



Daily Market Brief
May 29, 2026 (UTC -02:00)

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BTC	\$73,605.85 -1.1%	S&P500	7,563.78 +0.6%	US 10Y	4.4500% -0.0310PPT	WTI	\$88.53 -0.2%
ETH	\$2,009.93 -0.8%	Nasdaq	26,917.47 +0.9%	DXY	99.00 -0.2%	Gold	\$4,525.90 +1.0%

- \$BTC is once again down as \$IBIT records \$528M in outflows. As of now \$BTC is trading at \$73,605 and \$ETH is trading at \$2,009. Bitcoin dominance stands at 60.23%.
- The Digital Chamber launched a new advocacy website urging crypto supporters to push lawmakers to pass the Clarity Act. The campaign comes ahead of the U.S. midterm elections, with crypto-backed political groups increasingly supporting pro-crypto candidates and framing the bill as a key issue for the growing number of American crypto holders.
- A few other headlines include: FalconX confidentially files for IPO with the SEC targeting a year-end listing, the Sui blockchain temporarily stopped producing blocks for nearly an hour, and Aave v3 WETH liquidity recovers above pre-crisis levels.
- During the last 24 hours, the top three gainers were \$XLM, \$H, and \$XPL, while the top three losers were \$UB, \$WLD, and \$BEAT.

Goodbye CME Gaps: CME’s Competitive 24/7 Move

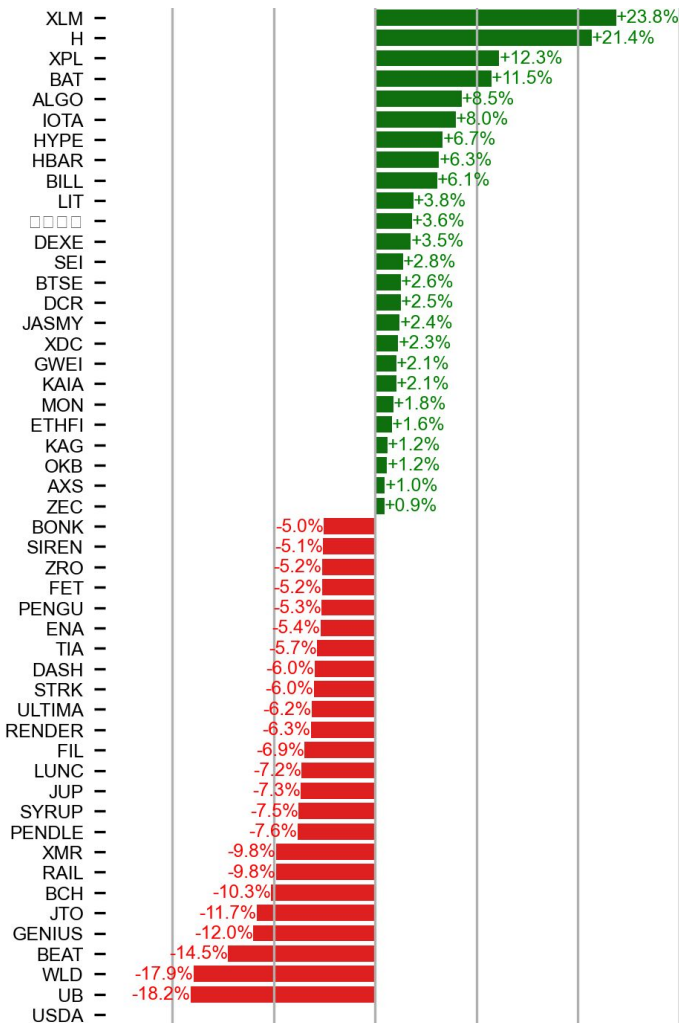
Crypto traders, beware: An important shift is occurring this weekend. CME Group is launching 24/7 trading, with only brief maintenance shutdowns, for Bitcoin and other crypto futures and options tonight at 4:30 p.m. CT. Near-term, the famous “CME gaps” disappear. The long-standing quirk, caused by weekend trading-hour differences with the 24/7 BTC spot market, has been a key trading signal for years. Longer-term, the move reflects CME’s push to stay competitive, not only against regulated venues, but also unregulated platforms such as Hyperliquid. CME, along with peer ICE, recently urged the CFTC to scrutinize and regulate Hyperliquid over manipulation and sanctions risks. That said, CME’s blockchain strategy remains selective and pragmatic. Rather than reinventing the wheel, it opts for a targeted approach, applying the technology only where it matters most, such as post-trade efficiencies via tokenized assets, collateral management, and wholesale payments through its Google Cloud partnership. This may be the formula for how blockchain becomes relevant in the real world.



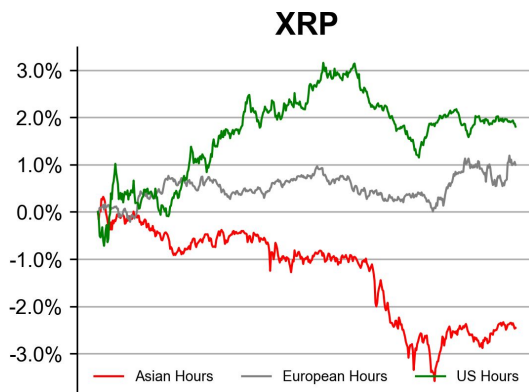
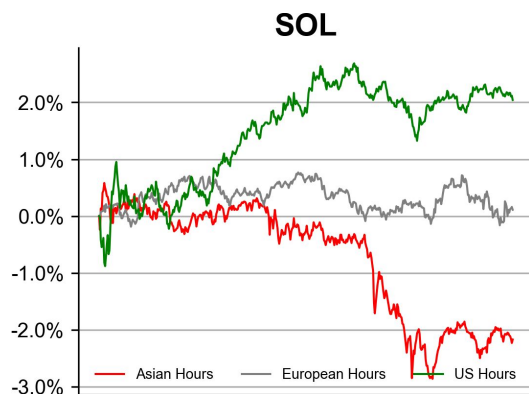
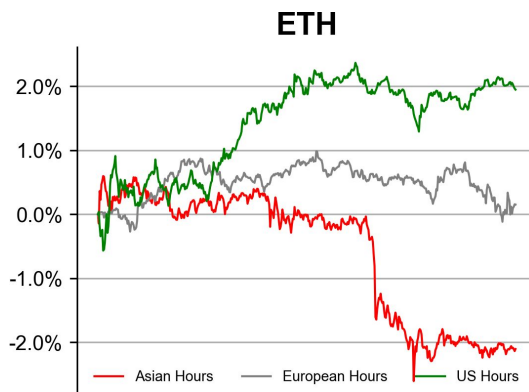
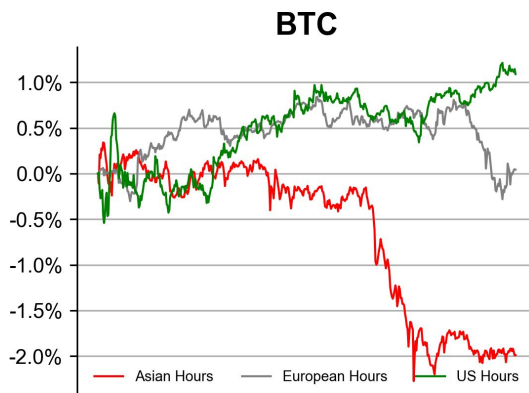
Sources: CME

PRICE ACTIONS

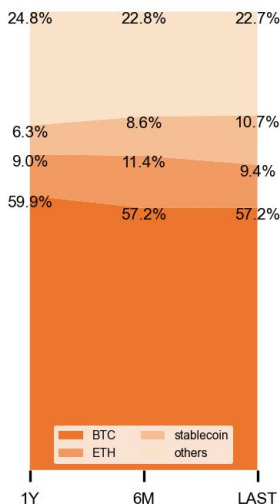
24H Price Change (Top/Bottom 25 from Top 200)



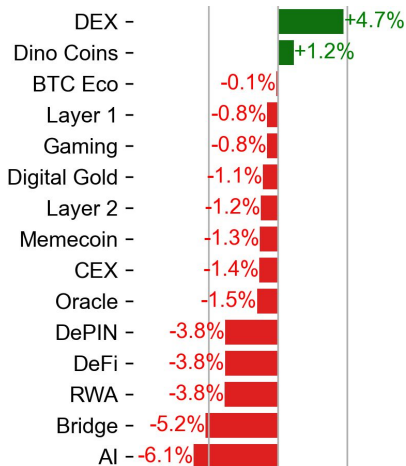
Time Zone Analysis



Dominance Ratio

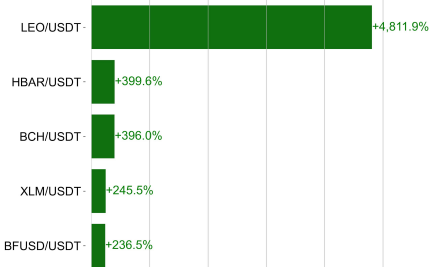


Sector Performance

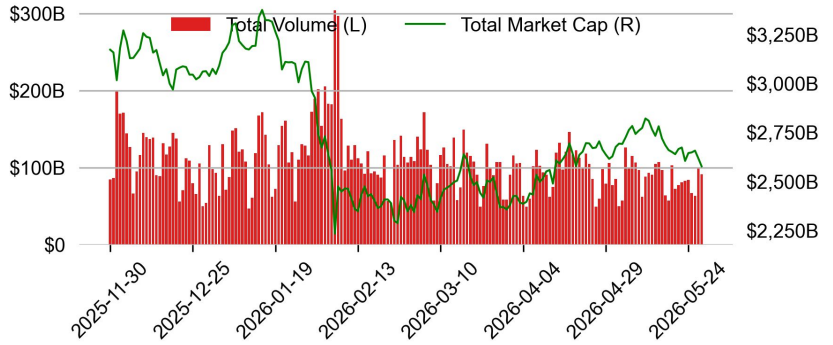


TRADING VOLUME

24H Vol % Chg*

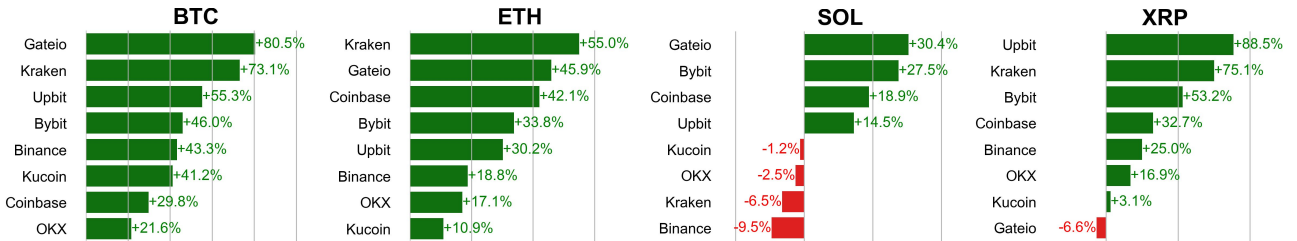


Spot Volume



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

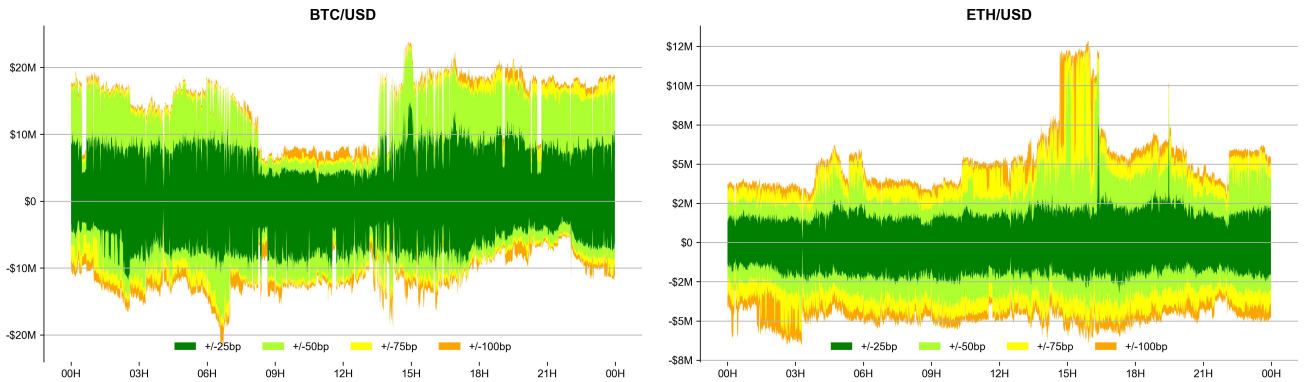
Spot Volume Leaders (% chg vs ave)*



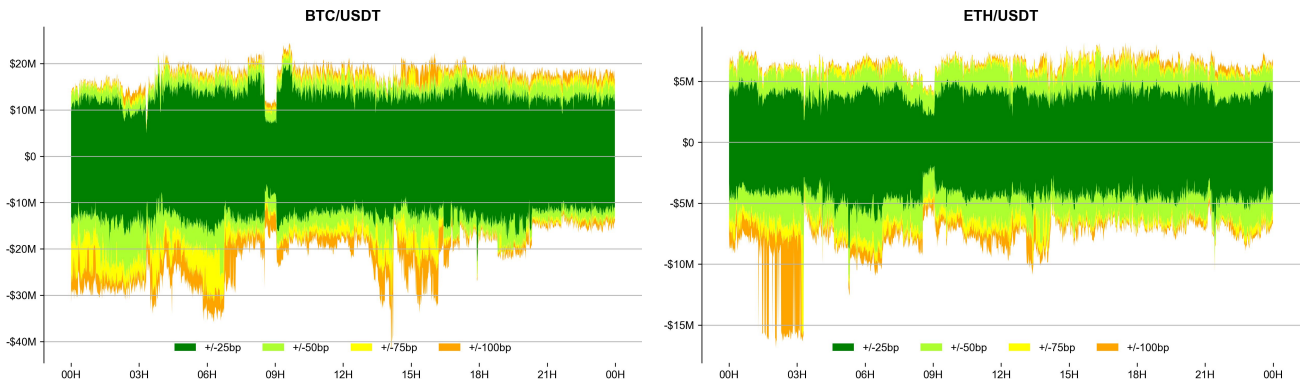
* ranked by the % difference between the 24H volume vs. the 30-day average

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

Coinbase

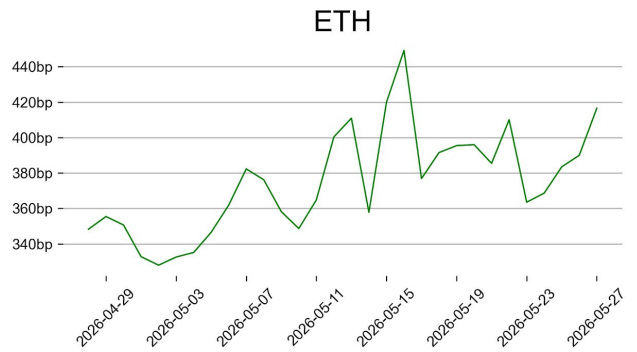
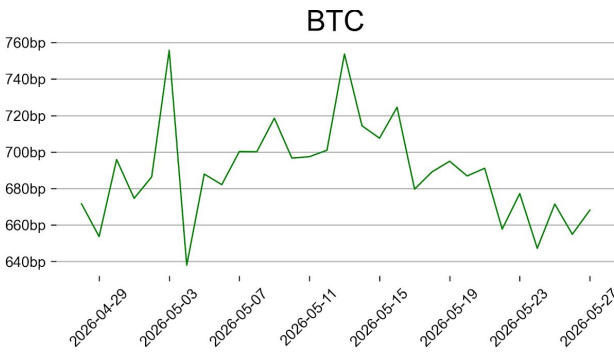


Binance

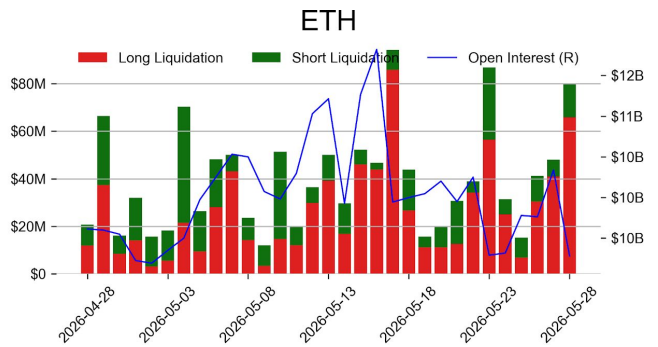
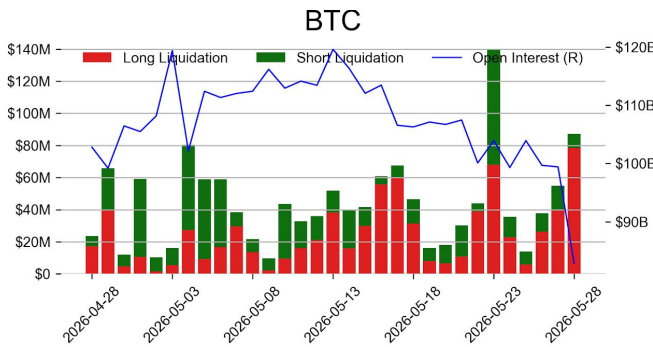


DERIVATIVES

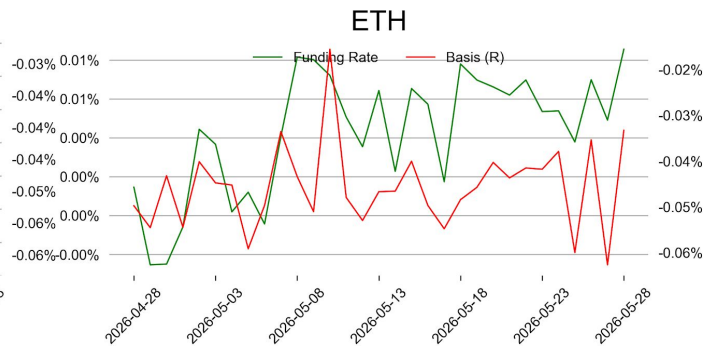
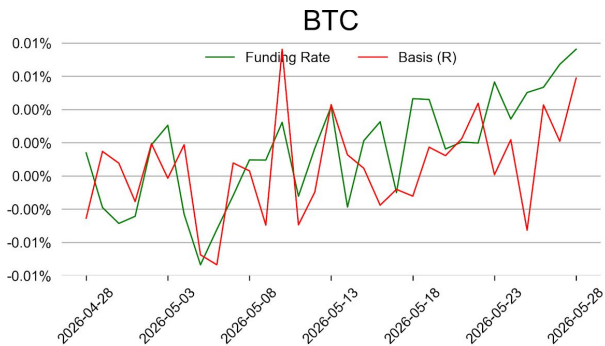
Open Interest / Market Cap



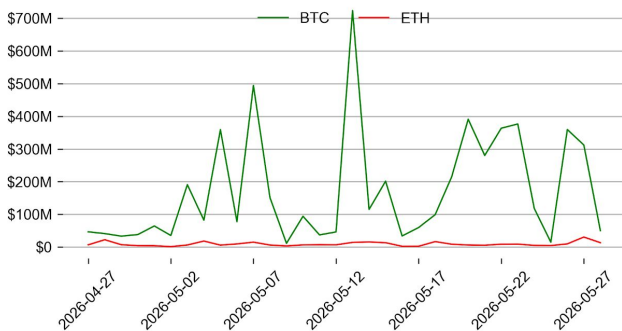
Futures O.I. & Liquidations



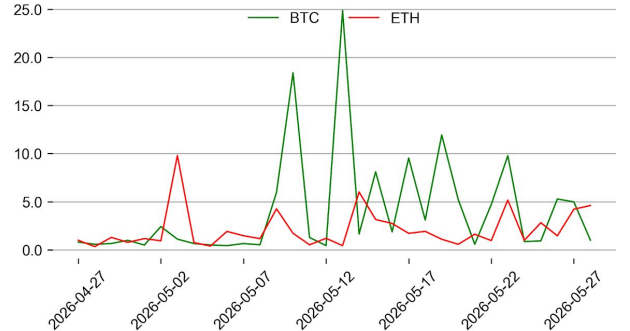
Perps Funding Rate & Rolling Basis



Option Volume



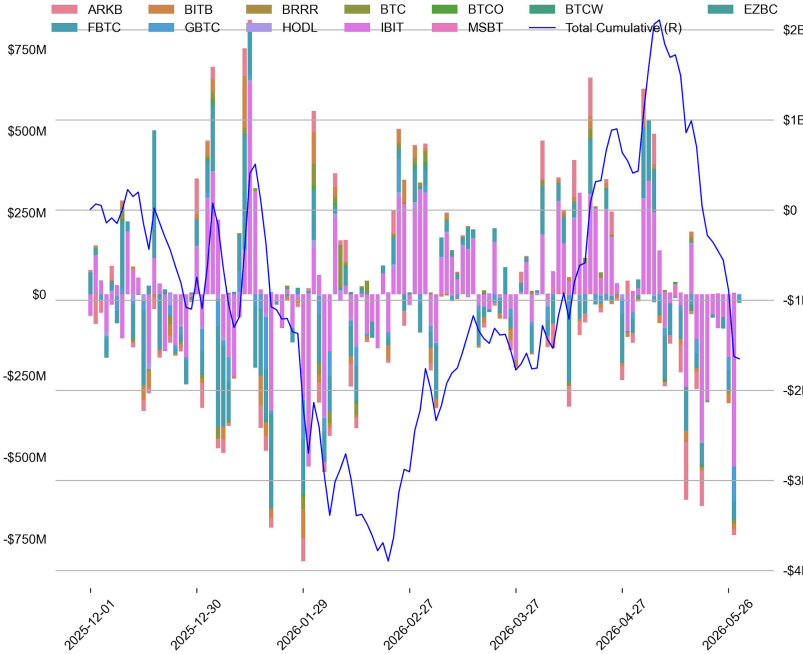
Put Call Ratio



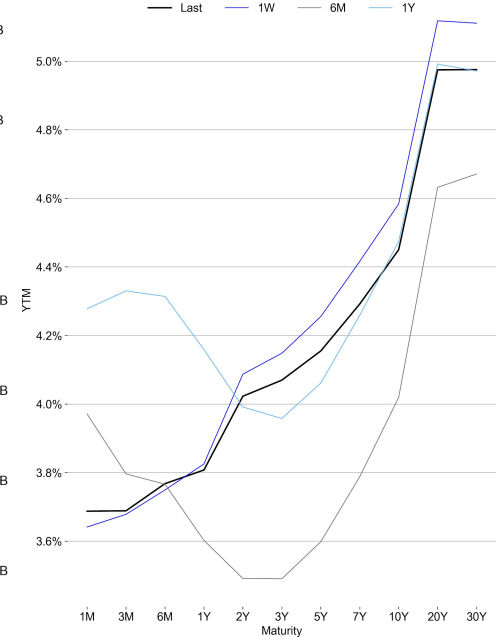
TRADFI

	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	7563.78	26917.47	6054.05	25006.16	4914.21	0.8581	159.27	6.7799	99.00	88.53	4525.90	182.24	151.64	14.06	27.73
1D	0.6%	0.9%	-0.3%	-1.3%	0.1%	-0.2%	-0.2%	0.0%	-0.2%	-0.2%	1.0%	4.9%	-1.7%	-1.9%	2.9%
1M	6.0%	9.1%	3.7%	-2.6%	3.3%	0.5%	-0.2%	-0.8%	0.4%	-11.4%	-1.4%	-6.1%	-8.5%	27.6%	67.4%
1Y	28.4%	40.9%	12.6%	7.5%	28.1%	-3.1%	10.0%	-5.8%	-0.9%	43.2%	36.8%	-28.3%	-58.4%	-5.4%	230.9%

BTC Spot ETF Flow

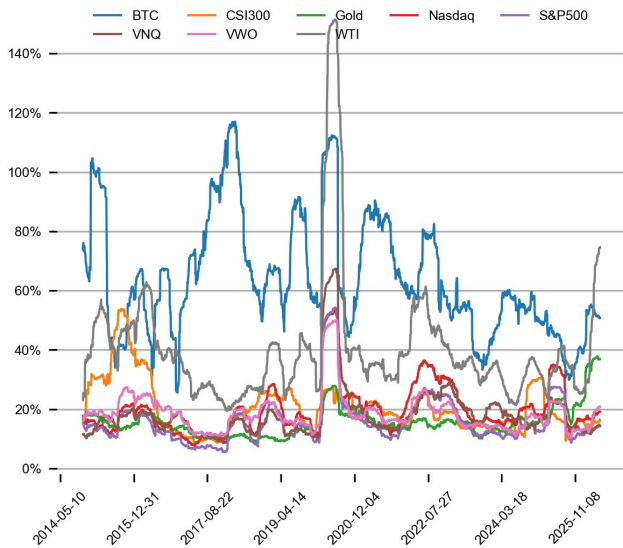


US Treasury Yield Curve

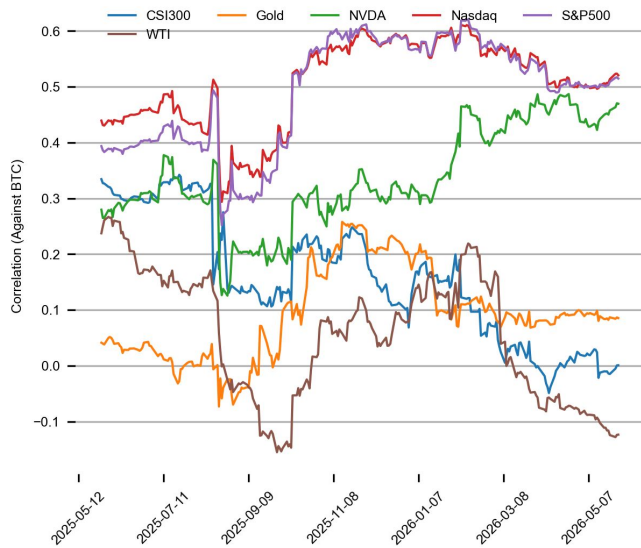


CROSS ASSET METRICS

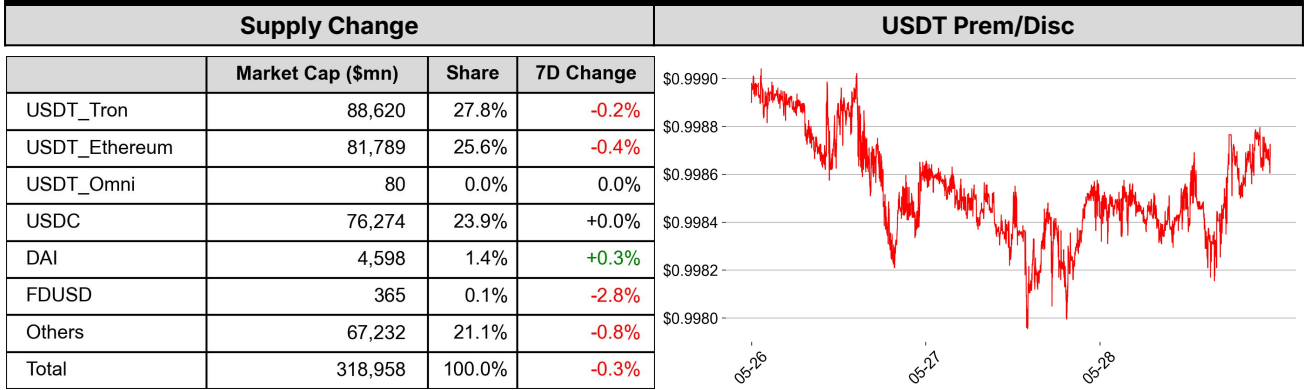
Volatility



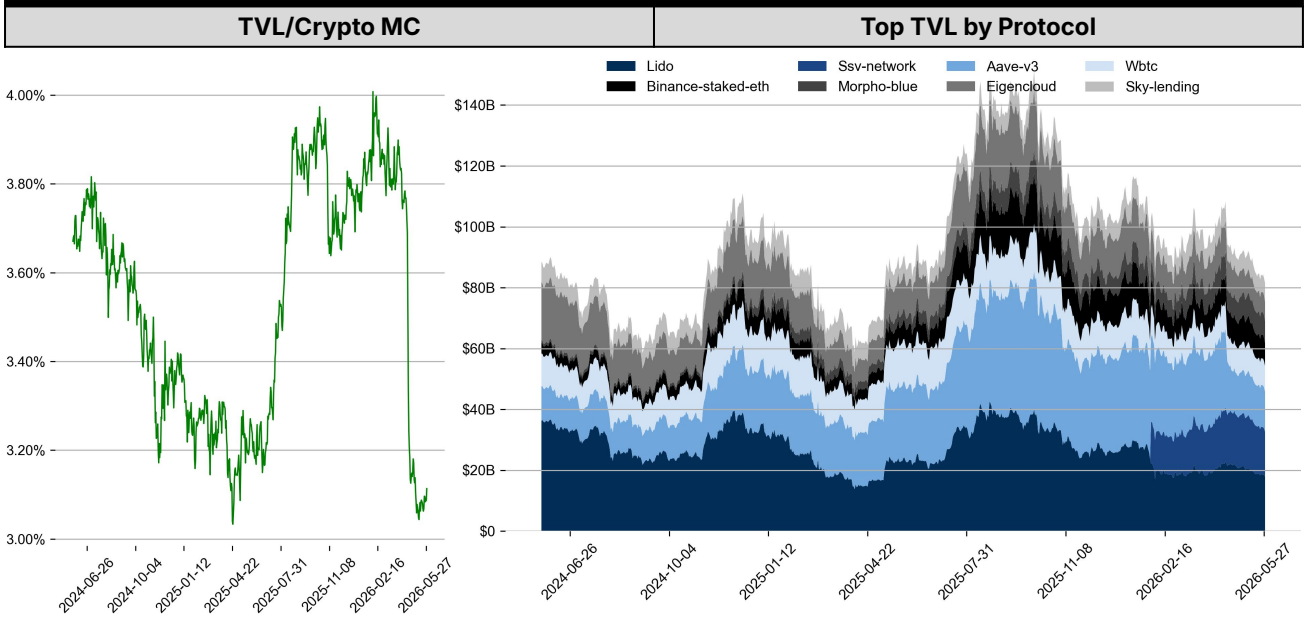
Correlation



STABLECOIN



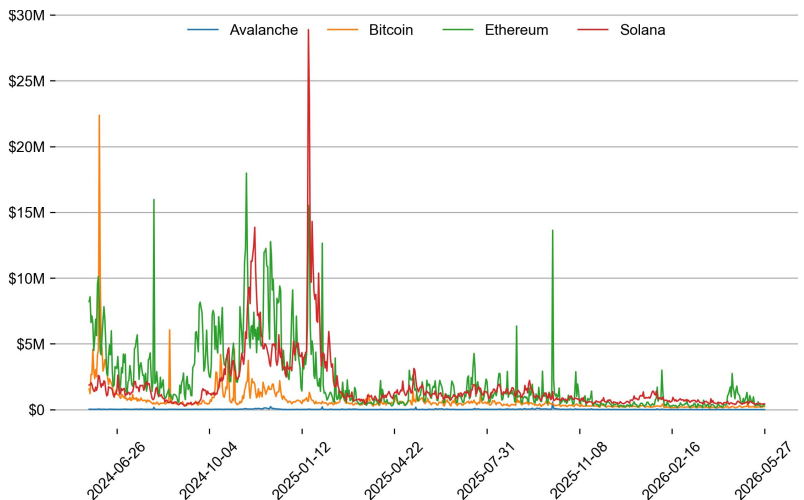
ONCHAIN MOVES



Top TVL Gainers*

#	Name	7D Change
1	Saturn	+38.5%
2	Blend Pools V2	+35.9%
3	Solstice	+24.9%
4	Spark Savings	+24.8%
5	Rhea Lend	+23.7%

Daily Network Fees



* 5 largest 7 day TVL change in % terms from the universe of minimum \$100m TVL protocols, according to DefiLlama.

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

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