



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

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<b>BTC</b>	\$70,494.08 +0.4%	<b>S&amp;P500</b>	6,672.58 -1.5%	<b>US 10Y</b>	4.2600% +0.0540PPT	<b>WTI</b>	\$96.59 +10.7%
<b>ETH</b>	\$2,073.08 +1.0%	<b>Nasdaq</b>	22,311.98 -1.8%	<b>DXY</b>	99.67 +0.4%	<b>Gold</b>	\$5,101.24 -1.5%

- \$BTC continues to trade rangebound. As of now, \$BTC is trading at \$70,494 and \$ETH is trading at \$2,073. Bitcoin dominance stands at 59.39%.
- CFTC Chair said the agency plans to begin rulemaking to clarify how prediction markets can be listed and traded under U.S. derivatives rules. The move aims to reinforce CFTC oversight as disputes continue over whether those fall under federal derivatives law or state gambling rules.
- A few other headlines include: Trump’s team will host a “gala luncheon” for token holders on April 25, ARK Invest and Unchained released a white paper estimating that about 34.6% of Bitcoin supply remains exposed to potential quantum computing risks, and JPMorgan noted a sharp flow divergence between Bitcoin and gold ETFs since the Iran war.
- During the last 24 hours, the top three gainers were \$RIVER, \$PI, and \$FET, while the top three losers were \$CVX \$KITE, and \$DCR.

**HSBC & StanChart Tipped for HK’s First Stablecoin Licenses, Outpacing US**

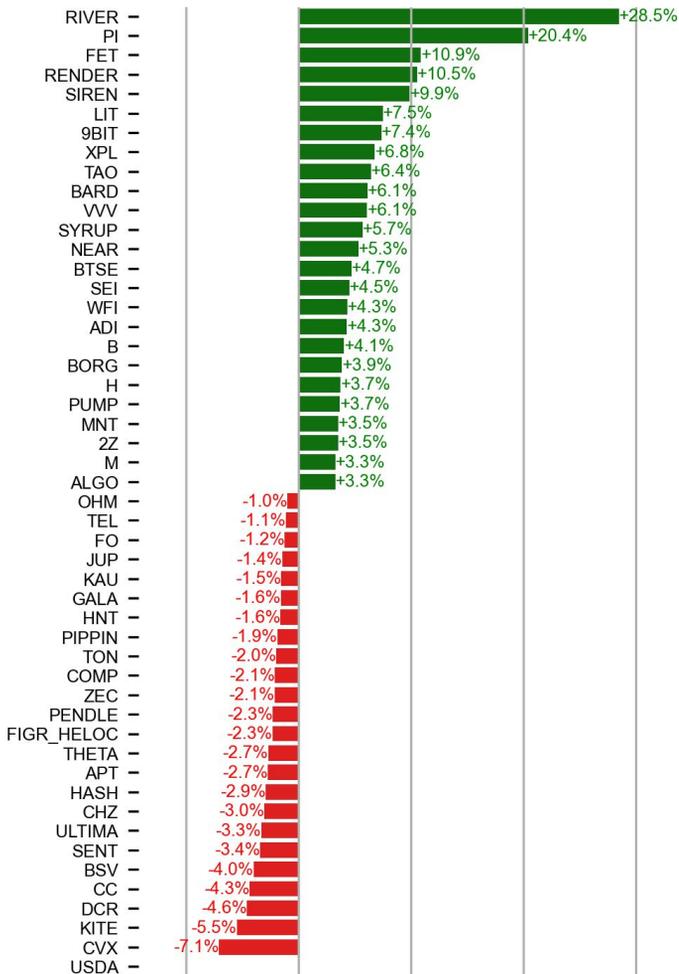
Hong Kong media reported yesterday that HSBC and a joint venture led by Standard Chartered are likely to be among the first recipients of the city’s stablecoin licences. The Hong Kong Monetary Authority (HKMA), the de facto central bank overseeing the process, is expected to announce the first batch of recipients from the 36 applicants on March 24. The surprise is HSBC; this appears to be the first time the world’s seventh-largest bank has been publicly linked to blockchain-related activities. Hong Kong’s long history as a trading and financial hub has underscored the value of efficient settlement infrastructure. This same priority led it to adopt a USD-pegged currency board regime some 40 years ago. The HKD functions essentially as a fiat version of a USD stablecoin, backed by USD reserves at a fixed rate of 7.8:1. Hong Kong’s unique currency regime heritage, combined with its swift implementation of the Stablecoin Ordinance, may enable the city to outpace the US in mainstream adoption of blockchain’s #1 application, stablecoins.



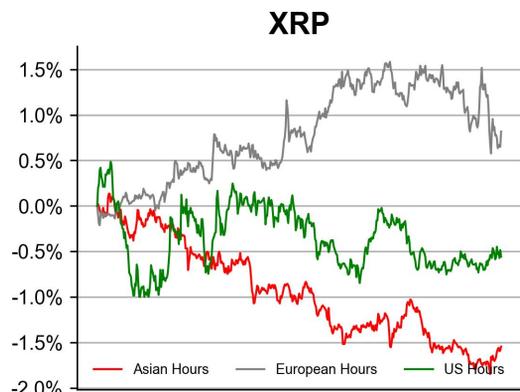
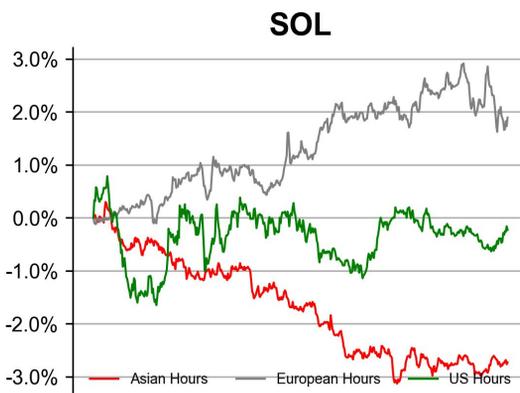
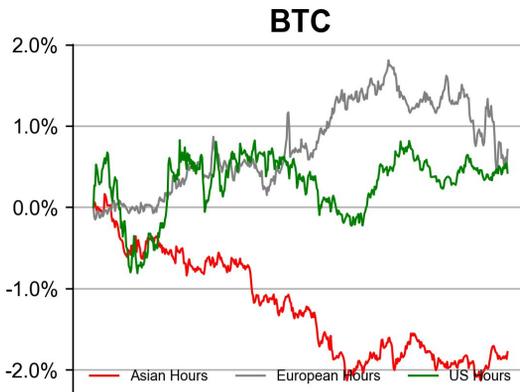
Source: Coinspeaker

# PRICE ACTIONS

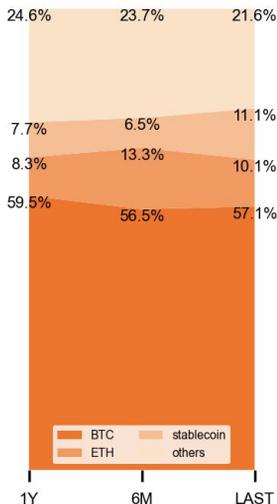
## 24H Price Change (Top/Bottom 25 from Top 200)



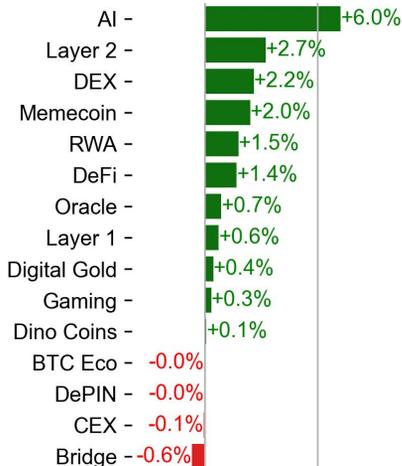
## Time Zone Analysis



## Dominance Ratio

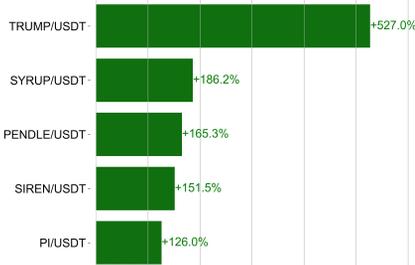


## Sector Performance

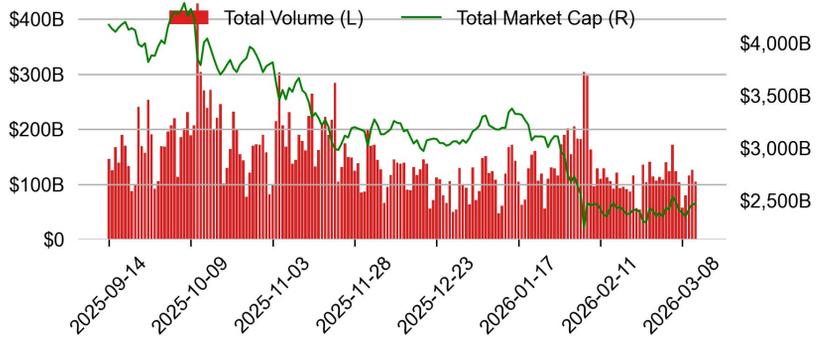


# TRADING VOLUME

## 24H Vol % Chg\*

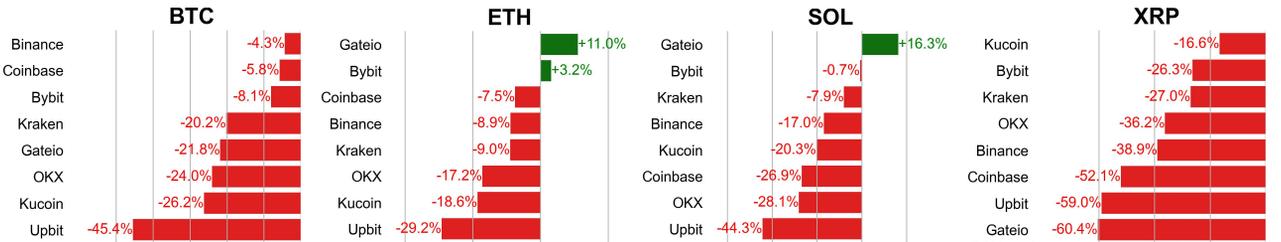


## Spot Volume



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

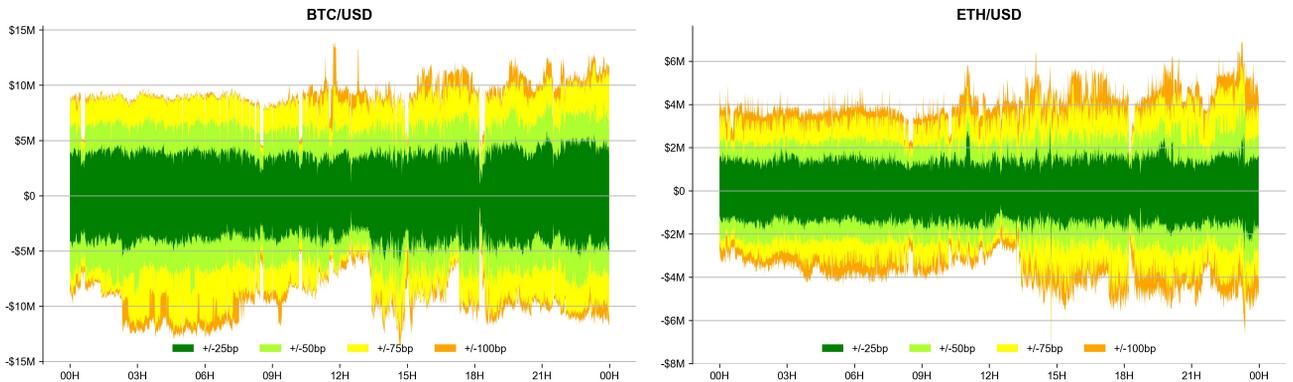
## Spot Volume Leaders (% chg vs ave)\*



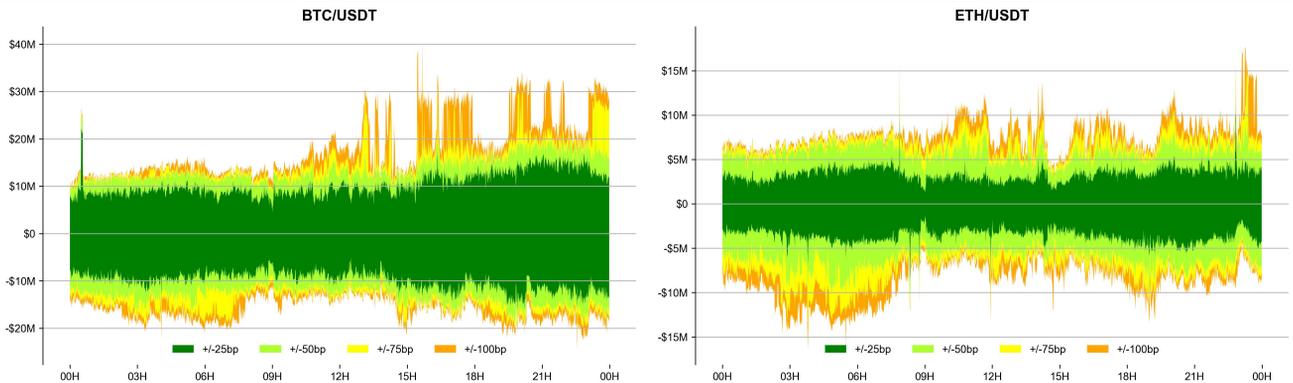
\* ranked by the % difference between the 24H volume vs. the 30-day average

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

### Coinbase

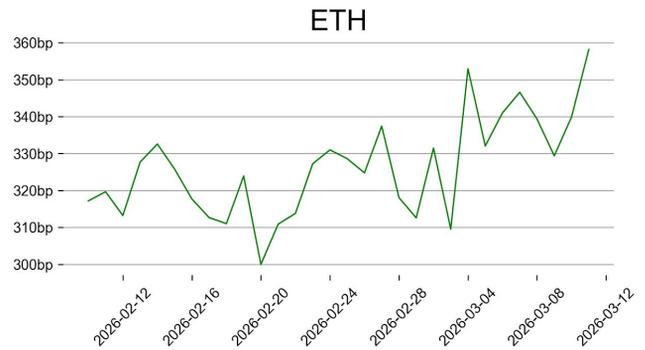
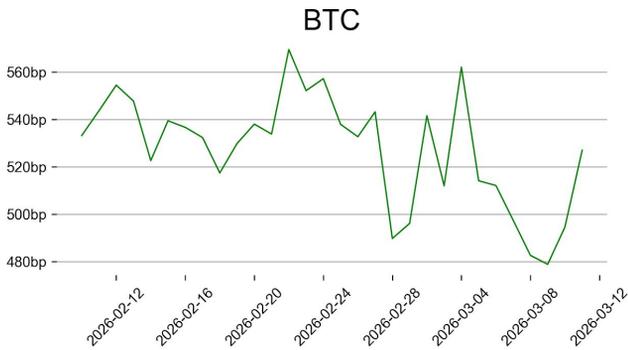


### Binance

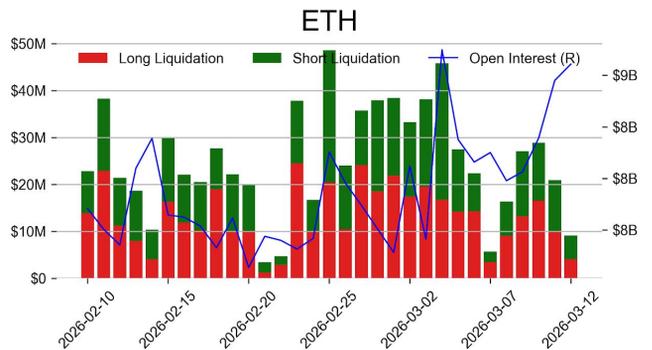
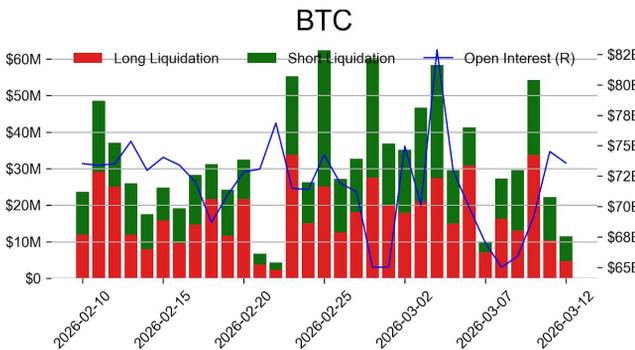


## DERIVATIVES

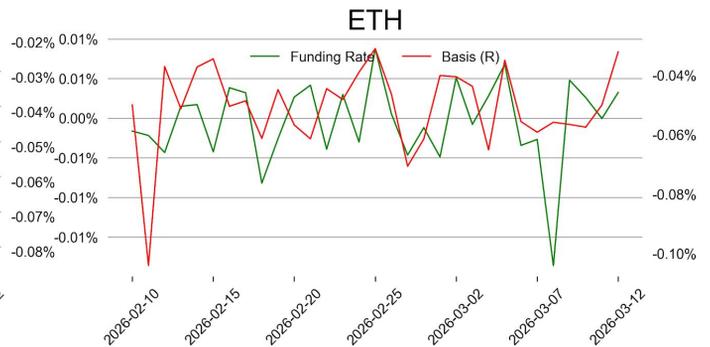
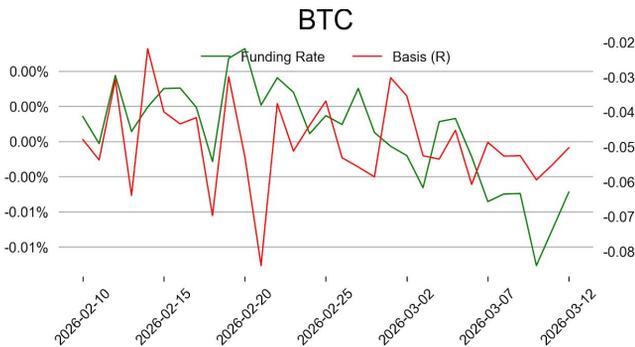
### Open Interest / Market Cap



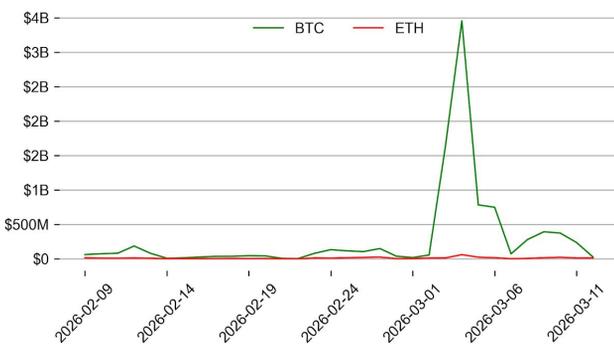
### Futures O.I. & Liquidations



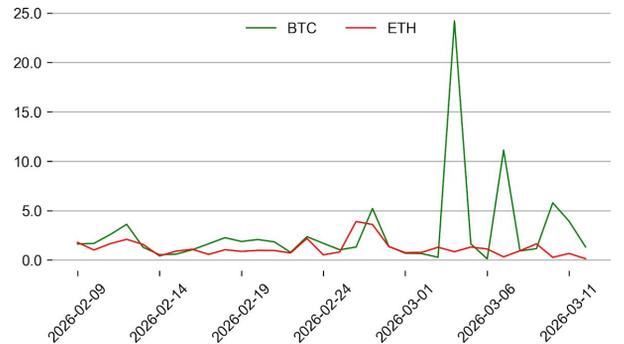
### Perps Funding Rate & Rolling Basis



### Option Volume



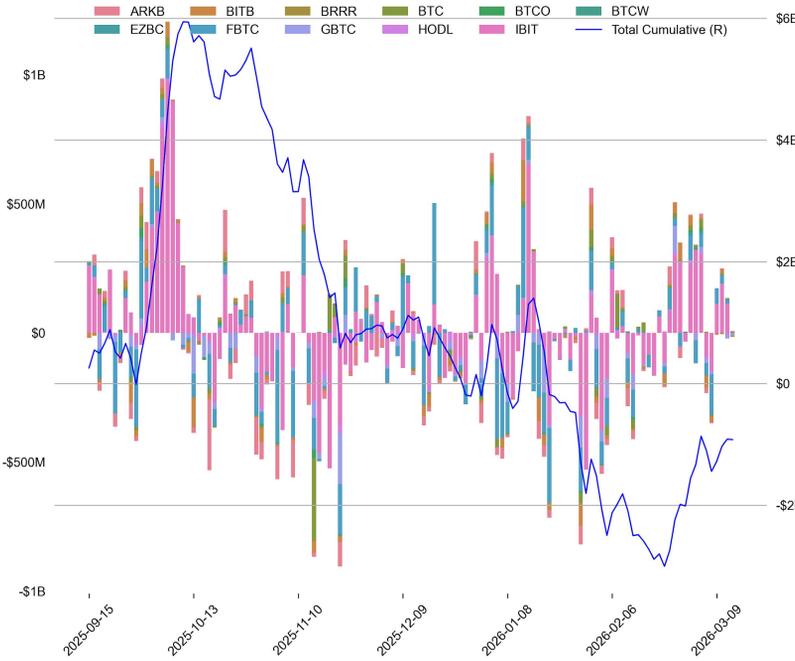
### Put Call Ratio



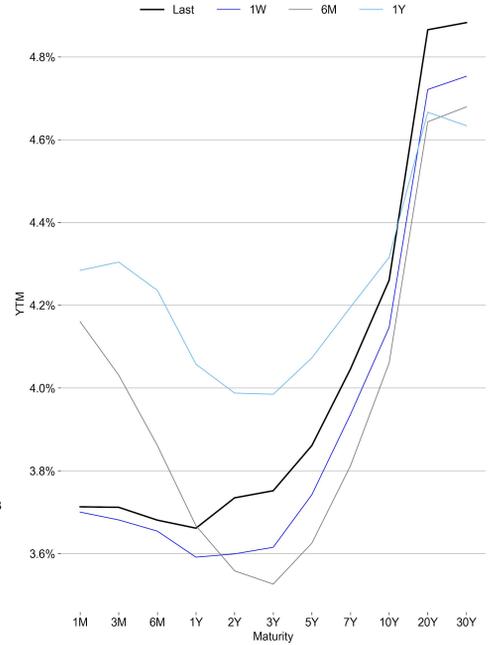
# TRADFI

	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	6672.58	22311.98	5754.65	25716.76	4687.56	0.8679	159.24	6.8690	99.67	96.59	5101.24	193.23	137.34	8.76	14.50
1D	-1.5%	-1.8%	-0.7%	-0.7%	-0.4%	0.4%	0.2%	0.0%	0.4%	10.7%	-1.5%	-2.7%	-0.7%	2.5%	-2.1%
1M	-3.9%	-3.4%	-4.8%	-5.4%	-0.8%	3.2%	3.1%	-0.6%	3.0%	51.4%	1.4%	18.9%	3.3%	14.4%	-2.2%
1Y	19.2%	26.4%	7.4%	9.0%	19.4%	-5.5%	7.4%	-5.1%	-3.8%	43.4%	73.1%	0.8%	-47.7%	-33.2%	84.7%

## BTC Spot ETF Flow

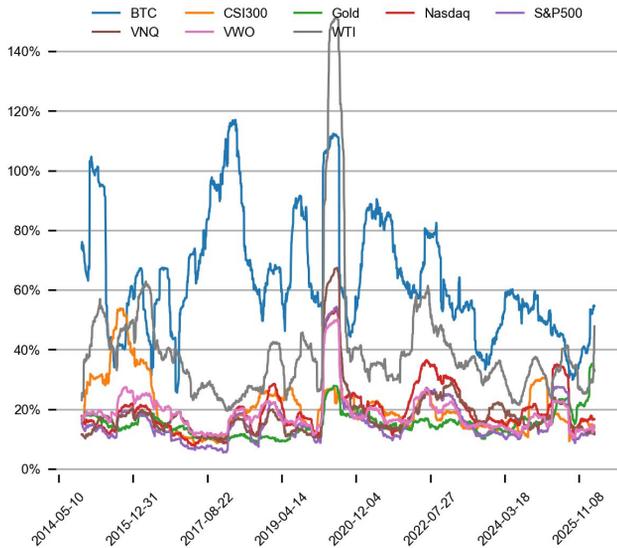


## US Treasury Yield Curve

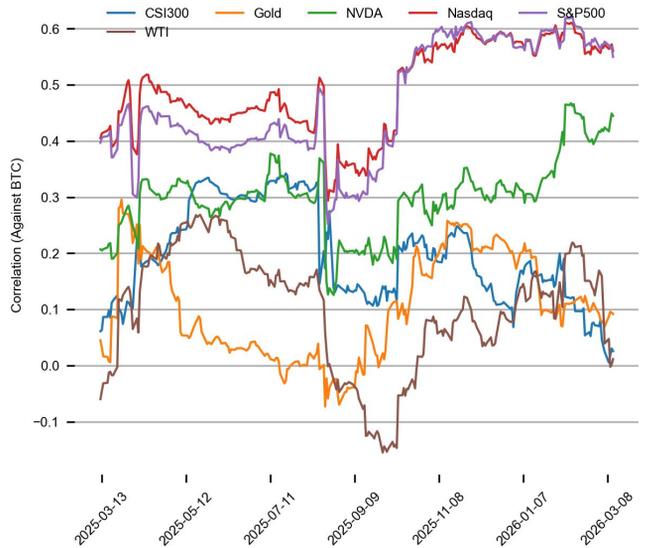


## CROSS ASSET METRICS

### Volatility



### Correlation



## STABLECOIN

Supply Change				USDT Prem/Disc
	Market Cap (\$mn)	Share	7D Change	
USDT_Trone	85,391	27.2%	+0.7%	
USDT_Ethereum	78,408	24.9%	-0.6%	
USDT_Omni	80	0.0%	0.0%	
USDC	78,835	25.1%	+2.3%	
DAI	4,529	1.4%	+0.7%	
FDUSD	375	0.1%	+1.5%	
Others	66,713	21.2%	+3.0%	
Total	314,331	100.0%	+1.3%	

## ONCHAIN MOVES

TVL/Crypto MC	Top TVL by Protocol
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Top TVL Gainers*	Daily Network Fees
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\* 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

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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