

Daily Market Brief

Sep 5, 2025 (UTC -02:00)

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BTC	\$110,712.73 -0.9%	S&P500	6,502.08 +0.8%	US 10Y	4.1530% -0.0580PPT	WTI	\$63.31 -1.0%
ETH	\$4,297.66 -3.4%	Nasdaq	21,707.69 +1.0%	DXY	98.24 +0.1%	Gold	\$3,609.60 -0.7%

- \$BTC trades above \$110K without significant movement. As of now, \$BTC is trading at \$110,712 and \$ETH is trading at \$4,297, with Bitcoin dominance at 58.73%.
- Consensus expects the August NFP to show a modest gain of around +75,000 jobs and a slight uptick in unemployment to 4.3%, reinforcing market bets on a Fed rate cut at the September 17 FOMC. Key focus points will be wage growth, labor-force participation, and any downward revisions to prior months, which could signal deeper labor market cooling.
- A few other headlines include: World Liberty blacklists Justin Sun's wallet after he moved \$9 million in WLFI tokens, Kraken acquires Breakout, and Mega Matrix (NYSE: MPU) files a \$2B shelf to fund its stablecoin governance token strategy.
- During the last 24 hours, the top three gainers were [\\$M](#), [\\$PUMP](#), and [\\$FORM](#), while the top three losers were [\\$WLFI](#), [\\$ENA](#), and [\\$PYTH](#).

WLFI Blacklists Justin Sun, Freezes \$107MM Wallet

World Liberty Financial (\$WLFI), which was down 24% at one point on Thursday, surged 8% after blacklisting a wallet linked to Justin Sun, freezing 595 million WLFI (~\$107MM), about 15% of the token's circulating supply. The freeze followed a \$9MM outbound transfer from the address, which had received 3B \$WLFI from treasury. Sun, who invested \$30MM in WLFI and held an advisory role, claimed the movement was a "generic deposit test." The protocol responded by permanently disabling transfers from the address.

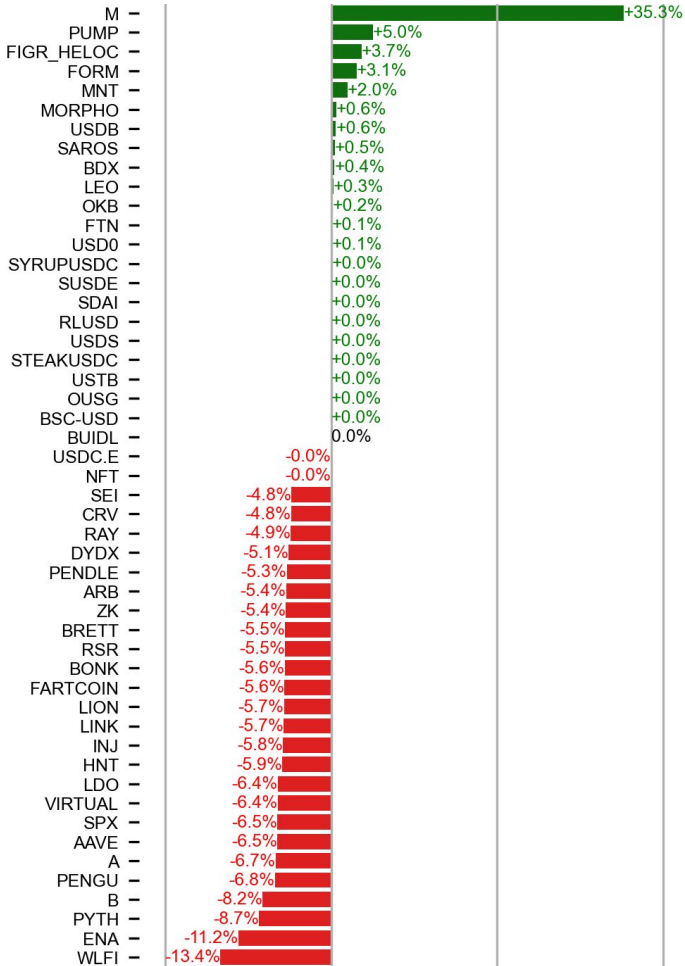
The decision marked a public break from Sun, whose growing presence had sparked concerns as \$WLFI deepened its Tron integration. Traders welcomed the move: \$WLFI dipped below a \$400MM market cap before bouncing back to \$425MM, with combined volumes on Binance and Uniswap topping \$50MM. With the address frozen and Sun sidelined, WLFI reaffirmed its narrative as a protocol unwilling to cede control to whales.



Source: CoinGecko

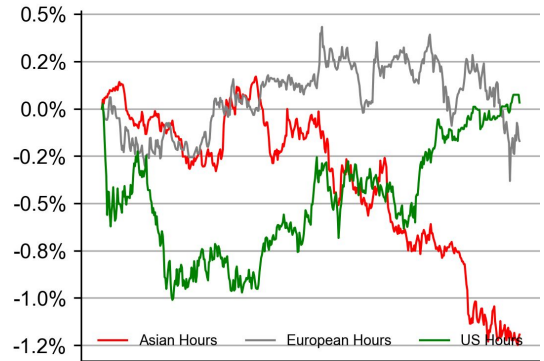
PRICE ACTIONS

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

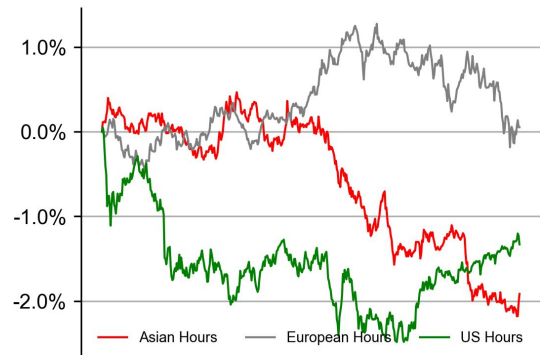


Time Zone Analysis

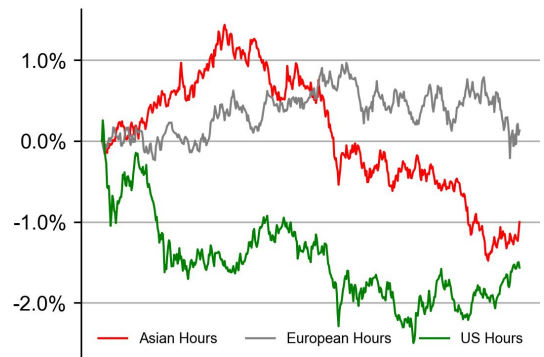
BTC



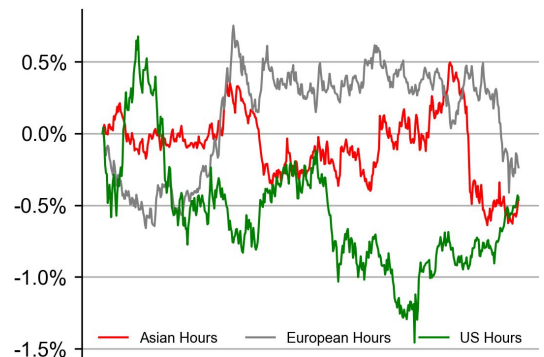
ETH



SOL

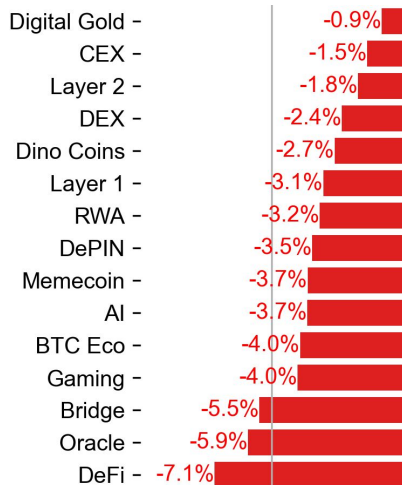
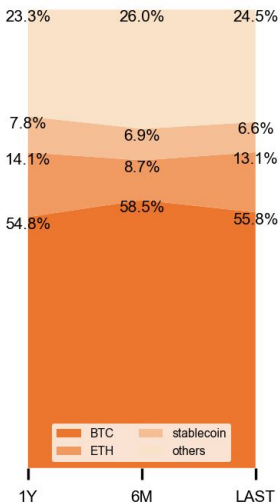


XRP



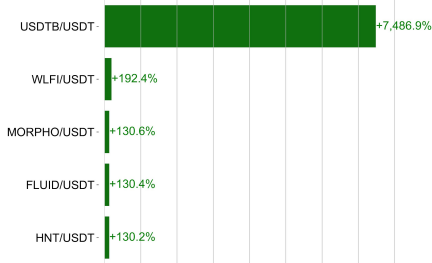
Dominance Ratio

Sector Performance



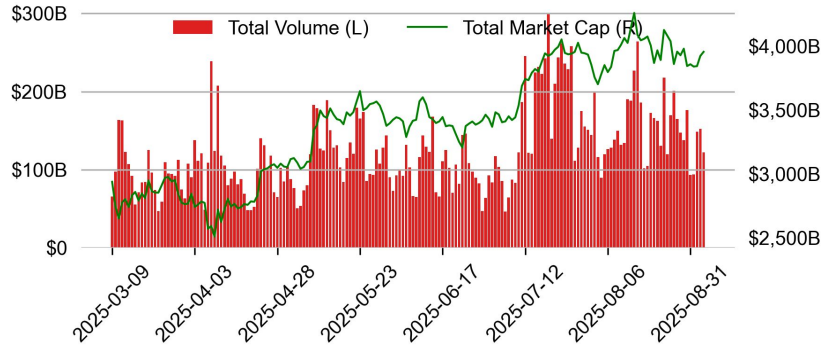
TRADING VOLUME

24H Vol % Chg*

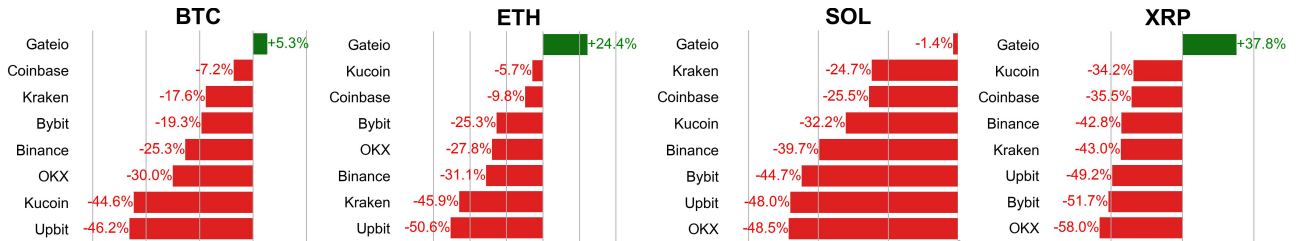


* 5 largest 24H vol. change from the universe of top 50 assets by market cap

Spot Volume



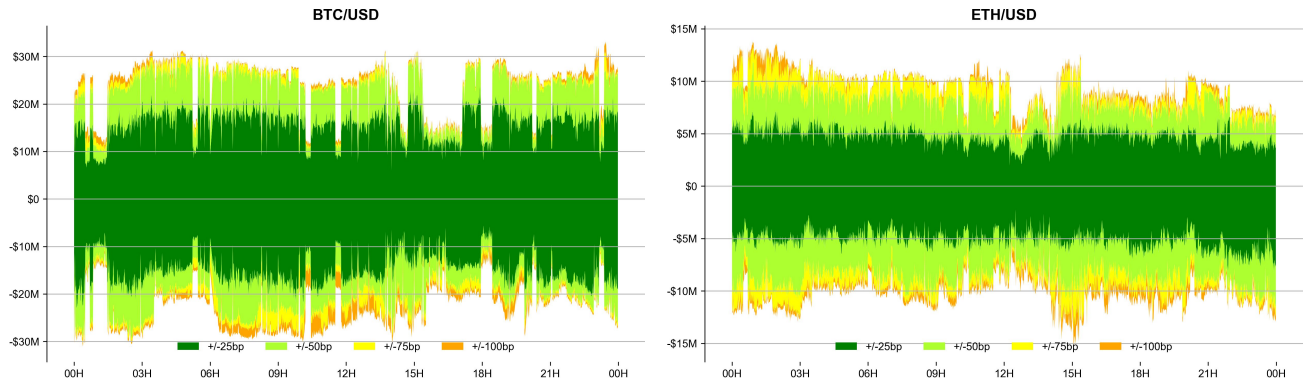
Spot Volume Leaders (% chg vs ave)*



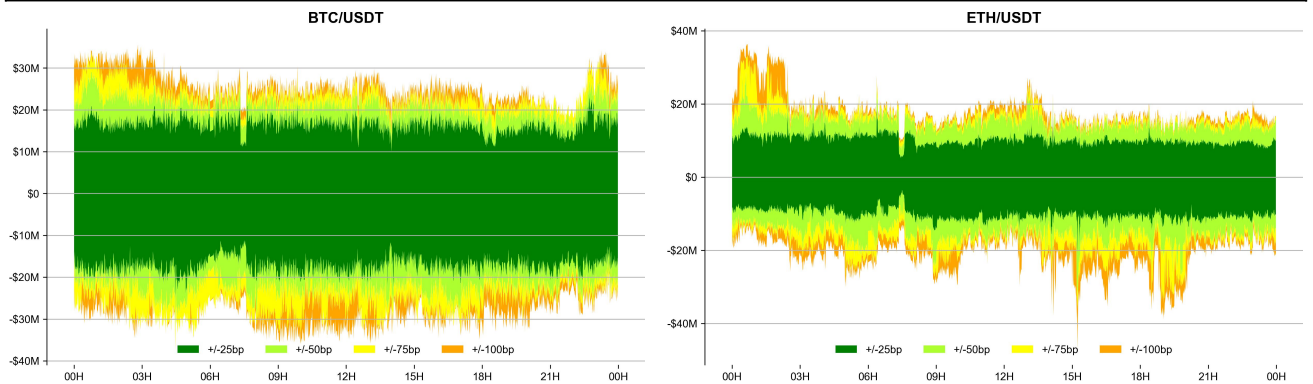
* ranked by the % difference between the 24H volume vs. the 30-day average

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

Coinbase

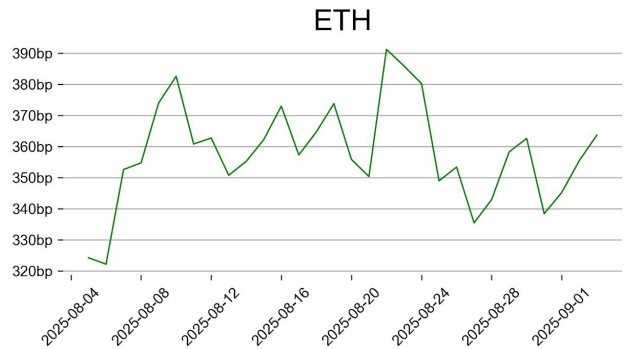
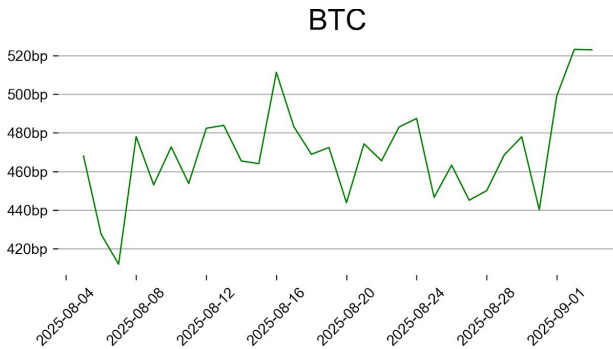


Binance

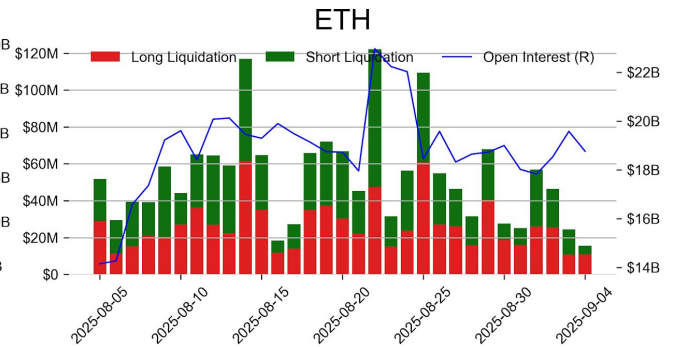
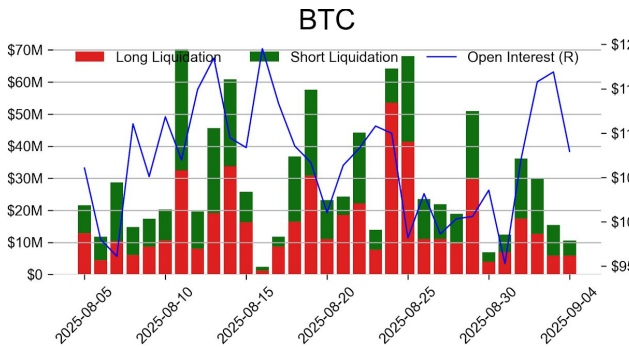


DERIVATIVES

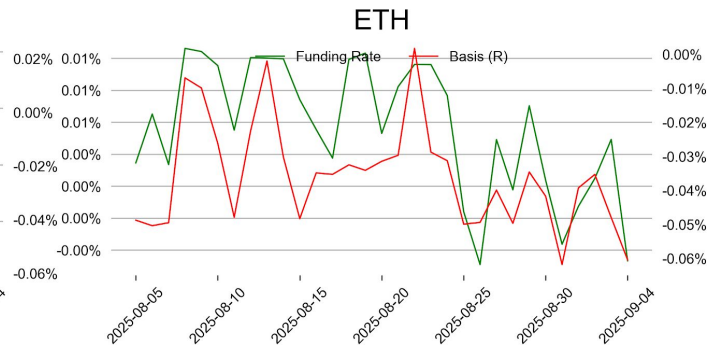
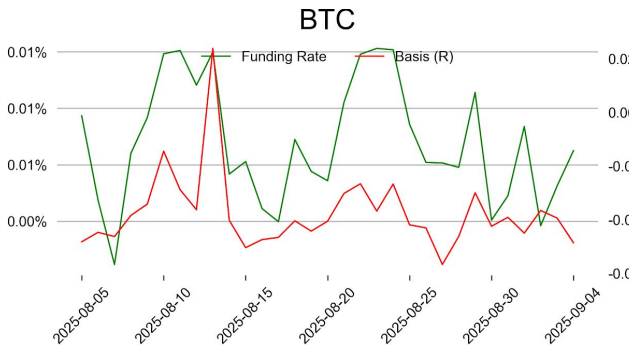
Open Interest / Market Cap



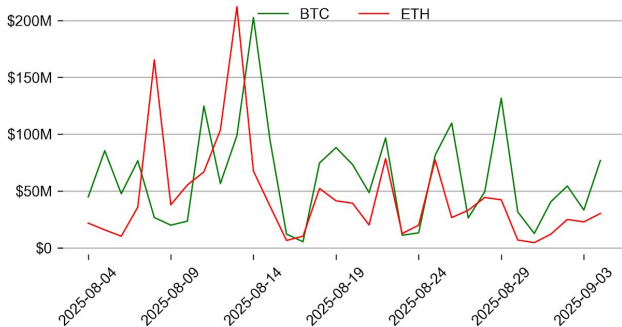
Futures O.I. & Liquidations



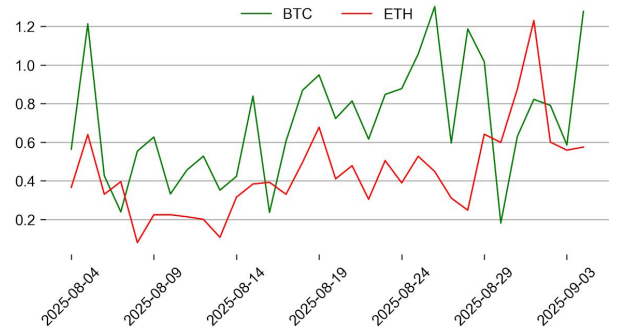
Perps Funding Rate & Rolling Basis



Option Volume



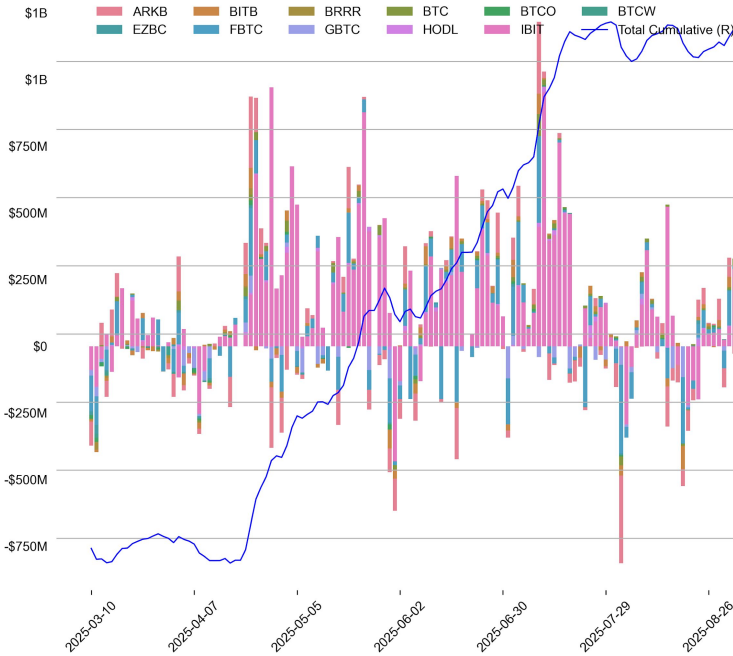
Put Call Ratio



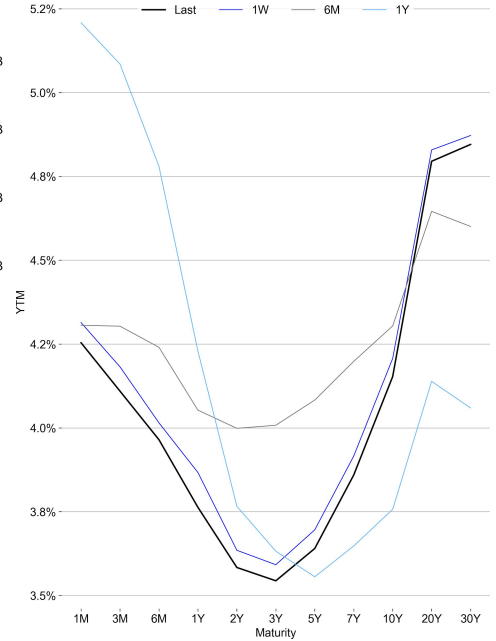
TRADFI

	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	6502.08	21707.69	5344.85	25058.51	4365.21	0.8579	148.43	7.1417	98.24	63.31	3609.60	306.80	327.59	15.13	13.16
1D	0.8%	1.0%	0.4%	-1.1%	-2.1%	0.0%	0.2%	-0.0%	0.1%	-1.0%	-0.7%	1.5%	-0.8%	-4.8%	-2.2%
1M	3.2%	3.8%	1.8%	0.6%	6.4%	-0.7%	0.6%	-0.6%	-0.5%	-2.8%	5.1%	3.0%	-12.7%	-3.1%	18.2%
1Y	17.8%	27.1%	10.2%	43.5%	34.2%	-4.9%	3.3%	0.4%	-3.1%	-8.5%	42.9%	88.0%	162.4%	1.7%	92.1%

BTC Spot ETF Flow

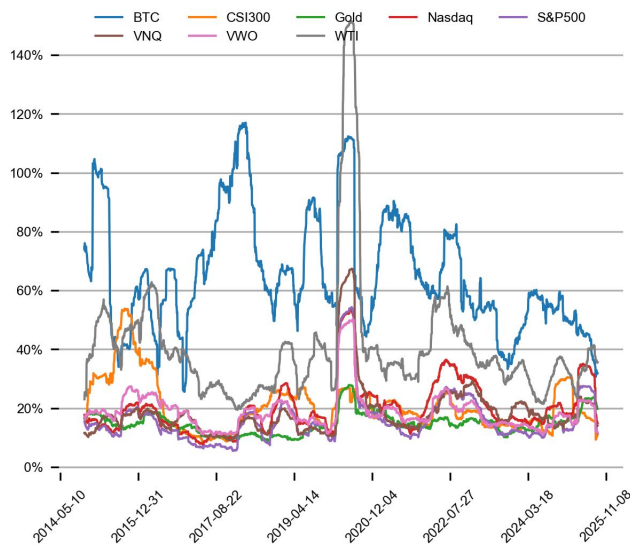


US Treasury Yield Curve

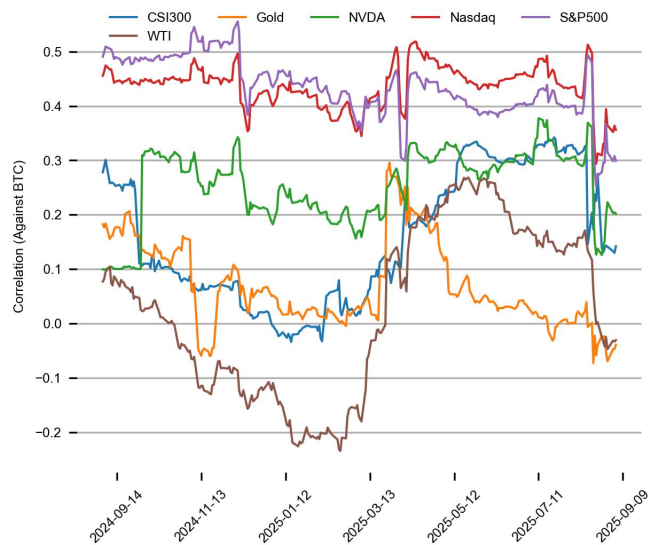


CROSS ASSET METRICS

Volatility



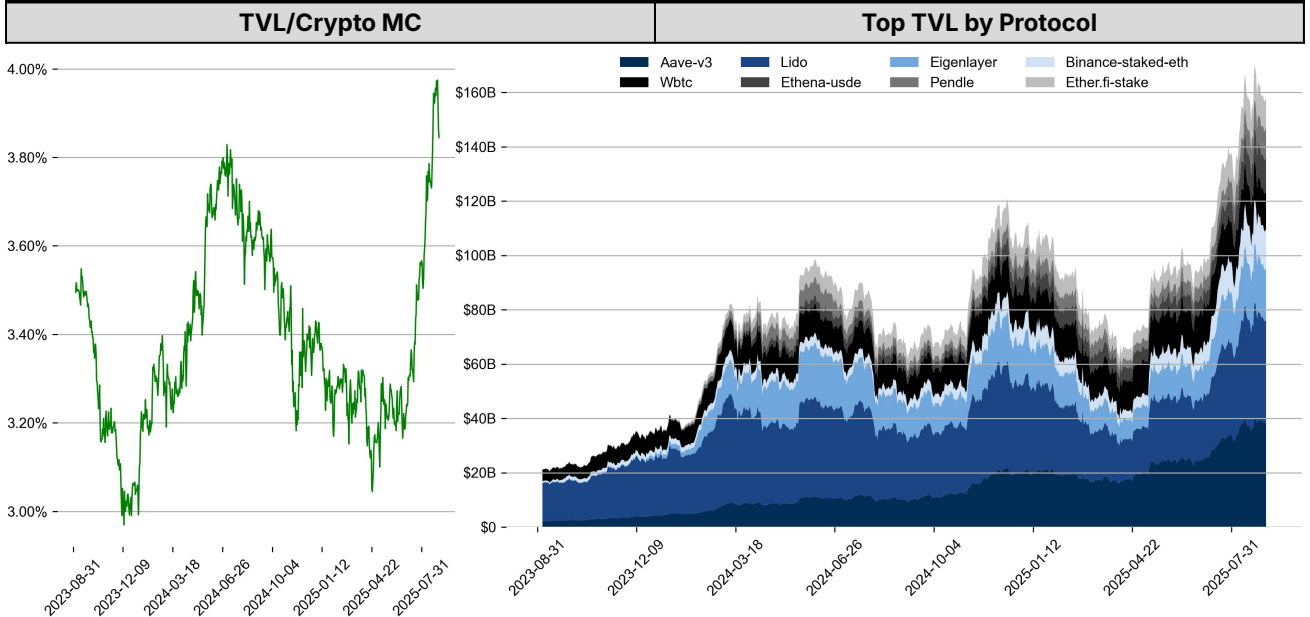
Correlation



STABLECOIN

Supply Change				USDT Prem/Disc
	Market Cap (\$mn)	Share	7D Change	
USDT_Trone	80,432	28.0%	-0.8%	
USDT_Ethereum	74,835	26.1%	+5.0%	
USDT_Omni	83	0.0%	0.0%	
USDC	72,229	25.2%	+4.5%	
DAI	5,131	1.8%	-1.2%	
FDUSD	902	0.3%	-1.9%	
Others	53,479	18.6%	+2.9%	
Total	287,091	100.0%	+2.7%	

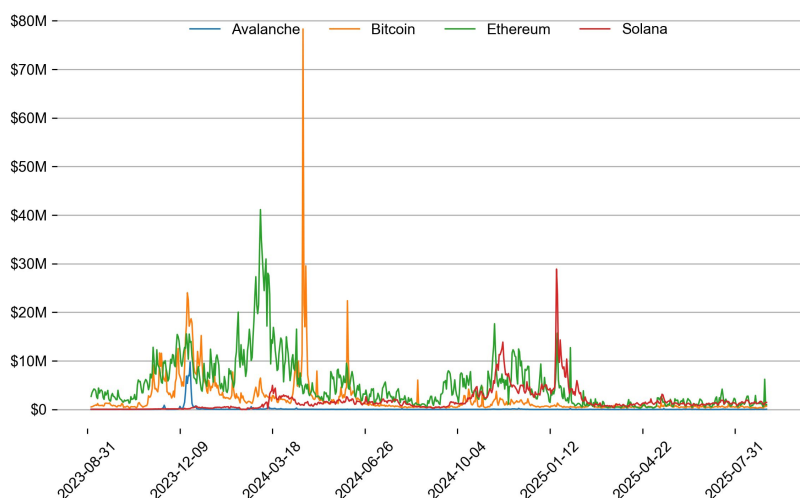
ONCHAIN MOVES



Top TVL Gainers*

#	Name	7D Change
1	Hyperithm	+191.4%
2	Jupiter Lend	+57.1%
3	Etherex CL	+48.6%
4	Midas RWA	+42.1%
5	Figure Markets Exchange	+30.9%

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
Aug 1, 2025	US Nonfarm Payrolls	
Aug 1, 2025	\$162M Unlock	\$SUI
Aug 5, 2025	Binance Alpha	\$TOWNS
Aug 6, 2025	S2 Airdrop	\$ME
Aug 7, 2025	US Reciprocal Tariffs Effective Date	
Aug 8, 2025	Launchpad	\$ORCA
Aug 12, 2025	US CPI	
Aug 12, 2025	\$17M Unlock	\$LAYER
Aug 14, 2025	US PPI	
Aug 15, 2025	Earnings Call	\$SBET
Aug 15, 2025	\$38.9M Unlock	\$AVAX
Aug 20, 2025	\$28.4M Unlock	\$KAITO
Aug 21, 2025	Fee Switch	\$RESOLV
Aug 21, 2025	Jackson Hole	
Aug 26, 2025	\$13M Unlock	\$HUMA
Aug 27, 2025	Earnings Call	\$NVDA
Aug 29, 2025	Iran Nuclear Deal Deadline	

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	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.
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 Layer GG	Events Calendar provides a summary of major events happening throughout the month.

* The Daily Market Brief is published every business day, following the Singapore calendar, excluding public holidays

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