



**Daily Market Brief**  
**Mar 10, 2026 (UTC -02:00)**

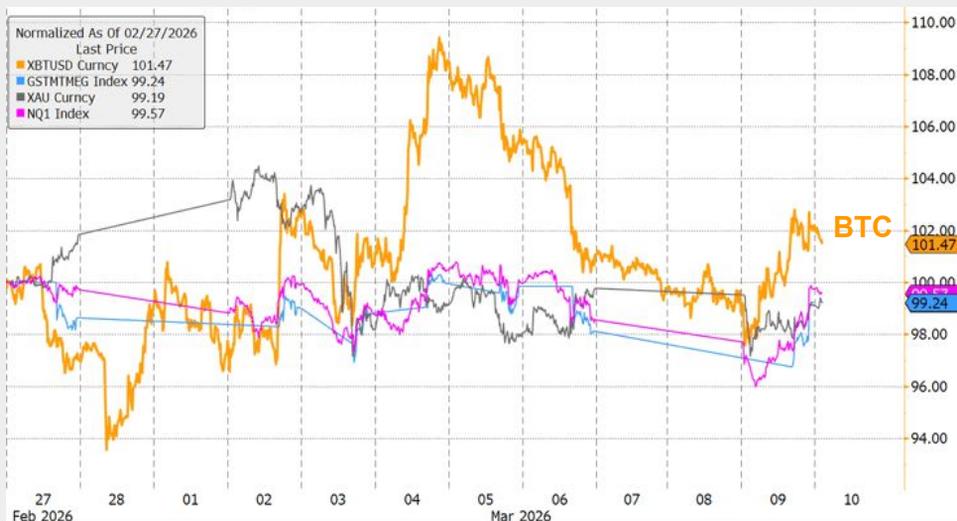
**Peter Chung** | Head of Research  
**Min Jung** | Research Associate

<b>BTC</b>	\$68,435.50 +3.7%	<b>S&amp;P500</b>	6,795.90 +0.8%	<b>US 10Y</b>	4.1100% -0.0810PPT	<b>WTI</b>	\$88.69 -17.9%
<b>ETH</b>	\$1,994.03 +2.9%	<b>Nasdaq</b>	22,695.95 +1.4%	<b>DXY</b>	98.87 -0.7%	<b>Gold</b>	\$5,149.66 +1.3%

- \$BTC rebounded as oil prices fell, though macro uncertainty lingers. As of now \$BTC is trading at \$68,435 and \$ETH is trading at \$1,994. Bitcoin dominance stands at 59.08%.
- Trump announced a temporary easing of some oil-related sanctions to stabilize supply and lower prices until the Strait of Hormuz normalizes, noting recent oil price increases have been less severe than feared. Meanwhile, oil prices have fallen about 30% from their highs, while Hyperliquid’s HIP-3 markets reached a record \$1.2B in open interest amid rising demand for oil exposure.
- A few other headlines include: Kast raises \$80 million at a \$600 million valuation, Strategy acquired 17,994 BTC for ~\$1.28 billion at ~\$70,946 per BTC, and Nasdaq partners with Kraken in a tokenization push.
- During the last 24 hours, the top three gainers were \$DEXE, \$HYPE, and \$GRASS, while the top three losers were \$RIVER, \$VVV, and \$CC.

**Resilience in the Headwinds: Bitcoin’s Quiet Bottom?**

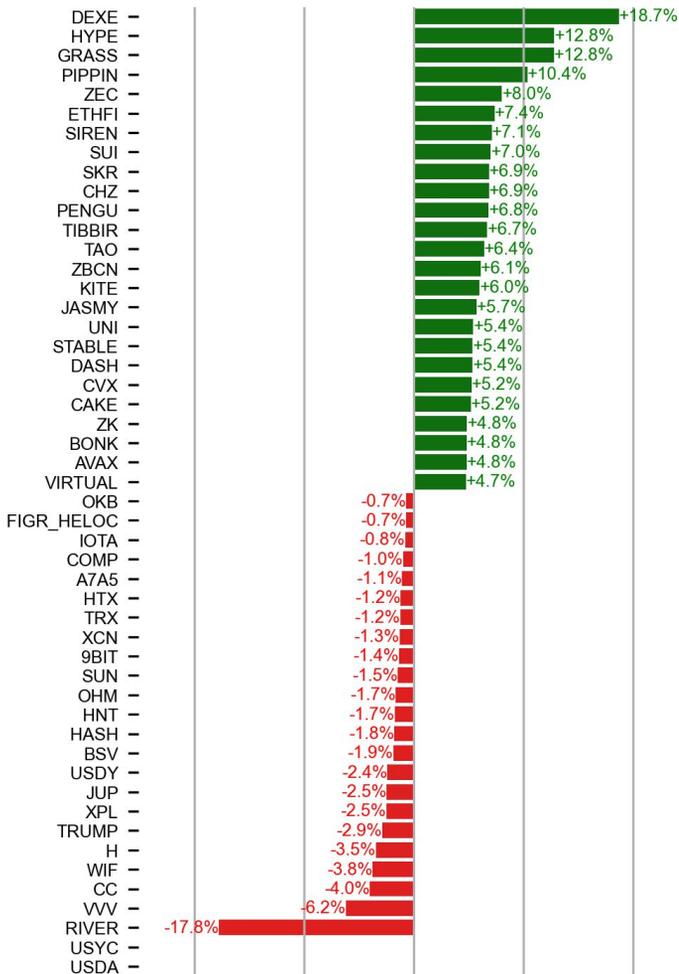
In the current tenuous market environment, one asset class continues to deliver pleasant surprises: Bitcoin. Financial markets are flashing risk-off signals, such as rising US yields, a strong USD, and tightening liquidity, which are conditions historically linked to Bitcoin slumps. Yet BTC’s price action has remained remarkably resilient, particularly since the outbreak of the US-Iran conflict. Bulls are pointing to this strength as evidence that the bottom is in. It may be too early to say definitively, but last year’s opposite dynamic offers some credence to the view. Despite a favorable backdrop – i.e., falling US yields, a weak USD, and accelerating institutional adoption – Bitcoin repeatedly failed to break through its \$125K peak. If that repeated rejection signaled a top, then today’s resilience amid headwinds could indeed signal that the bottom is in.



Source: Bloomberg

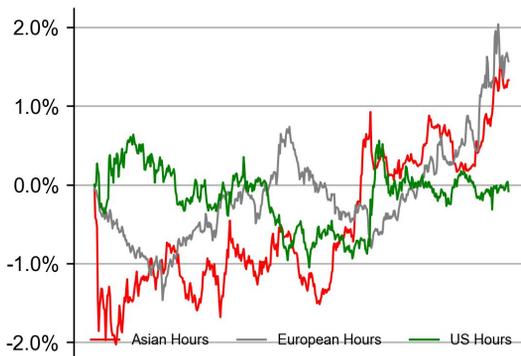
# PRICE ACTIONS

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

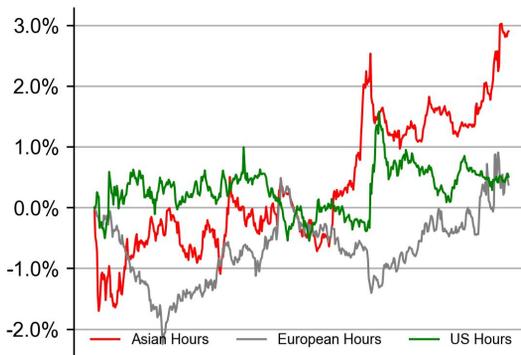


## Time Zone Analysis

### BTC



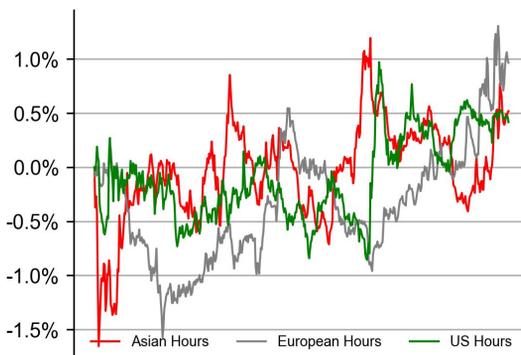
### ETH



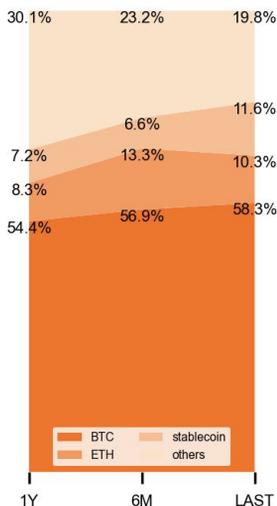
### SOL



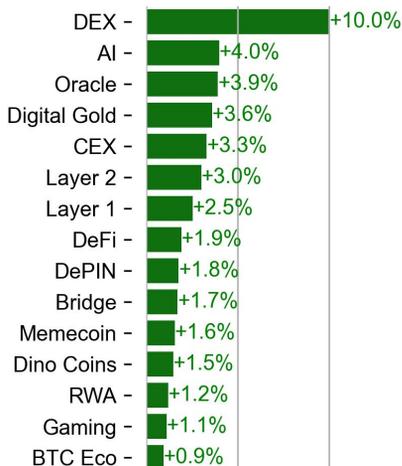
### XRP



## Dominance Ratio

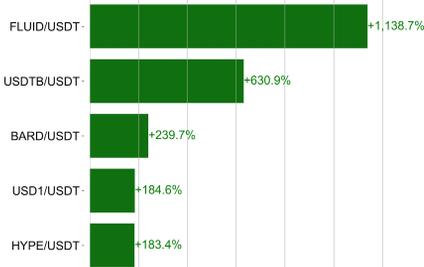


## Sector Performance



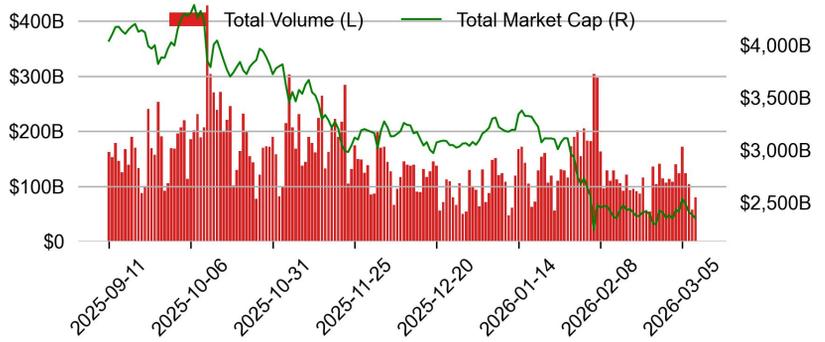
# TRADING VOLUME

## 24H Vol % Chg\*

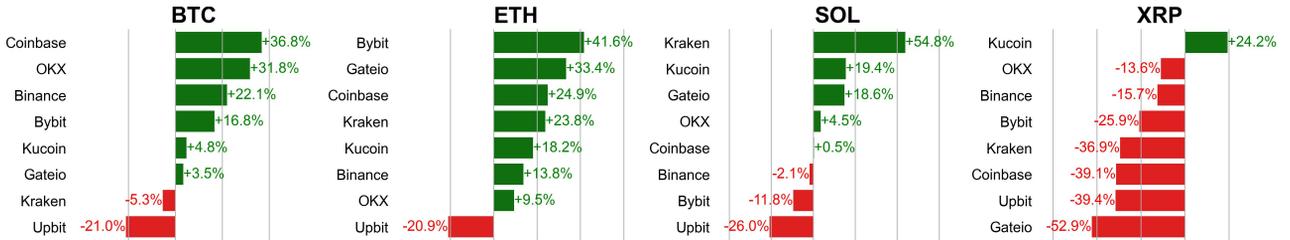


\* 5 largest 24H vol. change from the universe of top 50 assets by market cap

## Spot Volume



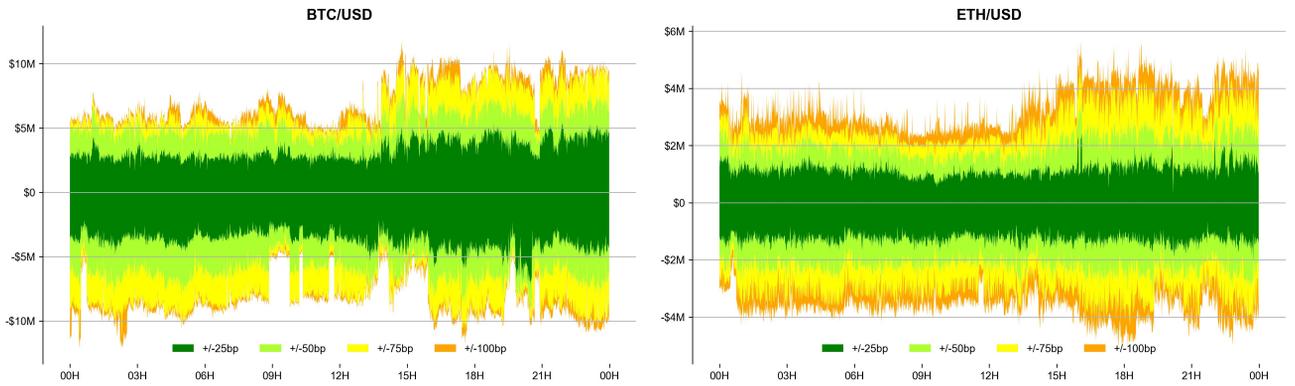
## Spot Volume Leaders (% chg vs ave)\*



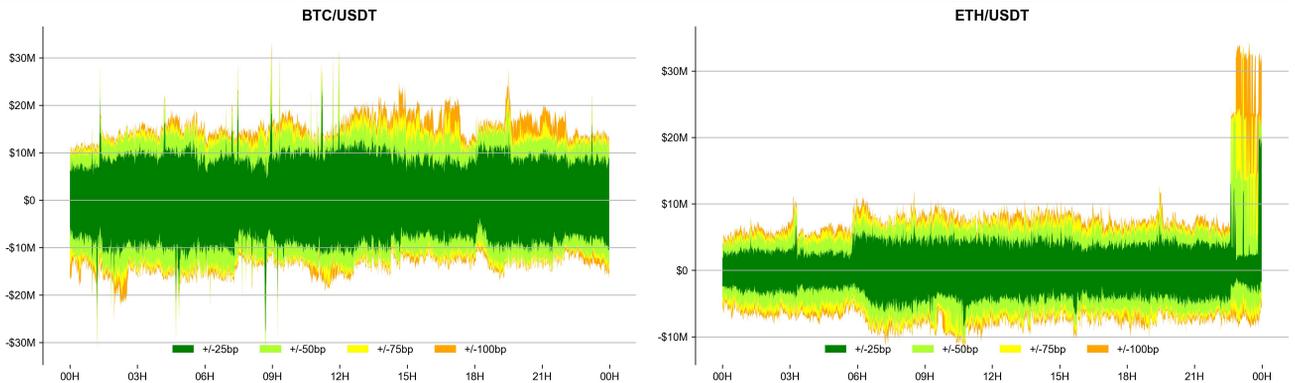
\* ranked by the % difference between the 24H volume vs. the 30-day average

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

### Coinbase

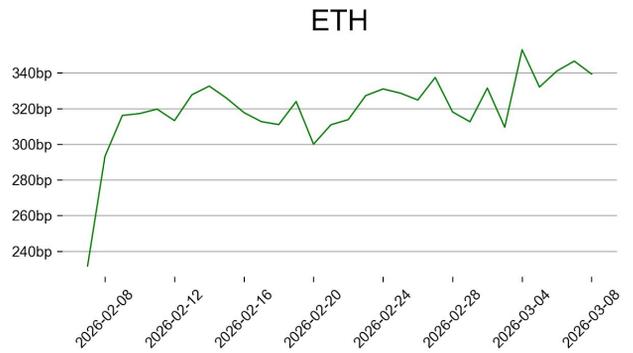
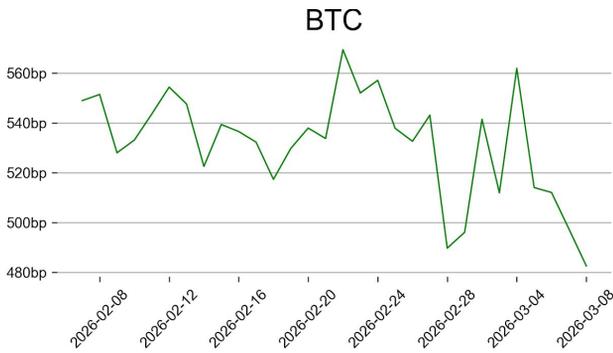


### Binance

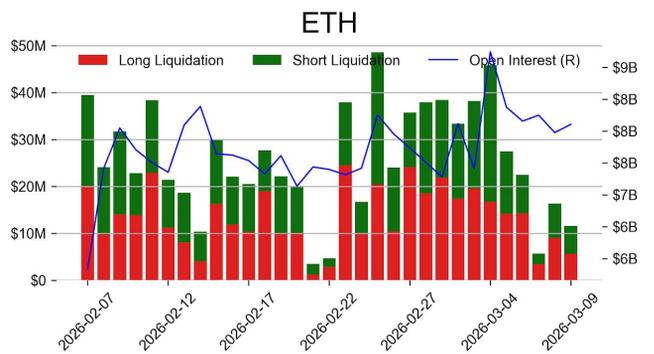
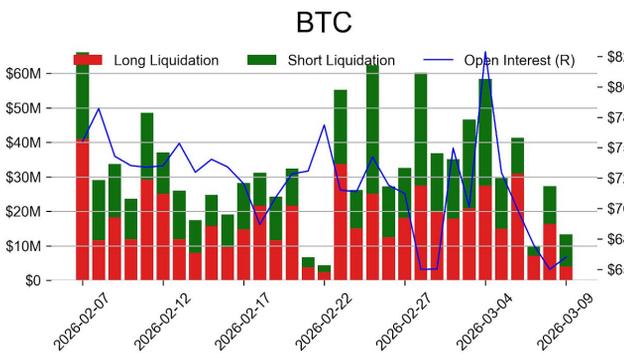


## DERIVATIVES

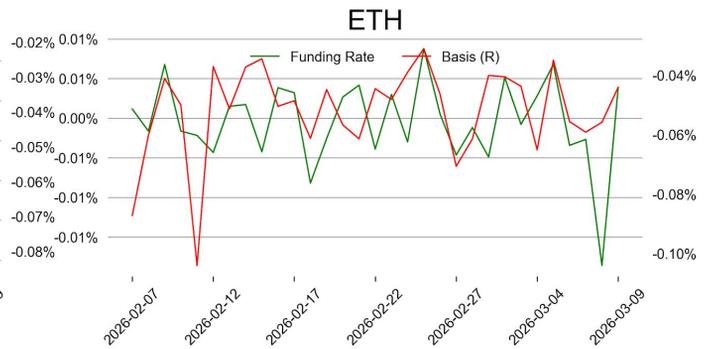
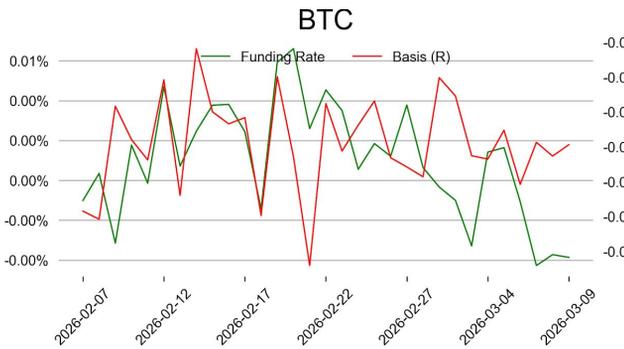
### Open Interest / Market Cap



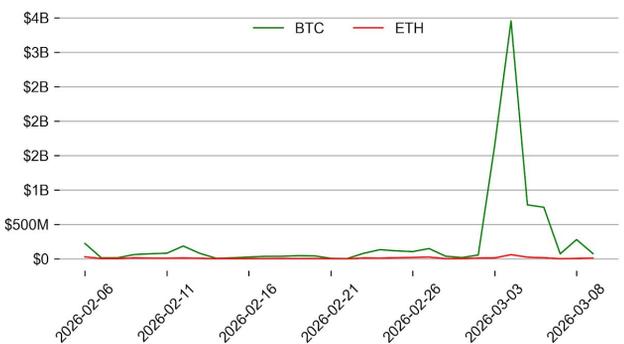
### Futures O.I. & Liquidations



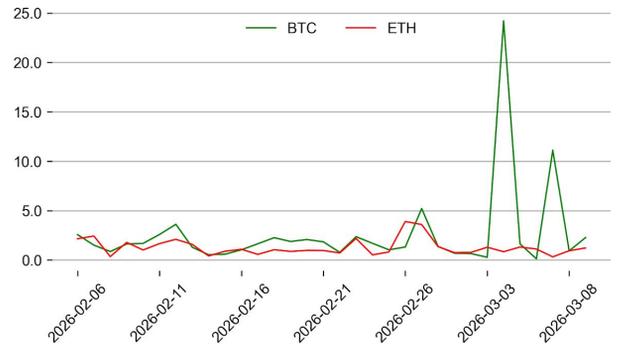
### Perps Funding Rate & Rolling Basis



### Option Volume



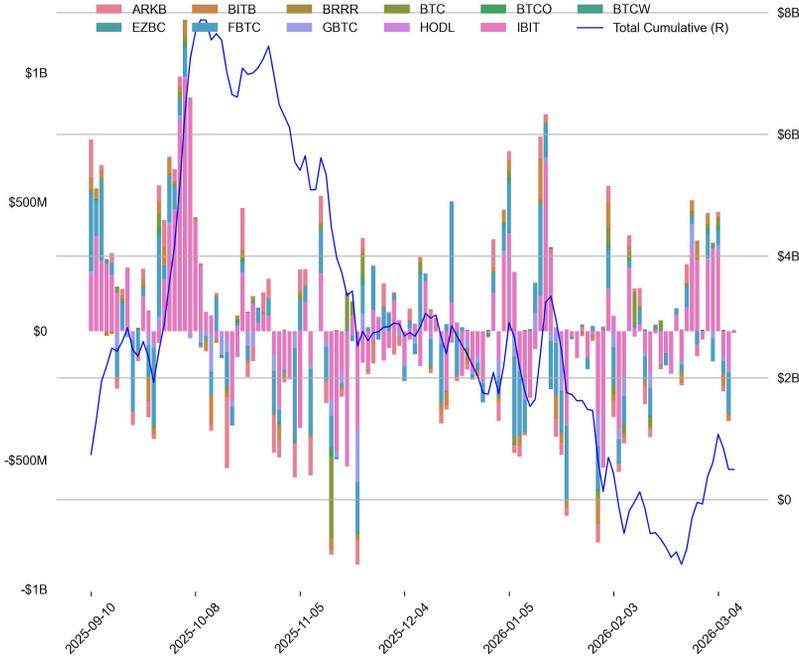
### Put Call Ratio



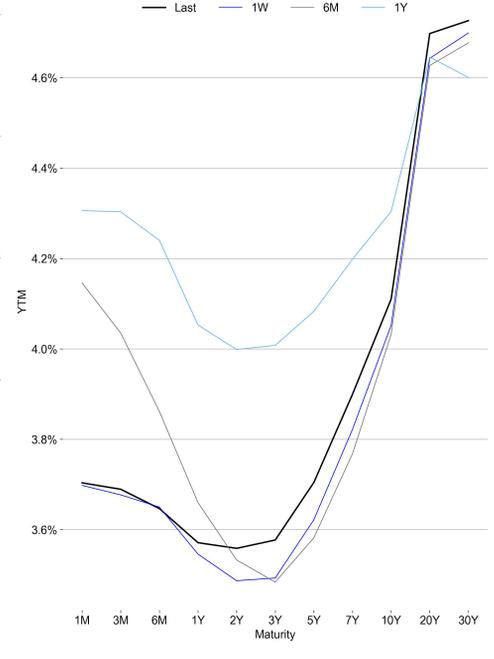
# TRADFI

	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	6795.90	22695.95	5688.95	25408.46	4615.46	0.8609	157.88	6.9073	98.87	88.69	5149.66	199.72	138.95	8.66	14.70
1D	0.8%	1.4%	-0.5%	-1.4%	-1.0%	-0.8%	-0.3%	0.1%	-0.7%	-17.9%	1.3%	1.3%	4.1%	8.1%	3.7%
1M	-2.0%	-1.5%	-5.2%	-4.3%	-0.6%	1.7%	0.4%	-0.5%	1.3%	39.6%	3.4%	21.0%	3.0%	5.1%	1.7%
1Y	17.8%	24.7%	4.0%	4.9%	17.0%	-6.7%	6.7%	-4.5%	-4.8%	32.3%	76.7%	-8.2%	-51.6%	-45.9%	75.6%

## BTC Spot ETF Flow

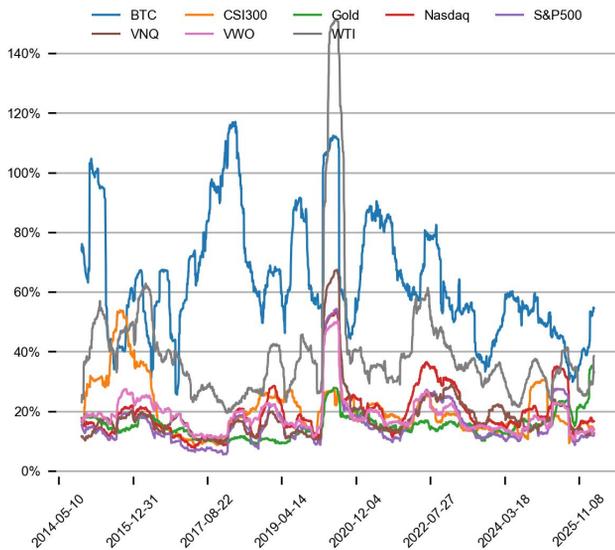


## US Treasury Yield Curve

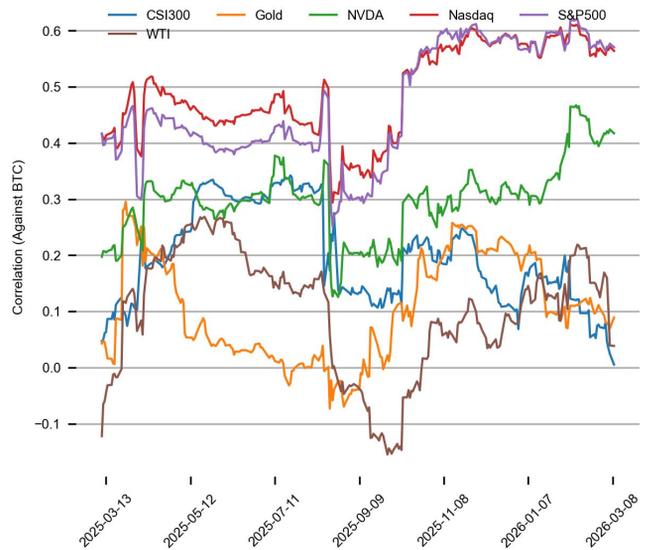


## CROSS ASSET METRICS

### Volatility



### Correlation



## STABLECOIN

Supply Change				USDT Prem/Disc
	Market Cap (\$mn)	Share	7D Change	
USDT_Trone	85,306	27.2%	+0.7%	
USDT_Ethereum	78,498	25.1%	-0.4%	
USDT_Omni	80	0.0%	0.0%	
USDC	78,235	25.0%	+4.0%	
DAI	4,507	1.4%	+1.8%	
FDUSD	374	0.1%	-1.9%	
Others	66,353	21.2%	+2.6%	
Total	313,353	100.0%	+1.6%	

## 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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## Authors

**Peter Chung**, Head of Research [X](#), [Telegram](#), [LinkedIn](#)

**Min Jung**, Research Associate [X](#), [Telegram](#), [LinkedIn](#)

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