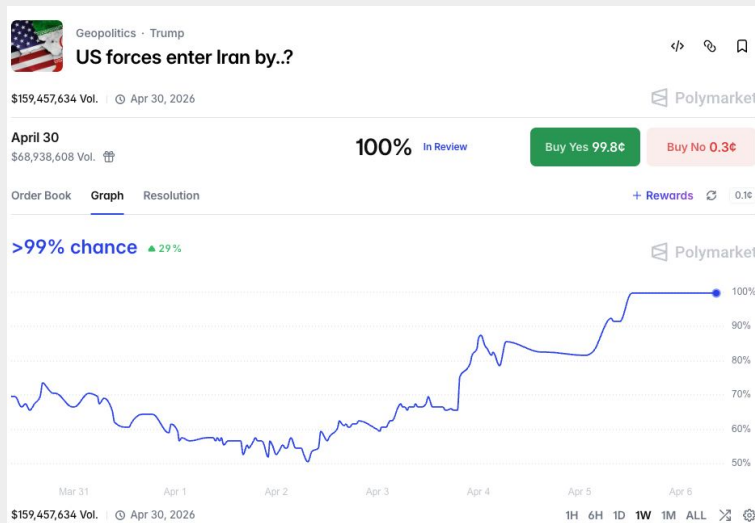


| | | | | | | | |
|------------|----------------------|-------------------|--------------------|---------------|-----------------------|-------------|---------------------|
| BTC | \$69,011.94 +2.5% | S&P500 | 6,582.69 +0.1% | US 10Y | 4.3630% +0.0180PPT | WTI | \$114.28 +2.0% |
| ETH | \$2,108.94 +2.1% | Nasdaq | 21,879.18 +0.2% | DXY | 100.26 +0.2% | Gold | \$4,636.37 -1.4% |

- \$BTC traded rangebound over the weekend before gaining momentum into the Asia open. As of now, \$BTC is trading at \$69,011 and \$ETH is trading at \$2,108, with Bitcoin dominance at 59.02%.
- This week’s calendar includes the U.S. ISM Non-Manufacturing PMI on Monday, U.S. crude oil inventories on Wednesday, the U.S. Core PCE Price Index on Thursday, and the U.S. Consumer Price Index on Friday.
- A few headlines over the weekend include: Drift says exploit linked to a months-long social engineering operation by DPRK-linked actors; Tether is making a final push for a new funding round, targeting a valuation of around \$500 billion; and Charles Schwab has opened a waitlist for direct bitcoin and ether trading, targeting a limited launch in Q2.
- During the last 24 hours, the top three gainers were \$Z, \$M, and \$B, while the top three losers were \$KITE, \$RAIN, and \$RIVER.

Polymarket’s Iran Rescue Controversy

Polymarket is facing controversies over its handling of war-related markets. After removing a betting market on the rescue of missing US Air Force pilots due to political backlash, the platform is now embroiled in another strife involving its \$159 million market, “U.S. forces enter Iran by...?” Odds on the market spiked to 100% following the announcement of the pilots’ rescue, but resolution remains hotly debated as participants disagree on whether the operation constitutes “entering Iran.” Critics argue that, historically, such rescue missions have not counted as “boots on the ground.” Contrary to the Silicon Valley mantra that “software is eating the world,” the episode highlights that the real world still requires human judgment and centralized decision-making. It’s a reminder that crypto’s notable adoption successes (e.g., stablecoins, ETFs, and RWA) have all relied on elements of centralization.



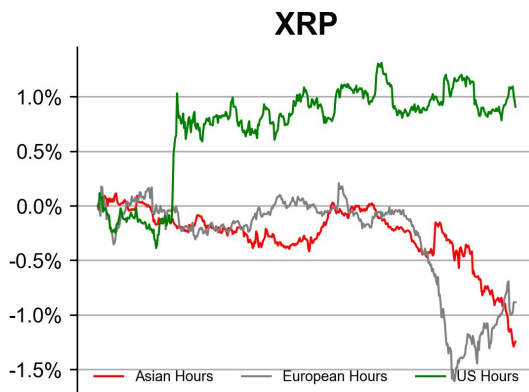
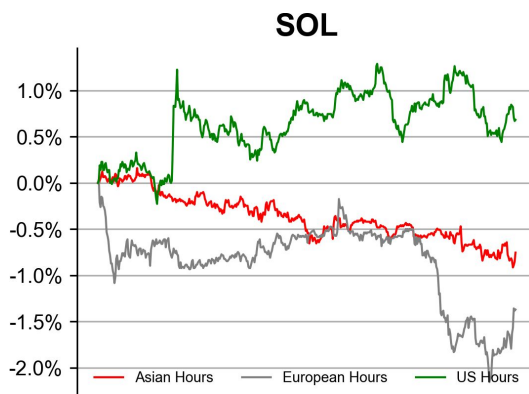
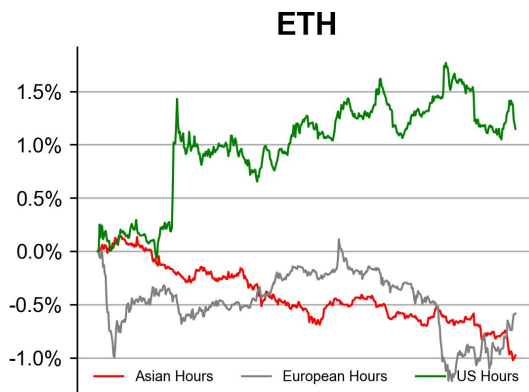
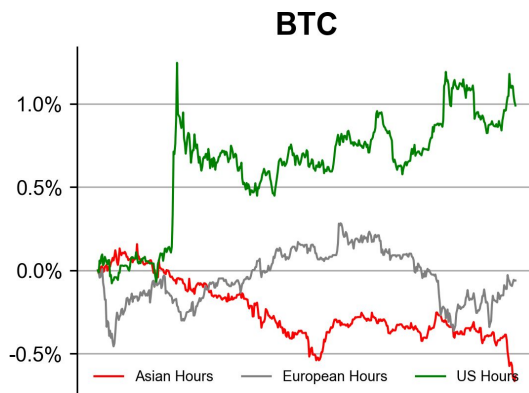
Source: Polymarket

PRICE ACTIONS

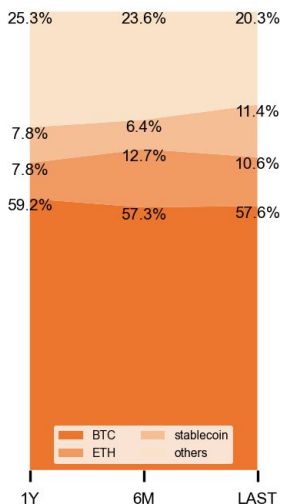
24H Price Change (Top/Bottom 25 from Top 200)

| | | |
|--------|--------|---------|
| OM | - | +400.8% |
| 2Z | +11.2% | |
| M | +7.6% | |
| B | +6.8% | |
| JST | +6.0% | |
| REAL | +4.5% | |
| EDGE | +4.0% | |
| VVV | +3.9% | |
| XPL | +3.8% | |
| MON | +3.6% | |
| HASH | +3.4% | |
| SIREN | +3.2% | |
| QNT | +2.8% | |
| TAO | +2.7% | |
| OHM | +2.7% | |
| FT | +2.7% | |
| SUN | +2.6% | |
| BTC | +2.5% | |
| BTSE | +2.5% | |
| LIT | +2.5% | |
| ETHFI | +2.4% | |
| DCR | +2.3% | |
| PEPE | +2.3% | |
| SPX | +2.3% | |
| KAG | +2.2% | |
| THETA | -1.8% | |
| BSV | -1.8% | |
| AXS | -1.8% | |
| PYTH | -2.0% | |
| IP | -2.1% | |
| POL | -2.2% | |
| S | -2.2% | |
| BGB | -2.2% | |
| XEC | -2.3% | |
| DEXE | -2.5% | |
| TWT | -2.5% | |
| ZEC | -2.5% | |
| ZRO | -2.9% | |
| BCH | -3.1% | |
| IOTA | -3.3% | |
| WLD | -3.5% | |
| UDS | -3.9% | |
| PENDLE | -4.0% | |
| H | -4.7% | |
| ZBCN | -5.6% | |
| RIVER | -6.5% | |
| RAIN | -10.5% | |
| KITE | -14.6% | |
| USYC | | |
| BCAP | | |

Time Zone Analysis



Dominance Ratio

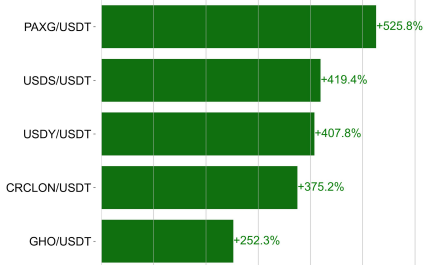


Sector Performance

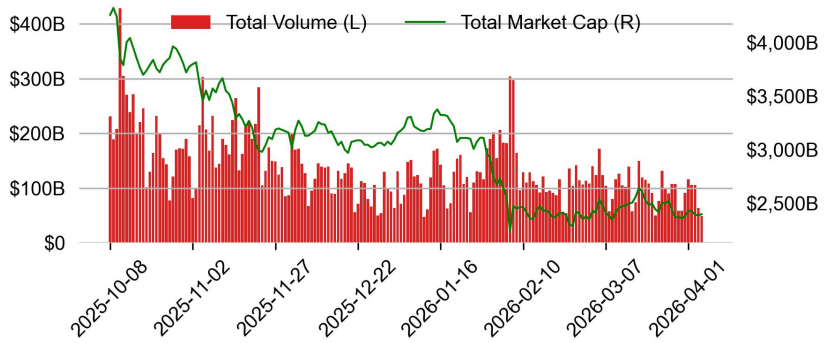
| | | |
|--------------|-------|--------|
| RWA | - | +83.5% |
| Digital Gold | +2.5% | |
| Layer 1 | +1.6% | |
| Oracle | +1.3% | |
| AI | +1.2% | |
| CEX | +1.1% | |
| DEX | +0.8% | |
| Memecoin | +0.3% | |
| Layer 2 | +0.3% | |
| DeFi | +0.2% | |
| Dino Coins | +0.0% | |
| DePIN | +0.0% | |
| BTC Eco | -0.5% | |
| Gaming | -0.8% | |
| Bridge | -2.9% | |

TRADING VOLUME

24H Vol % Chg*

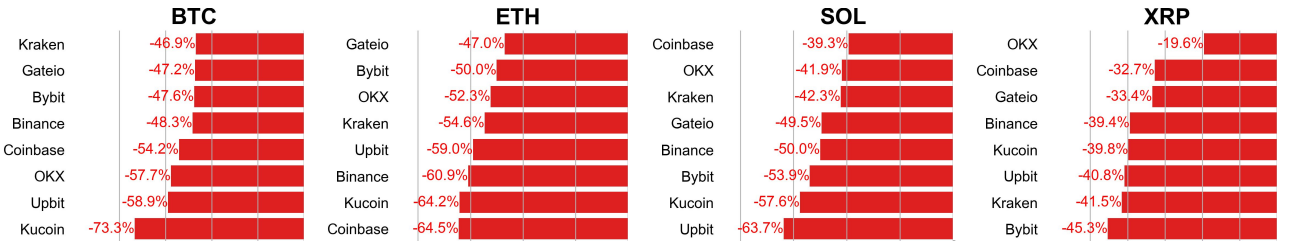


Spot Volume



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

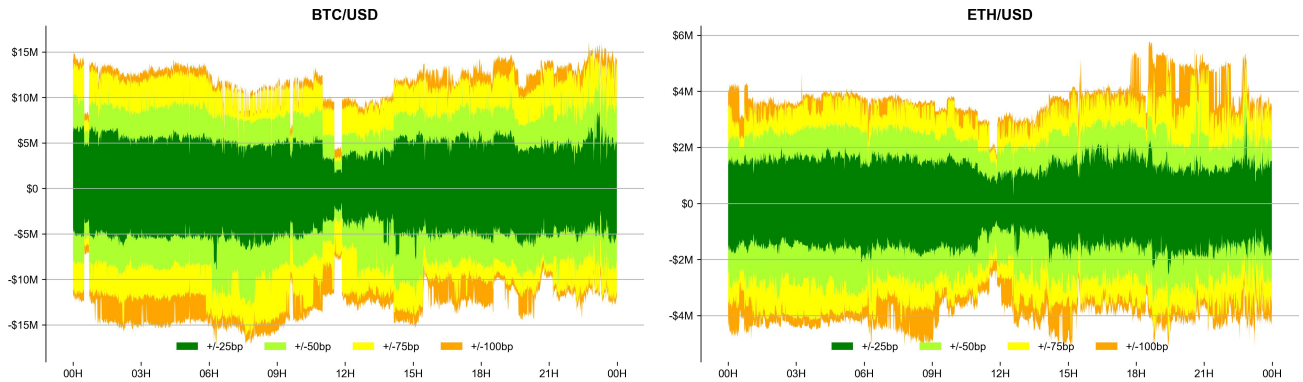
Spot Volume Leaders (% chg vs ave)*



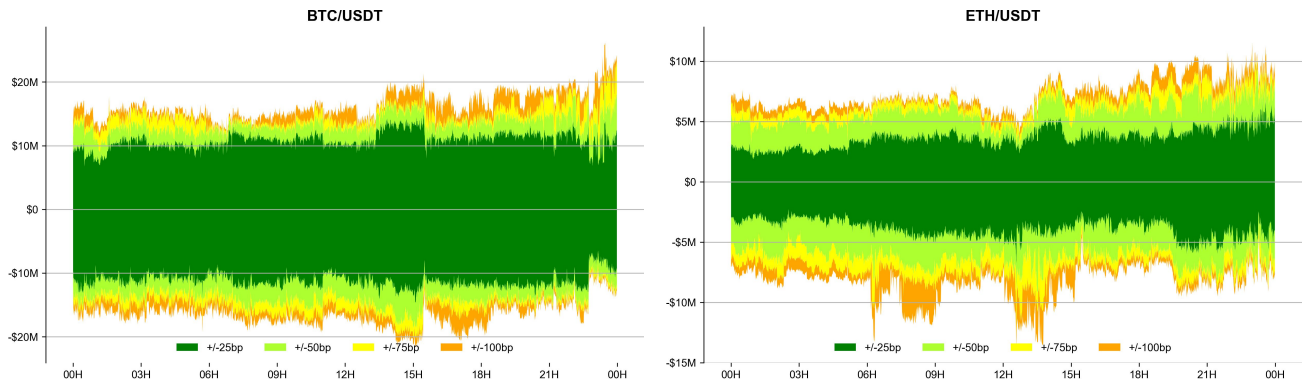
* ranked by the % difference between the 24H volume vs. the 30-day average

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

Coinbase

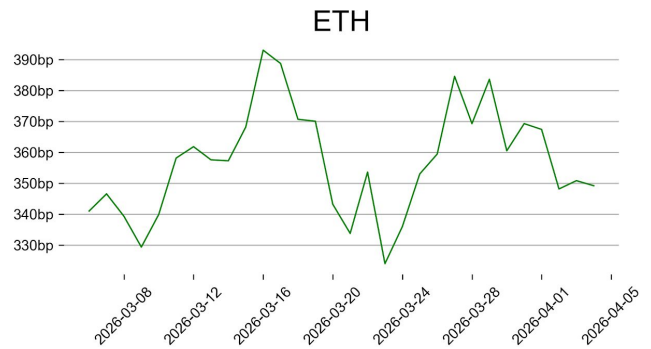
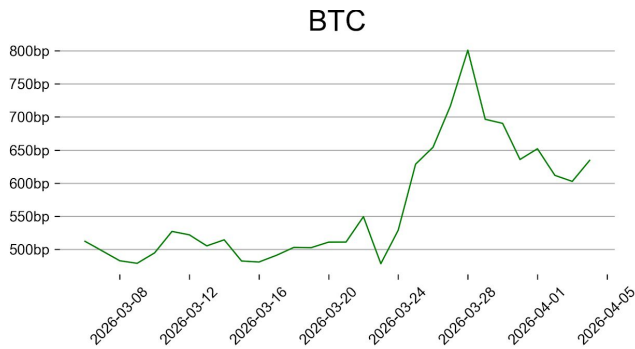


Binance

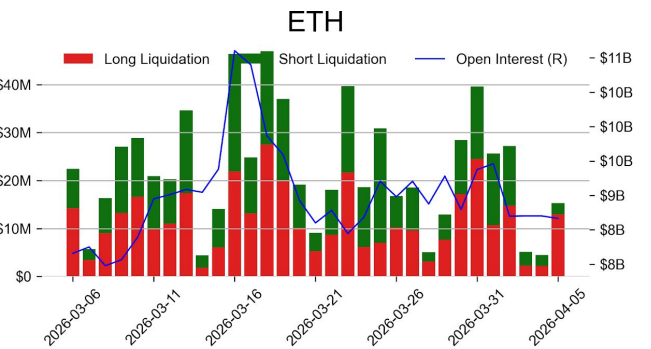
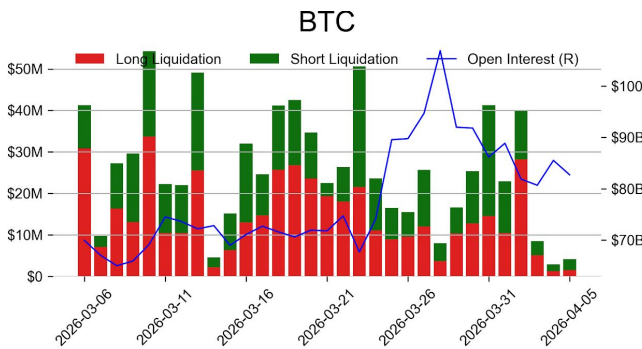


DERIVATIVES

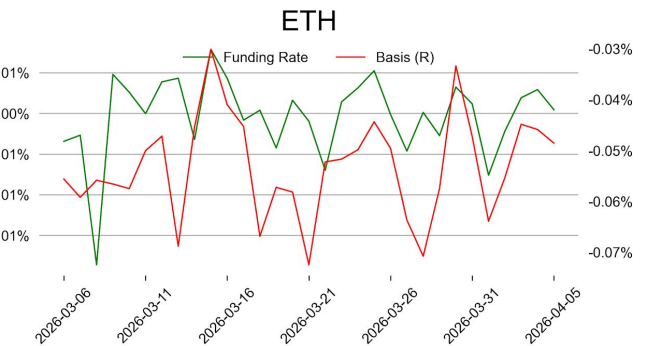
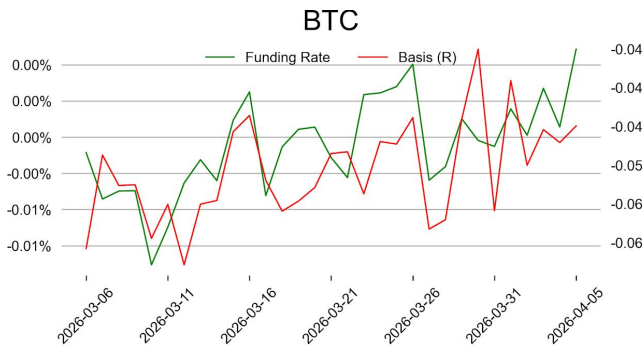
Open Interest / Market Cap



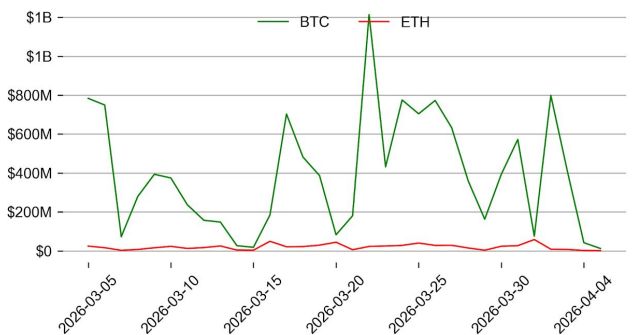
Futures O.I. & Liquidations



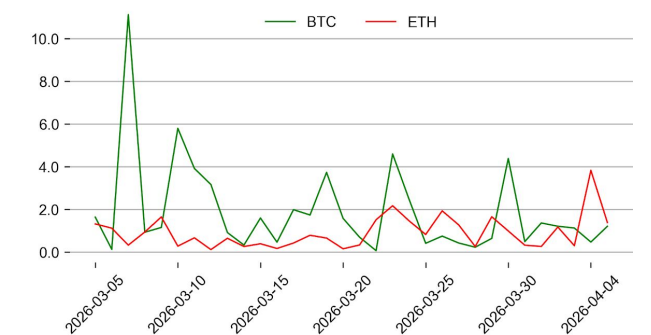
Perps Funding Rate & Rolling Basis



Option Volume



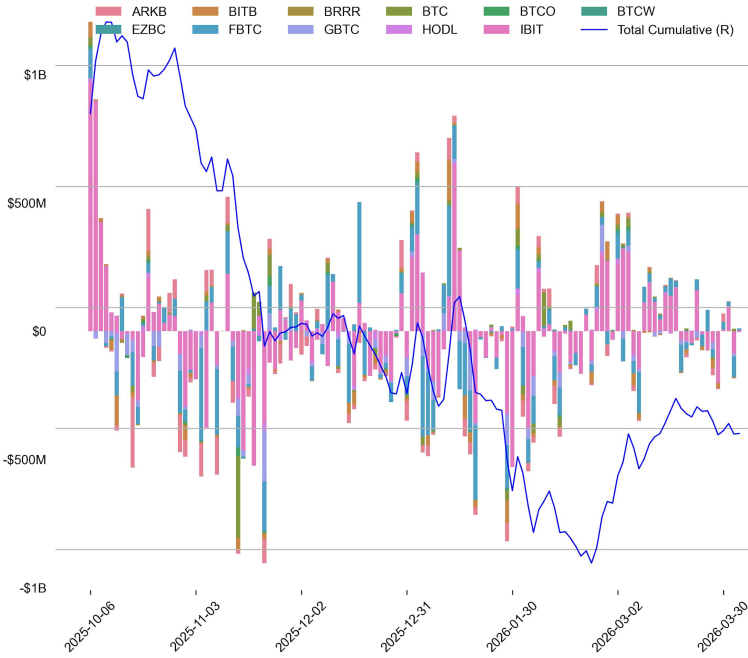
Put Call Ratio



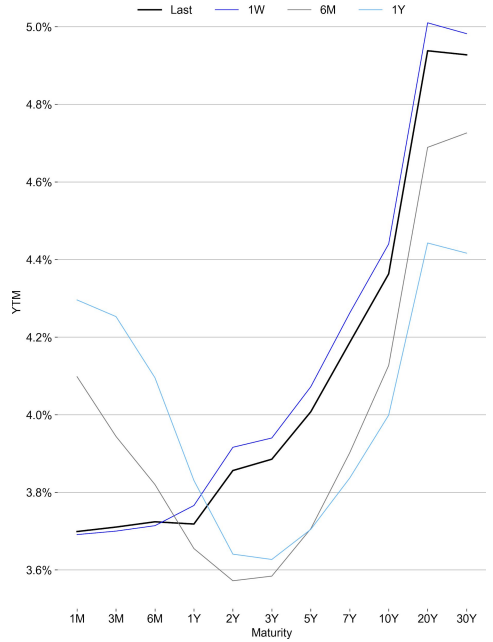
TRADFI

| | 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 | 6582.69 | 21879.18 | 5692.86 | 25116.53 | 4440.79 | 0.8688 | 159.78 | 6.8826 | 100.26 | 114.28 | 4636.37 | 171.46 | 119.83 | 8.71 | 12.86 |
| 1D | 0.1% | 0.2% | -0.7% | -0.7% | -0.9% | 0.1% | 0.1% | -0.1% | 0.2% | 2.0% | -1.4% | -0.9% | -2.4% | 8.3% | 2.5% |
| 1M | -3.4% | -2.8% | -1.4% | -2.5% | -3.5% | 0.9% | 1.3% | -0.2% | 1.3% | 25.7% | -10.1% | -6.0% | -9.7% | 0.6% | -15.9% |
| 1Y | 16.1% | 24.3% | 7.3% | 8.2% | 15.0% | -4.8% | 8.8% | -5.5% | -2.7% | 84.4% | 52.7% | -6.3% | -61.7% | -29.9% | 60.3% |

BTC Spot ETF Flow

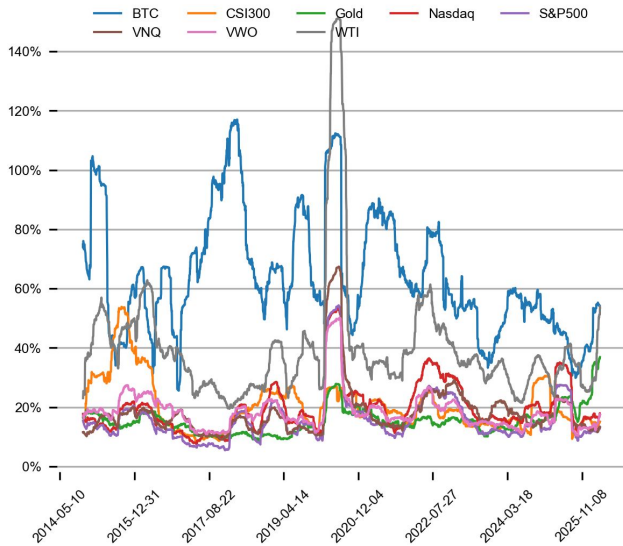


US Treasury Yield Curve

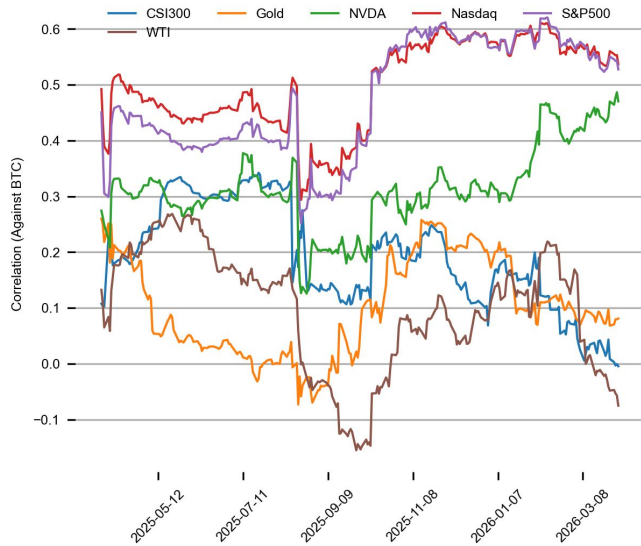


CROSS ASSET METRICS

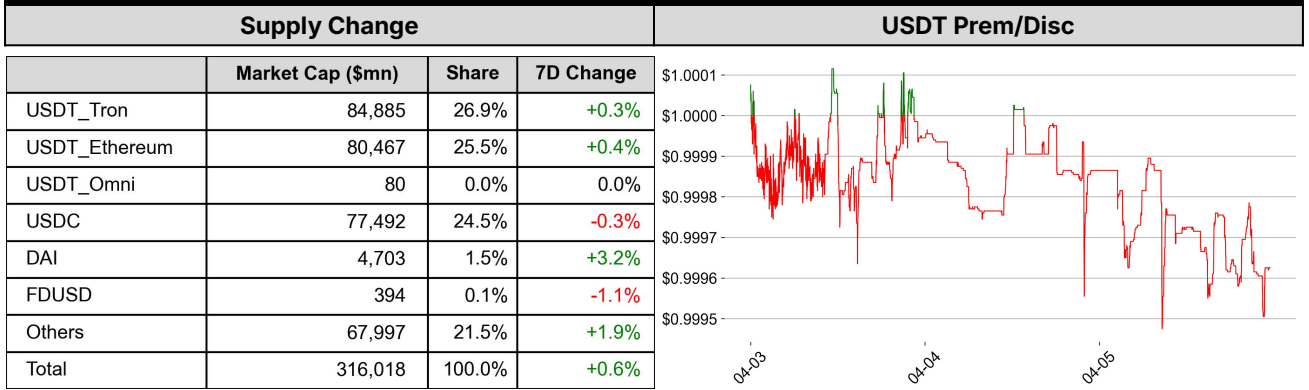
Volatility



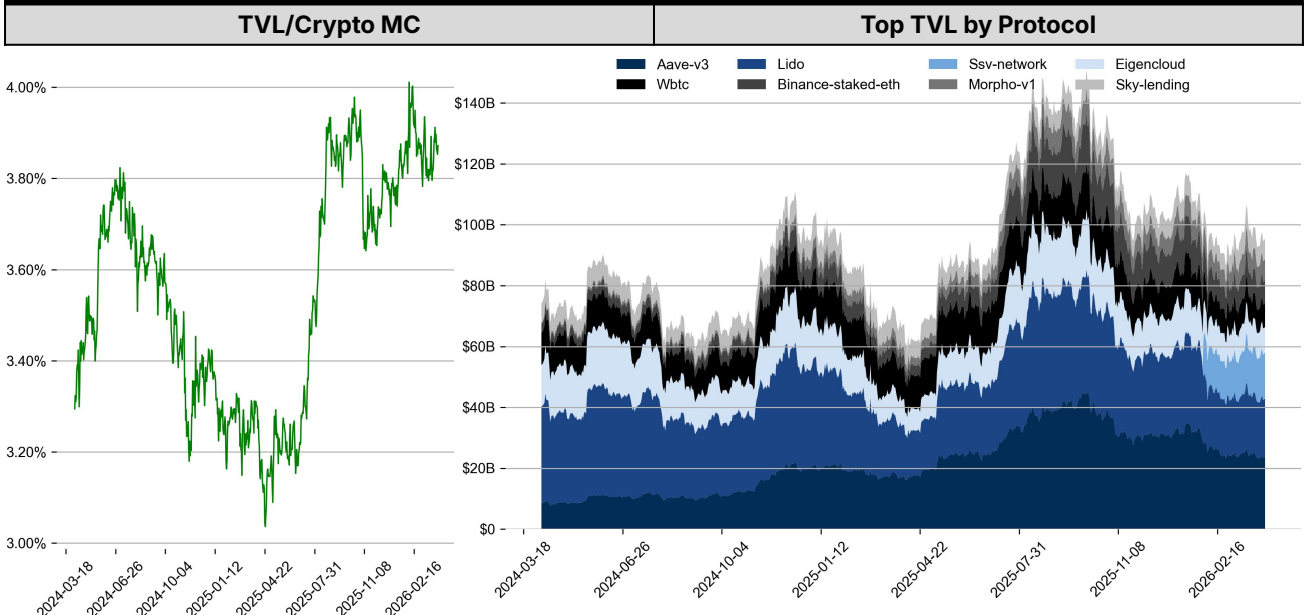
Correlation



STABLECOIN



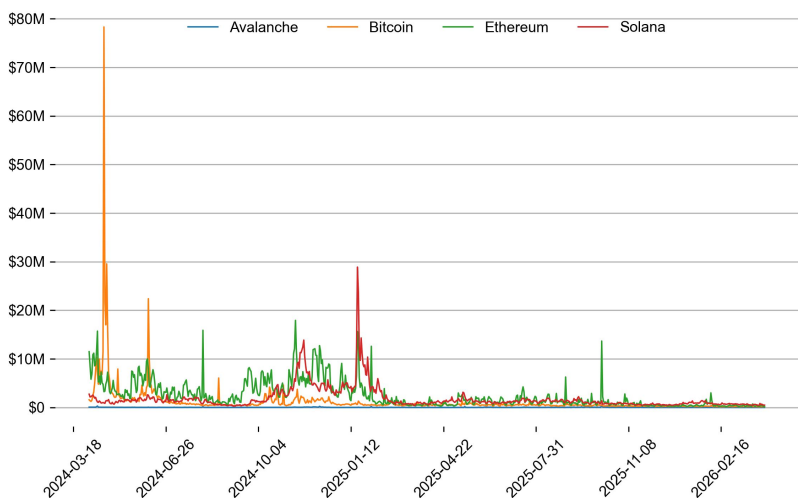
ONCHAIN MOVES



Top TVL Gainers*

| # | Name | 7D Change |
|---|--------------------|-----------|
| 1 | Superstate USTB | +44.5% |
| 2 | Dolomite | +37.3% |
| 3 | Mellow Core | +35.4% |
| 4 | Ondo Yield Assets | +24.3% |
| 5 | Reservoir Protocol | +22.6% |

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

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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