



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

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BTC	\$75,771.57 -0.8%	S&P500	7,136.13 -0.0%	US 10Y	4.4290% +0.0750PPT	WTI	\$107.98 +8.1%
ETH	\$2,252.84 -1.6%	Nasdaq	24,673.24 +0.0%	DXY	98.86 +0.2%	Gold	\$4,573.74 -0.8%

- \$BTC is down since U.S. hours. As of now, \$BTC is trading at \$75,771 and \$ETH is trading at \$2,252. Bitcoin dominance stands at 60.39%.
- The Fed kept rates unchanged at 3.50%–3.75% in what was likely Jerome Powell’s final meeting as chair, with four dissenters marking the most divided vote since 1992 and highlighting growing disagreement over the path of future rate cuts. Powell also said he will remain on the Fed board after his chair term ends, as Kevin Warsh moves closer to confirmation.
- A few other headlines include: the world’s largest stock transfer agent is moving into tokenization through a partnership with Securitize, MegaETH’s MEGA token will go live on April 30, and SWEAT Protocol thwarted a multi-million dollar exploit and restored user balances.
- During the last 24 hours, the top three gainers were \$SKYAI, \$UB, and \$LUNC, while the top three losers were \$UMXM, \$WLF1, and \$GENIUS.

Powell’s Last FOMC Reveals Fractured Fed for Warsh

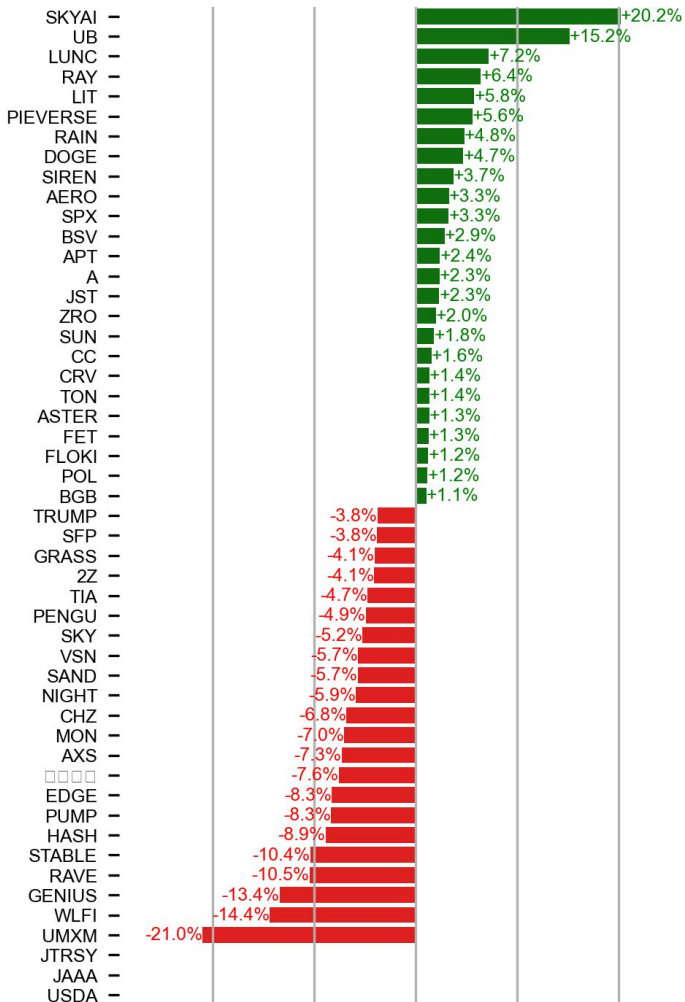
Among all the developments that have defied widely held expectations, the most significant is probably the sharp reversal in Fed rate-cut expectations this year. The 100 bps of cuts priced into CME futures six months ago have not only disappeared but, after last night’s FOMC meeting, now include a small probability of a rate hike. In an environment of resilient growth and geopolitically driven supply-chain disruptions, the once-popular narrative of a dovish new Fed Chair unleashing liquidity never had a leg to stand on throughout this year, not even on the day of Powell’s final FOMC briefing. That said, incoming Chair Kevin Warsh will inherit one of the most divided FOMCs in 34 years, judging by the number of dissents last night. This means his views could tilt policy more than usual, a reality the market seemingly has yet to reconcile with.



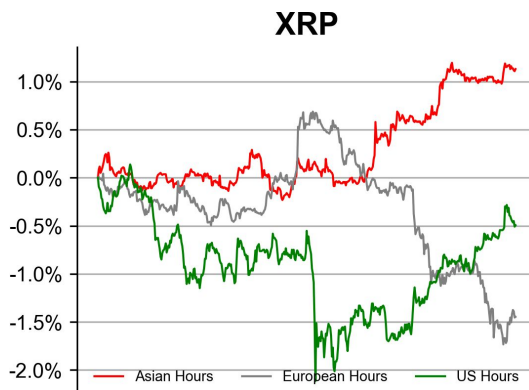
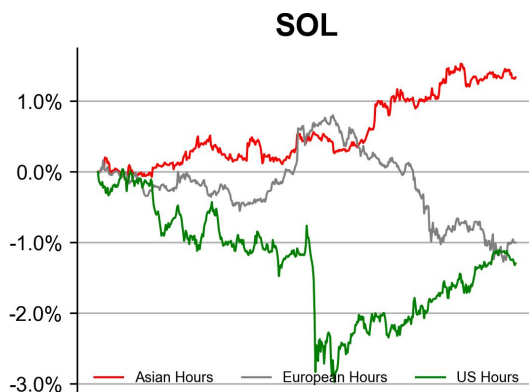
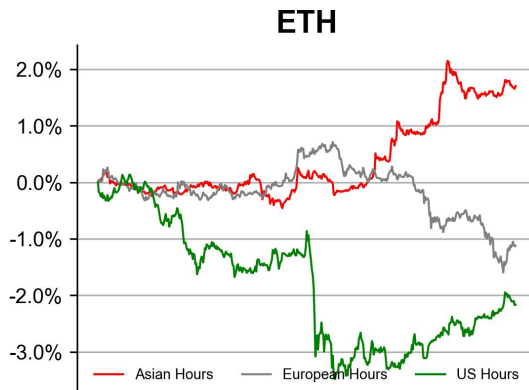
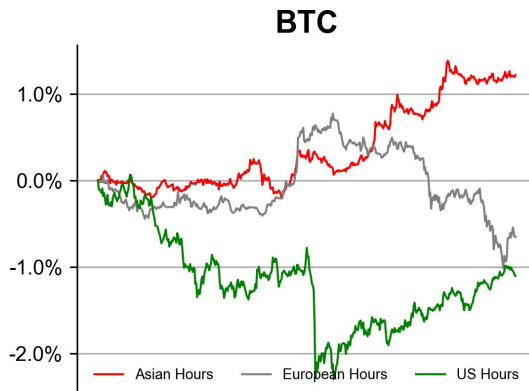
Source: Bloomberg

PRICE ACTIONS

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

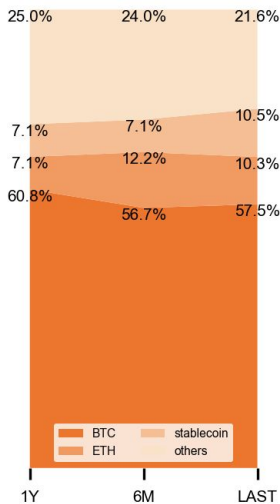


Time Zone Analysis



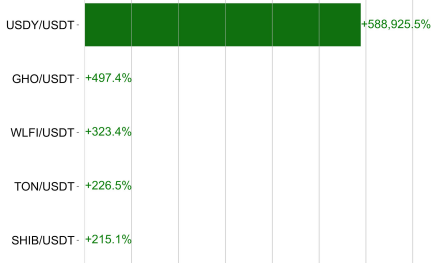
Dominance Ratio

Sector Performance

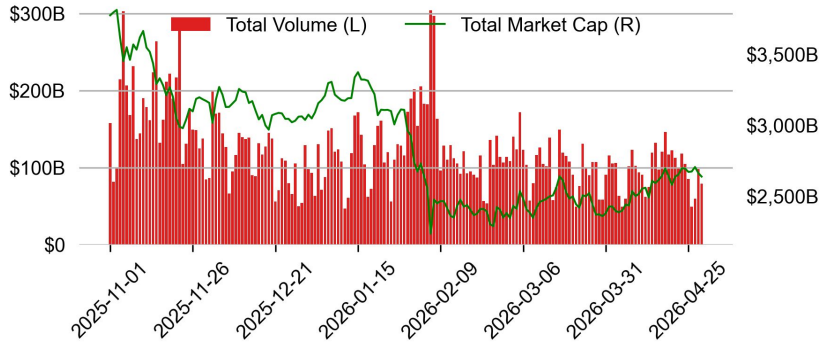


TRADING VOLUME

24H Vol % Chg*

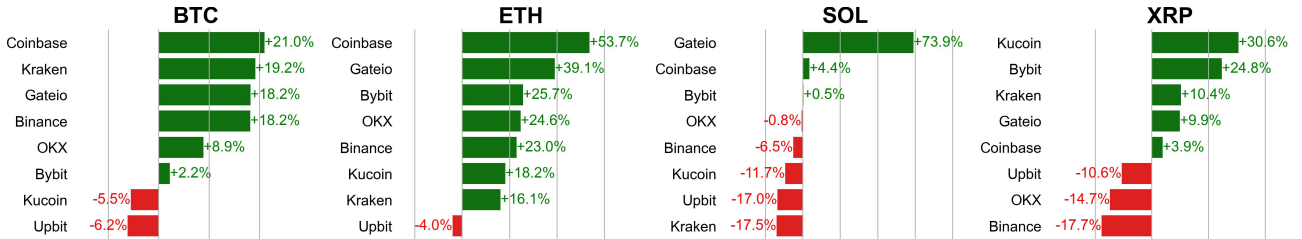


Spot Volume



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

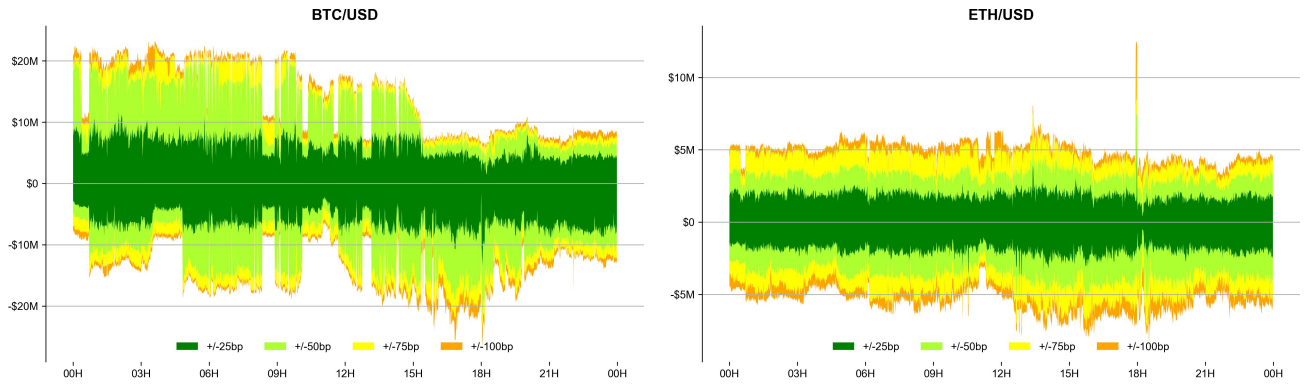
Spot Volume Leaders (% chg vs ave)*



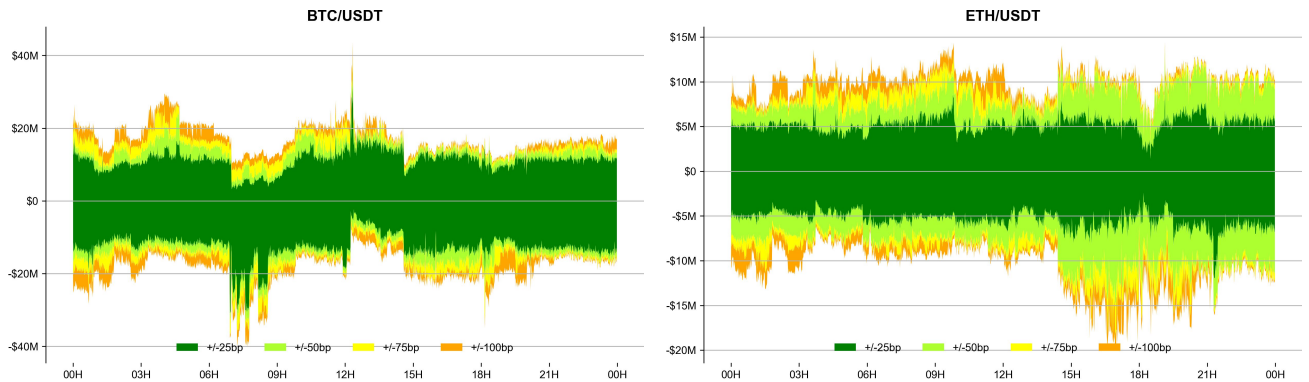
* ranked by the % difference between the 24H volume vs. the 30-day average

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

Coinbase

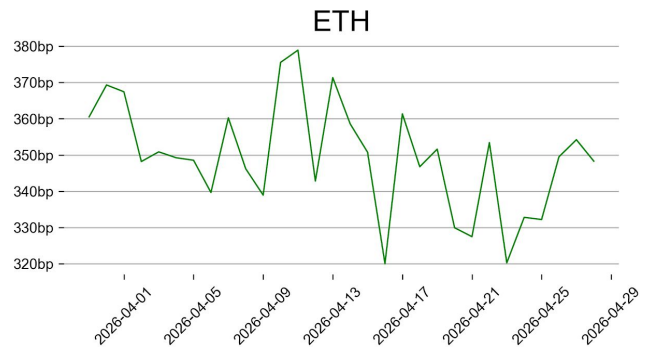
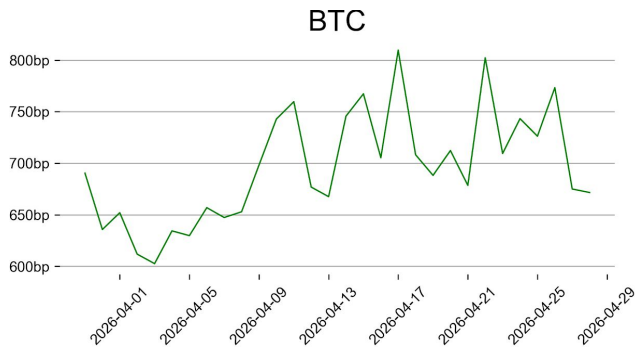


Binance

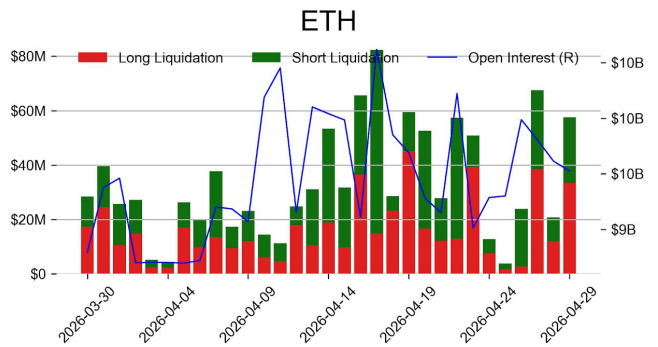
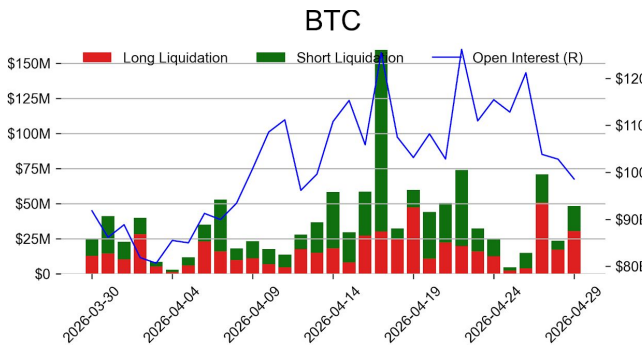


DERIVATIVES

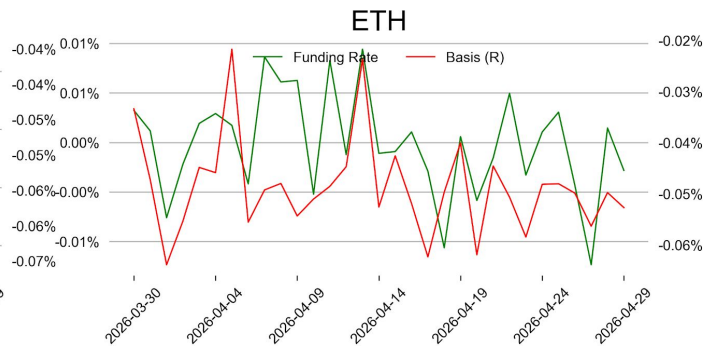
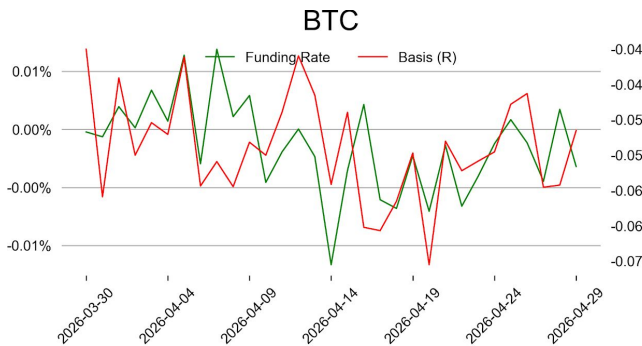
Open Interest / Market Cap



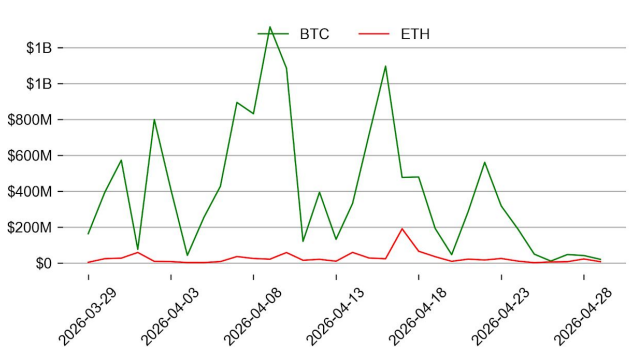
Futures O.I. & Liquidations



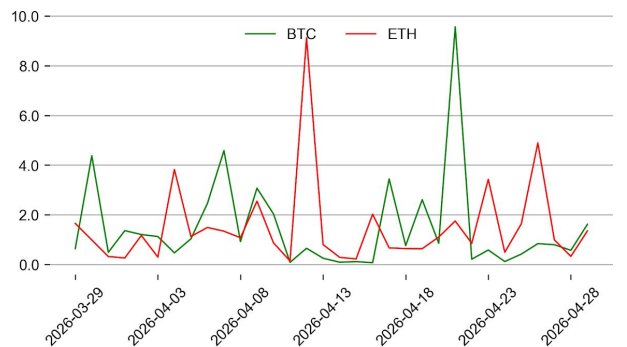
Perps Funding Rate & Rolling Basis



Option Volume



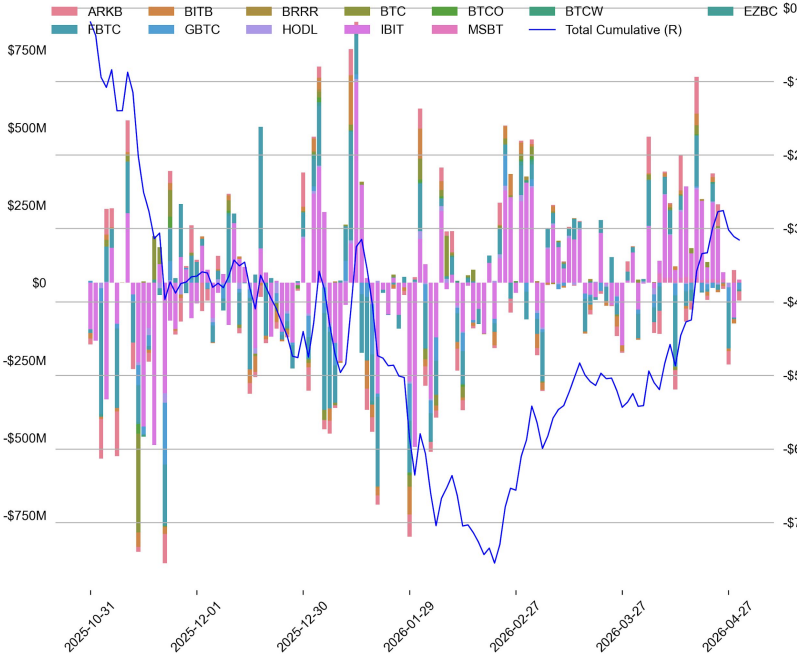
Put Call Ratio



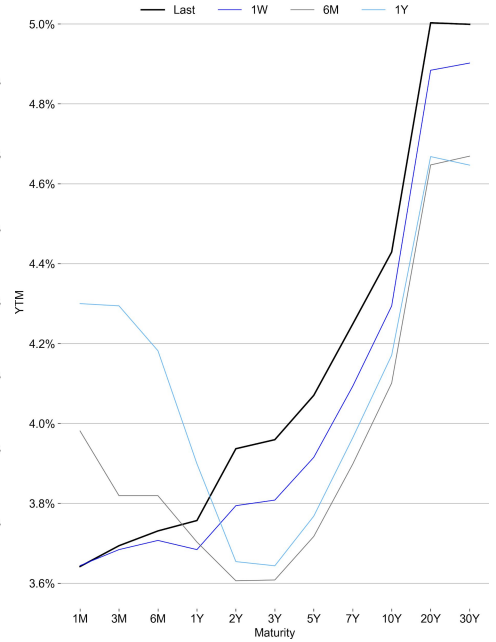
TRADFI

	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	7136.13	24673.24	5811.86	26111.84	4810.35	0.8564	160.20	6.8383	98.86	107.98	4573.74	181.73	158.19	10.72	15.99
1D	-0.0%	0.0%	-0.4%	1.7%	1.1%	0.3%	0.4%	0.0%	0.2%	8.1%	-0.8%	-6.4%	-4.5%	-2.7%	-3.5%
1M	12.5%	18.7%	4.9%	5.5%	7.1%	-1.8%	0.3%	-1.1%	-1.6%	5.0%	0.4%	13.0%	30.3%	37.5%	35.2%
1Y	28.3%	41.3%	12.6%	18.6%	27.4%	-2.5%	12.5%	-5.9%	-0.4%	78.7%	37.2%	-11.8%	-58.5%	-24.6%	115.5%

BTC Spot ETF Flow

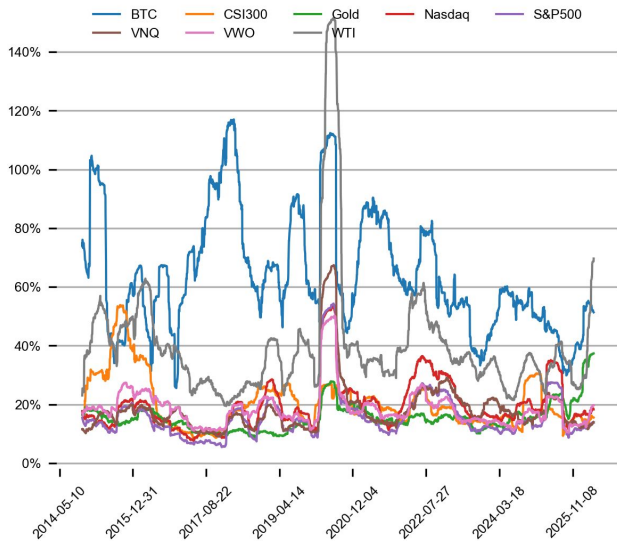


US Treasury Yield Curve

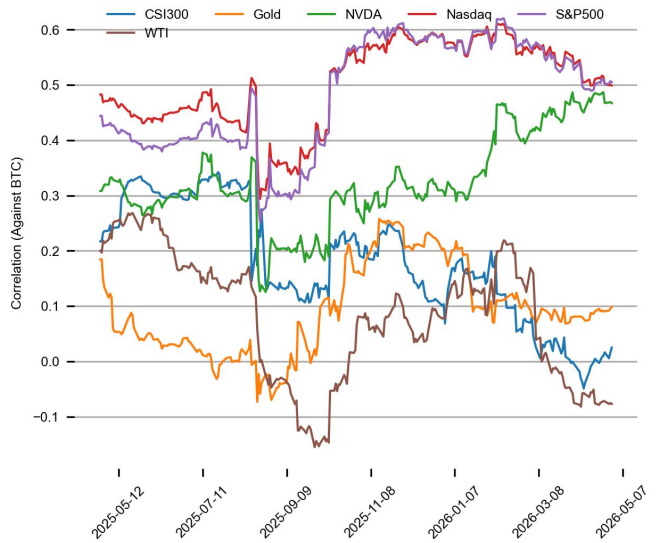


CROSS ASSET METRICS

Volatility



Correlation



STABLECOIN

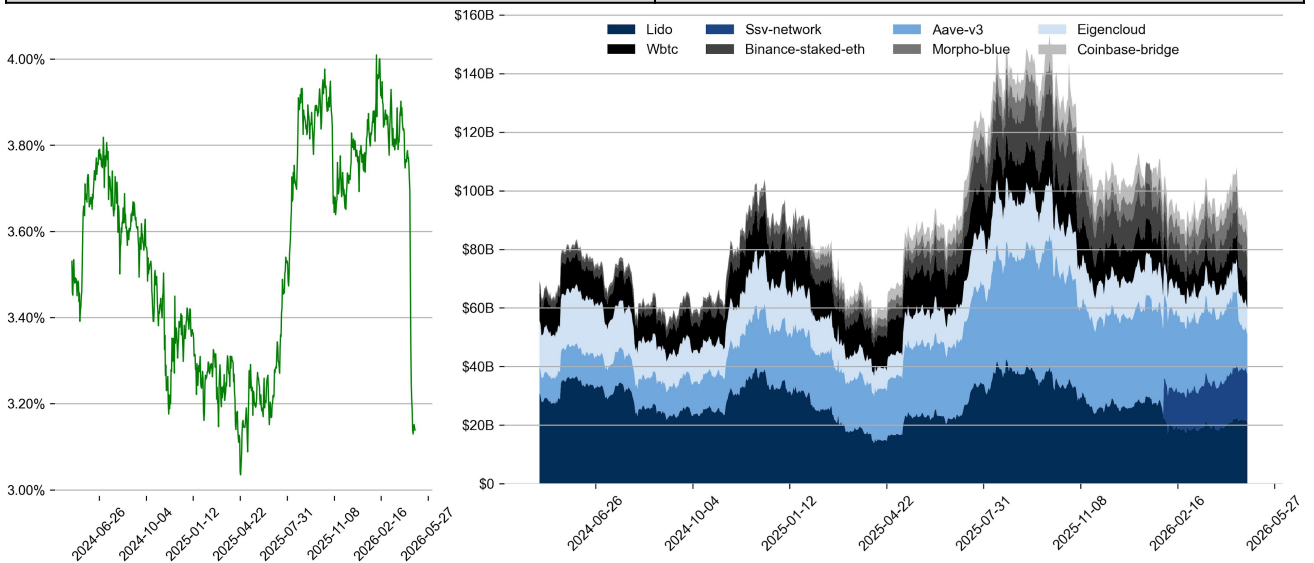
Supply Change

USDT Prem/Disc

ONCHAIN MOVES

TVL/Crypto MC

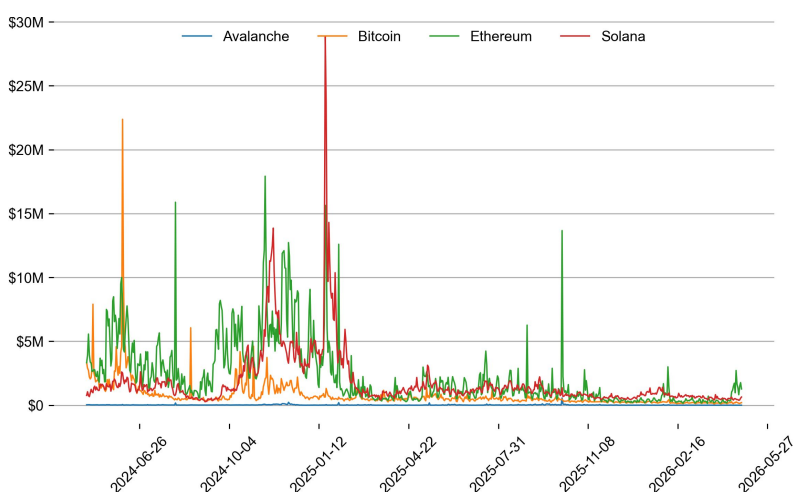
Top TVL by Protocol



Top TVL Gainers*

Daily Network Fees

#	Name	7D Change
1	KPK	+244.0%
2	crvUSD	+86.1%
3	Gauntlet	+58.1%
4	Free Protocol	+33.2%
5	Blockchain Capital	+27.8%



* 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
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
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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