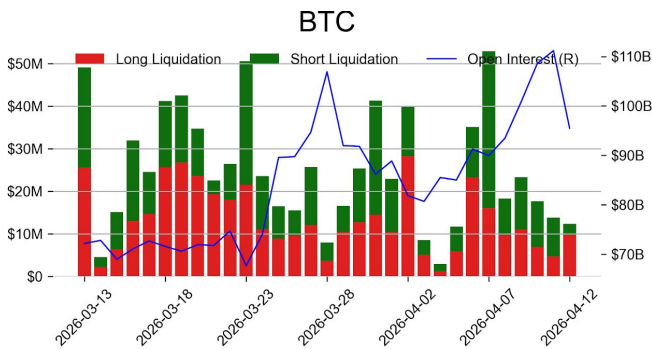


## DERIVATIVES

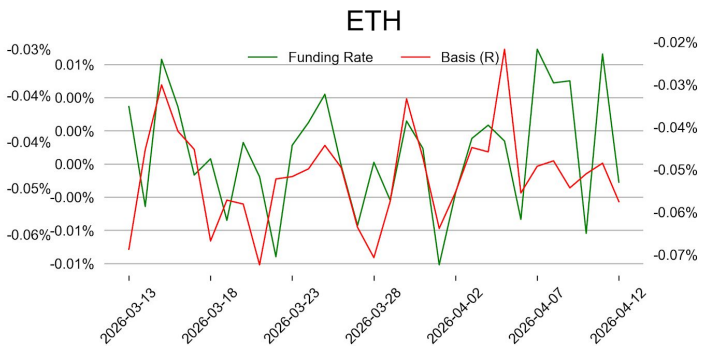
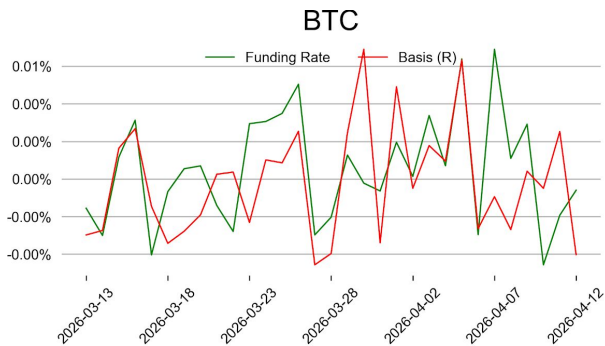
### Open Interest / Market Cap



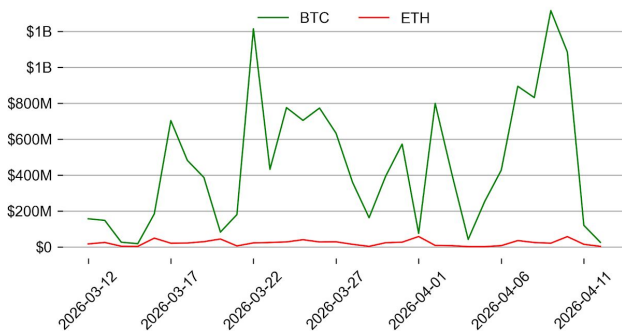
### Futures O.I. & Liquidations



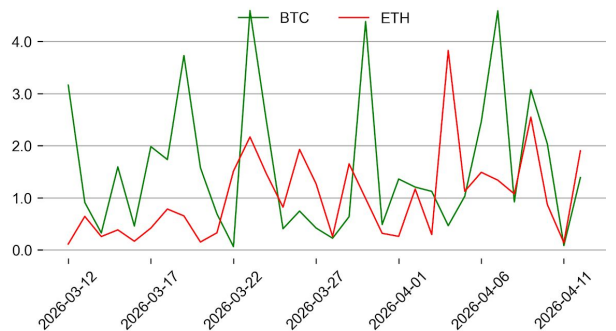
### Perps Funding Rate & Rolling Basis



### Option Volume



### Put Call Ratio



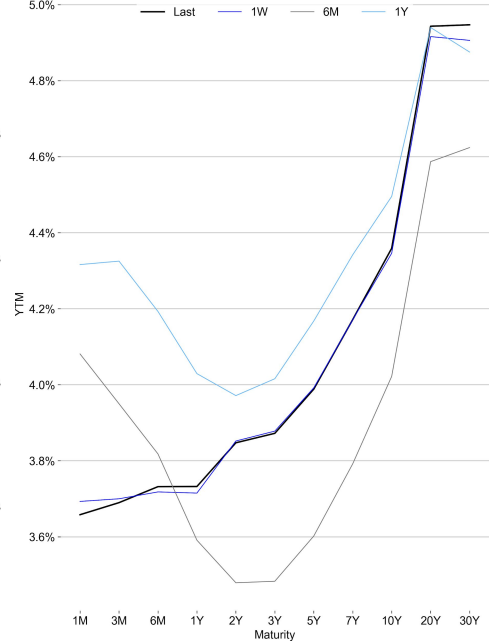
# TRADFI

	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	6816.89	22902.89	5926.11	25893.54	4636.57	0.8565	159.68	6.8280	99.10	104.73	4693.30	167.85	128.64	9.54	16.60
1D	-0.1%	0.4%	0.5%	0.5%	1.5%	0.4%	0.2%	-0.1%	0.5%	8.4%	-2.0%	-0.7%	-0.2%	-1.3%	-0.5%
1M	0.6%	0.8%	2.3%	-0.0%	-1.4%	-2.2%	-0.0%	-0.6%	-1.3%	8.1%	-7.3%	-15.5%	-7.0%	11.6%	12.1%
1Y	29.4%	39.8%	23.0%	25.2%	24.1%	-2.7%	11.3%	-6.6%	-1.0%	70.3%	44.6%	-1.0%	-52.8%	-18.7%	144.5%

## BTC Spot ETF Flow

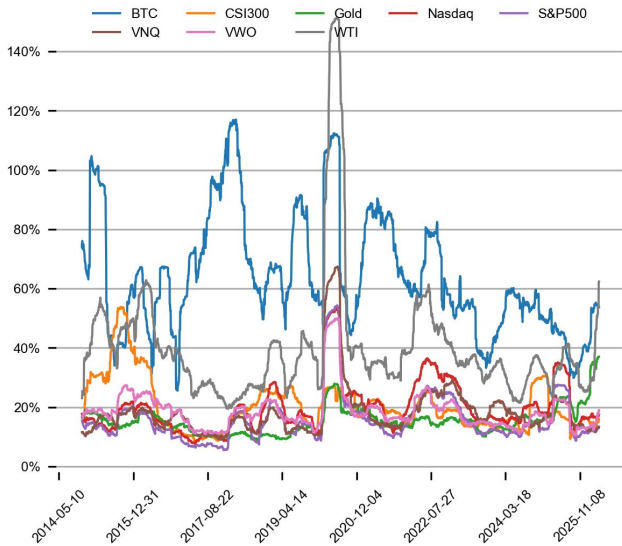


## US Treasury Yield Curve

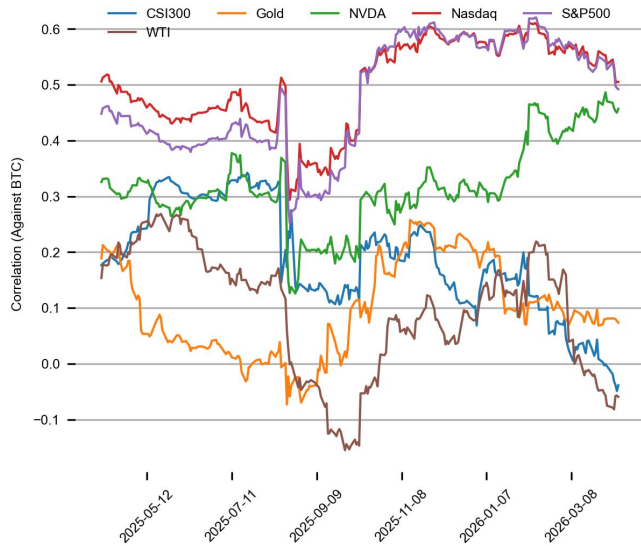


## CROSS ASSET METRICS

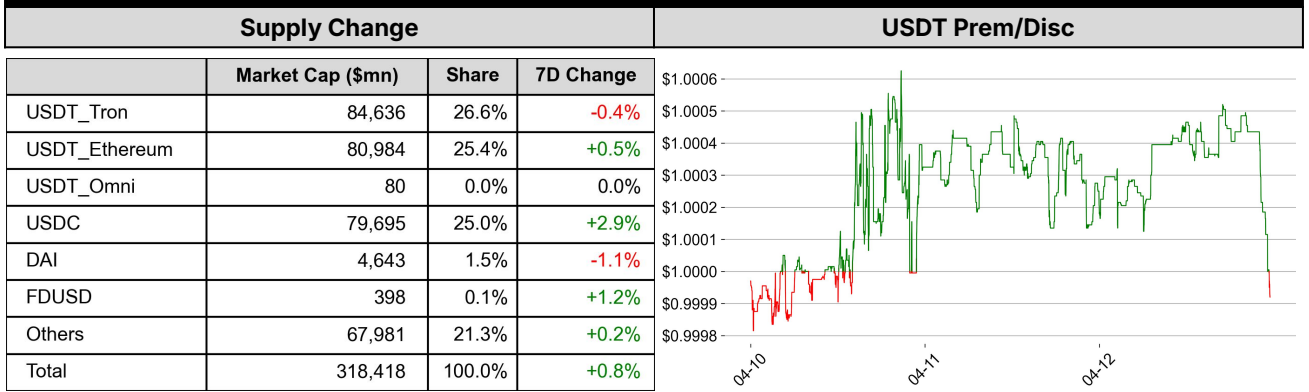
### Volatility



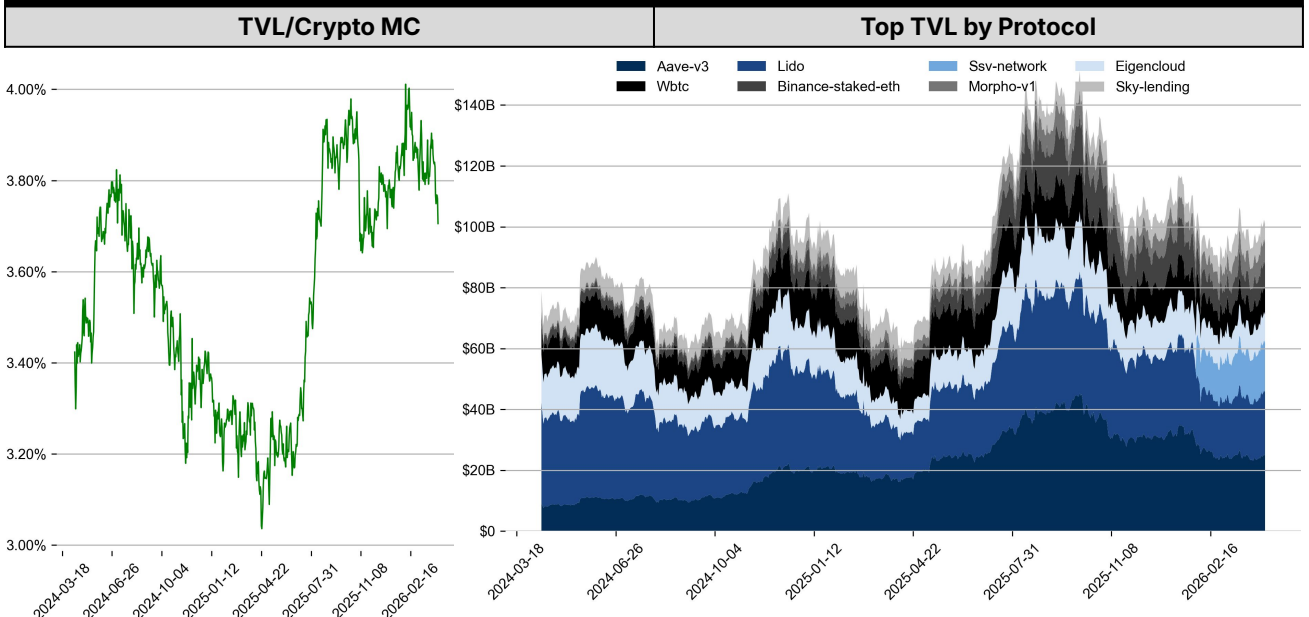
### Correlation



## STABLECOIN



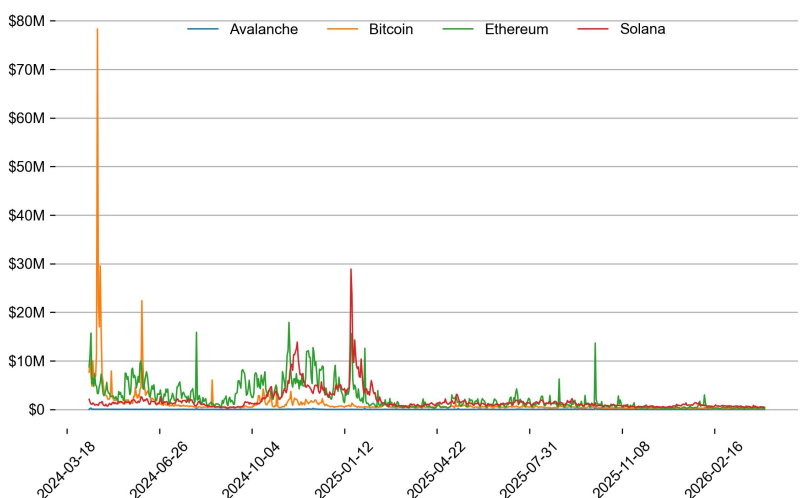
## ONCHAIN MOVES



### Top TVL Gainers\*

#	Name	7D Change
1	Polygon zkEVM Bridge	+58.8%
2	Strata Markets	+34.2%
3	Reservoir Protocol	+31.0%
4	Echo Bridge	+27.2%
5	Liquid Collective	+24.1%

### 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>
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
<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

Presto is an algorithmic trading firm where researchers and engineers solve challenging problems in global financial markets. Our core strength lies in combining engineering, mathematics, and science to navigate both digital asset and traditional finance markets with precision. Presto Research, our research unit, provides expert-driven insights to help navigate these markets effectively.

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