


Support / Potential "buy" levels
\$8,877
Resistance
\$9,019
KEY TAKEAWAYS
Aussie Stocks Retreat as Dollar and Bonds Respond to Trade News

Australian stocks closed lower on Monday, with the ASX 200 falling 0.84% as IT, Financials, and Healthcare shares dragged the market down. Leading gains included Regis Resources Ltd (ASX:RRL) up 7.21% to 6.10, Genesis Minerals Ltd (ASX:GMD) +4.27% to 6.10, and Emerald Resources NL (ASX:EMR) +3.39% to 5.19. The worst performers were Treasury Wine Estates Ltd (ASX:TWE) down 14.11% to 5.99, Hub24 Ltd (ASX:HUB) -5.54% to 99.25, and Pinnacle Investment Management Group Ltd (ASX:PNI) -5.39% to 18.09. Decliners outnumbered advancers 786 to 431, with 356 unchanged. The S&P/ASX 200 VIX surged 16.14% to 12.45.

Australia is considering a AUD 1.2 billion critical minerals reserve ahead of Prime Minister Albanese's October 20 meeting with President Trump. The Australian dollar rebounded to \$0.653, while 10-year bond yields fell toward 4.30%. In Asia, the Shanghai Composite fell 1% and Shenzhen 2.3%, with tech and new energy shares leading declines. WTI crude rose over 1% to US\$59.8, and gold reached US\$4,070 per ounce amid trade tensions and geopolitical risks.

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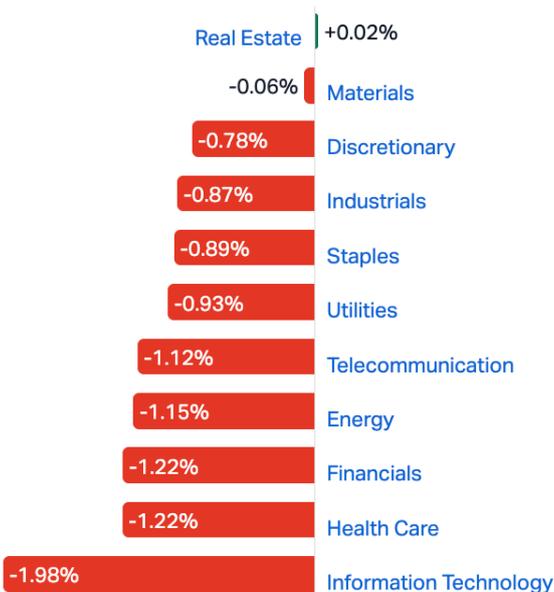
MARKET MOVERS

Australia stocks closed lower on Monday, with losses in IT, Financials, and Healthcare sectors dragging the market down. The ASX 200 fell 0.84% in Sydney trading.



Among the gainers, Regis Resources Ltd (ASX:RRL) advanced 7.21% to 6.10, Genesis Minerals Ltd (ASX:GMD) added 4.27% to 6.10, and Emerald Resources NL (ASX:EMR) rose 3.39% to 5.19. On the downside, Treasury Wine Estates Ltd (ASX:TWE) plunged 14.11% to 5.99, marking a five-year low, while Hub24 Ltd (ASX:HUB) lost 5.54% to 99.25 and Pinnacle Investment Management Group Ltd (ASX:PNI) declined 5.39% to 18.09. Decliners outnumbered advancers 786 to 431, with 356 unchanged. The S&P/ASX 200 VIX, reflecting implied volatility, jumped 16.14% to 12.45, a three-month high.

↓ 10 Sectors Down ↑ 1 Sector Up



Policy developments added a macroeconomic layer of uncertainty. Australia is weighing mandated floor prices for critical minerals and funding for rare earth projects under a proposed US resources pact, aimed for completion ahead of Prime Minister Anthony Albanese's October 20 summit

with President Donald Trump. Talks with miners envisage a AUD 1.2 billion "critical minerals strategic reserve," with potential equity sales to allies, including the UK, underscoring Western efforts to reduce dependence on China for rare earths.

The Australian dollar rebounded to \$0.653 following easing trade tensions.



| Crosses | Price | | Day | Year | Date | |
|---------|---------|---|---------|--------|--------|--------|
| AUDUSD | 0.65252 | ▲ | 0.00511 | 0.79% | -2.96% | 13:34 |
| EURAUD | 1.7816 | ▼ | -0.0129 | -0.72% | 9.84% | Oct/13 |
| GBPAUD | 2.0480 | ▼ | -0.0162 | -0.79% | 5.45% | Oct/13 |
| AUDNZD | 1.1368 | ▲ | 0.0067 | 0.59% | 2.95% | Oct/13 |
| AUDJPY | 99.0560 | ▲ | 1.1800 | 1.21% | -1.62% | Oct/13 |
| AUDCNY | 4.6563 | ▲ | 0.0290 | 0.63% | -2.37% | Oct/13 |
| AUDCHF | 0.5222 | ▲ | 0.0045 | 0.86% | -9.95% | Oct/13 |
| AUDCAD | 0.9129 | ▲ | 0.0063 | 0.69% | -1.64% | Oct/13 |

Trump's comments on Truth Social, suggesting that US-China trade ties "will all be fine," followed his earlier threat of 100% tariffs and software restrictions from November 1. Domestically, markets focused on the upcoming RBA meeting minutes, central bank speeches, and key labor data. Governor Michele Bullock's recent remarks stressed persistent inflation concerns, a data-dependent policy stance, and a roughly 52% market-implied chance of a 25bps rate cut in November. Ten-year government bond yields retreated toward 4.30% from last week's five-week high, as investors sought safety amid ongoing trade uncertainty.

In Asia, the Shanghai Composite fell 1% to 3,860 and the Shenzhen Component dropped 2.3% to 13,050, extending prior session losses after Trump's tariff threats.

Technology and new energy shares led declines, with Luxshare Precision, Eoptolink Technology, Zhongji Innolight, Contemporary Amperex, and Sungrow Power down between 2.4% and 5.4%. Traders awaited September trade data for signs of the trade war's economic impact.



| Indexes | Price | Day | Month | Year | Date |
|-------------|-----------|---------------------|--------|--------|--------|
| HK50 | 25,684.00 | ▼ -606.32 -2.31% | -2.88% | 21.77% | Oct/13 |
| SHANGHAI | 3895 | ▼ 2 -0.06% | 0.73% | 18.40% | 13:35 |
| CSI 300 | 4,587.23 | ▼ -29.60 -0.64% | 1.20% | 15.80% | Oct/13 |
| SHANGHAI 50 | 2,964.37 | ▼ -10.48 -0.35% | 0.06% | 8.86% | Oct/13 |
| CH50 | 14,811.30 | ▼ -173.76 -1.16% | -2.39% | 7.32% | Oct/13 |

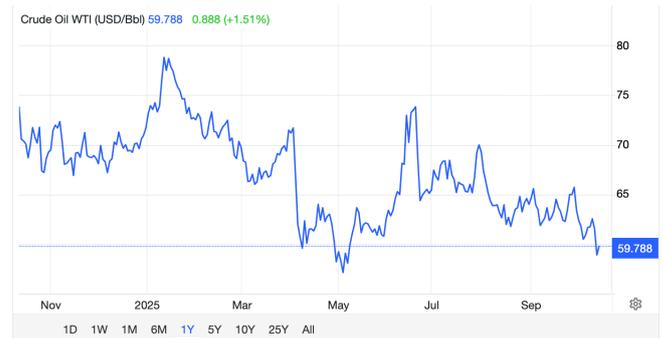
US stock futures gained as Trump softened his stance on China, indicating readiness to negotiate if Beijing is “willing to be reasonable,” echoing Vice President JD Vance.



| Indexes | Price | Day | Month | Year | Date |
|---------|----------|--------------------|--------|--------|--------|
| US30 | 45887 | ▲ 408 0.90% | -0.04% | 6.51% | 13:35 |
| US400 | 3,161.88 | ▼ -92.28 -2.84% | -4.73% | 0.26% | Oct/10 |
| US2000 | 2,394.59 | ▼ -74.26 -3.01% | -1.11% | 7.17% | Oct/10 |
| US500 | 6641.42 | ▲ 88.91 1.36% | 0.37% | 13.30% | 13:35 |
| US100 | 24648 | ▲ 426 1.76% | 1.41% | 20.53% | 13:35 |
| USVIX | 21.66 | ▲ 5.23 5.23% | 6.95% | 1.20% | Oct/10 |

Last Friday’s sharp selloff had pushed the Dow down 1.9%, the S&P 500 2.71%, and the Nasdaq 3.56%, led by losses in Nvidia, AMD, and Tesla ranging from 4.9% to 7.7%. Investors now anticipate major bank earnings from Citigroup, Goldman Sachs, Wells Fargo, JPMorgan Chase, Bank of America, and Morgan Stanley.

Energy markets mirrored these shifts. WTI crude rebounded over 1% to US\$59.8 per barrel, recovering from a five-month low amid easing US-China trade fears.



| | Price | Day | Month | Year | Date |
|-------------|--------|---------------------|---------|---------|--------|
| Crude Oil | 59.788 | ▲ 0.888 1.51% | -5.67% | -19.12% | 13:35 |
| Brent | 63.636 | ▲ 0.906 1.44% | -5.77% | -17.96% | 13:35 |
| Natural gas | 3.1184 | ▲ 0.0124 0.40% | 2.32% | 24.84% | 13:35 |
| Gasoline | 1.8429 | ▲ 0.0349 1.93% | -8.58% | -10.66% | 13:35 |
| Heating Oil | 2.2356 | ▲ 0.0312 1.42% | -4.23% | 0.53% | 13:35 |
| Coal | 104.55 | ▲ 0.05 0.05% | 3.62% | -30.02% | Oct/10 |
| Ethanol | 1.69 | ▼ -0.0550 -3.16% | -13.37% | 8.71% | Oct/10 |
| Urals Oil | 58.89 | ▼ -1.92 -3.16% | -3.43% | -19.77% | Oct/10 |

Trump also announced the end of the Gaza conflict “en route” to the Middle East for a ceasefire summit.

Gold climbed to an all-time high of US\$4,070 per ounce, driven by geopolitical risk and trade-related uncertainty, as a continuing US government shutdown deprived markets of critical economic data. The Fed is widely expected to deliver additional 25bps cuts at upcoming meetings this year.



Overall, the Australian market’s retreat on Monday reflected both sector-specific losses and broader geopolitical and macroeconomic uncertainties, while domestic policy measures, trade developments, and central bank guidance will remain in sharp focus for investors in the coming weeks.

Regards,
Mark Elzayed
Investor Pulse

MARKET DATA
ASX Top 20

| | | | |
|---|------------------------|--|------------------------|
|  CBA^D Commonwealth Bank | 165.19 -3.15 -1.87% |  WOW^D Woolworths | 25.99 -0.10 -0.38% |
|  BHP^D BHP | 41.89 -0.33 -0.78% |  TLS^D Telstra | 4.83 -0.02 -0.41% |
|  CSL^D CSL | 208.75 -0.45 -0.22% |  GMG^D Goodman Group | 33.25 +0.03 +0.09% |
|  WBC^D Westpac Bank | 38.84 -0.37 -0.94% |  TCL^D Transurban | 14.32 +0.22 +1.56% |
|  NAB^D National Australia Bank | 43.21 -0.81 -1.84% |  SQ2 Block Inc | |
|  ANZ^D ANZ | 36.01 +1.15 +3.30% |  ALL^D Aristocrat Leisure | 66.40 -1.72 -2.52% |
|  FMG^D Fortescue Metals | 19.09 -0.07 -0.37% |  NCM Newcrest Mining | |
|  WES^D Wesfarmers | 89.01 -0.03 -0.03% |  REA^D REA Group | 219.42 -3.53 -1.58% |
|  MQG^D Macquarie Group | 212.13 -8.87 -4.01% |  WDS^D Woodside Energy | 22.27 -0.28 -1.24% |
|  RIO^D Rio Tinto | 125.21 +0.06 +0.05% |  XRO^D Xero | 153.81 -2.34 -1.50% |

Commodities & Forex

| | | | |
|--|--|---|-----------------------------|
|  TIO1! IRON ORE | |  AUDUSD Australian Dollar / U.S. Dollar | 0.65258 +0.80% +0.01 |
|  GC1! GOLD | |  AUDGBP AUSTRALIAN DOLLAR / BRITISH POUND | 0.4877 +0.72% +0.0035 |
|  SI1! SILVER | |  AUDEUR AUSTRALIAN DOLLAR / EURO | 0.5610 +0.68% +0.0038 |
|  HG1! COPPER | |  AUDNZD Australian Dollar / New Zealand Dollar | 1.13690 +0.51% +0.01 |
|  ZW1! WHEAT | |  AUDJPY Australian Dollar / Japanese Yen | 99.072 +1.19% +1.17 |
|  CL1! CRUDE OIL | |  AUDCNY AUSTRALIAN DOLLAR / CHINESE YUAN | 4.6493 +0.66% +0.0304 |
|  NG1! NATURAL GAS | |  AUDTHB AUSTRALIAN DOLLAR / THAI BAHT | 21.207 +0.29% +0.062 |
|  NCF1! COAL | |  AUDIDR AUSTRALIAN DOLLAR / INDONESIAN ... | 10,805.3 +0.62% +66.7 |
|  LTH1! LITHIUM | | | |

Economic Calendar

| | | Actual | Forecast | Prior |
|---|---|---|----------|------------------|
|  | | | | |
| October 14 | | | | |
| 13:00 |  |  | | 17.4K Person |
| | | | | |
| | |  | | 4.7% |
| October 15 | | | | |
| 08:30 |  |  | 0.2% | 0% |
| | |  | -0.1% | -0.4% |
| | |  | -2.3% | -2.9% |
| October 16 | | | | |
| 07:30 |  |  | | 4.2% |
| 19:30 |  |  | | |
| | |  | 0.4% | 0.6% |
| October 17 | | | | |
| 16:00 |  |  | 0.1% | 0.1% |
| | |  | | 2% |
| 19:30 |  |  | | 1.312M Number of |
| October 20 | | | | |
| 04:45 |  |  | | 0.5% |