

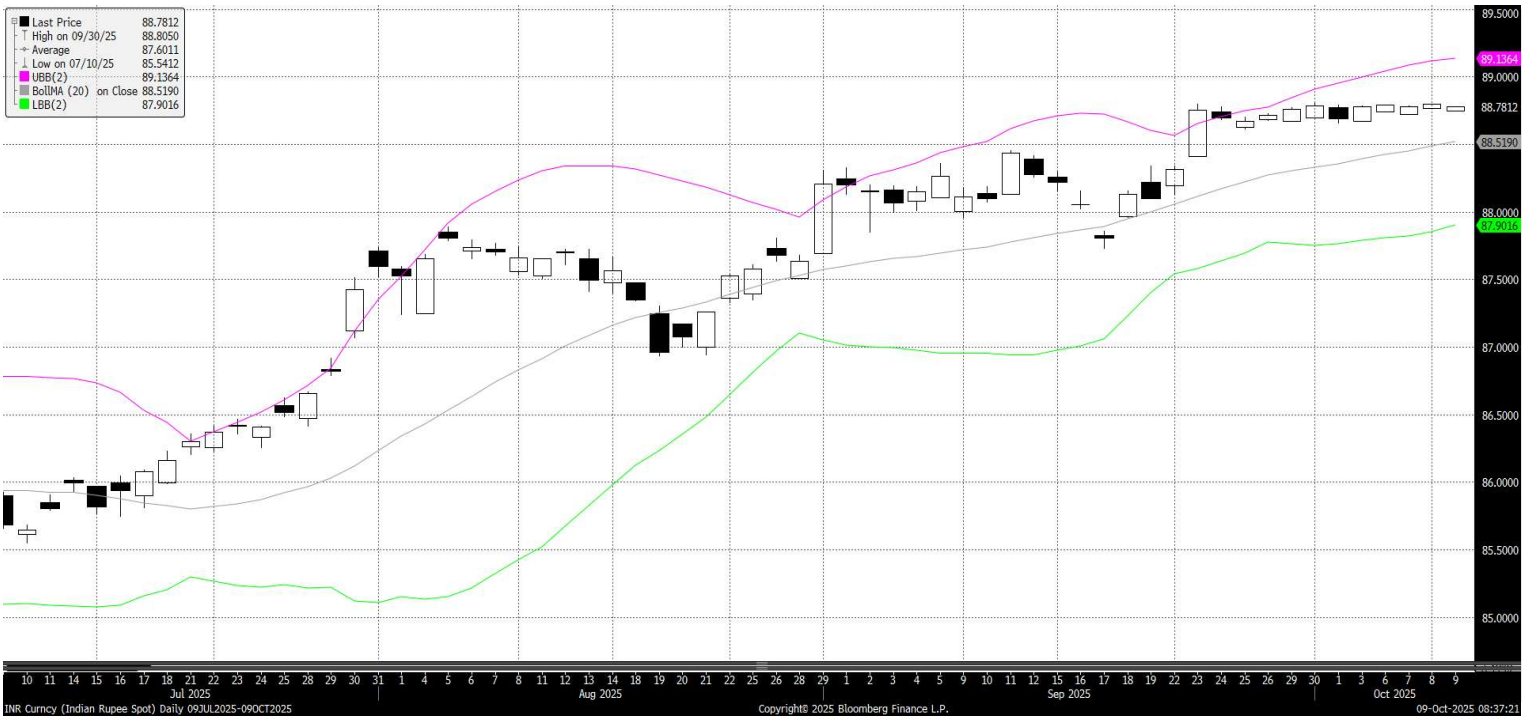
Bank Dhofar Morning Market Update



Date: 09/10/25

Global Update

Asian shares rose for the first time in three days as a renewed wave of buying in companies linked to artificial intelligence lifted equities in Japan. Gold and oil edged lower after a peace deal in the Middle East. MSCI’s regional stock gauge rose 0.3% with tech firms such as SoftBank Group Corp. among the winners. The Nikkei index extended its recent run of gains while Hong Kong fluctuated, with HSBC Holdings Plc falling after plans to take Hang Seng Bank Ltd. private. Shares in mainland China jumped 1.6% as markets reopened after the Golden Week break. Gold fell, but still traded above \$4,000, as traders took some profit after a scorching rally and on reduced demand for haven assets. Gains in Asian stocks followed US benchmarks closing at yet another record as traders looked past worries of a potential bubble in high-profile tech names and instead focused on corporate resilience and the restart of Federal Reserve interest-rate cuts. The optimism that’s powered equities since their April slump now faces a key test as earnings season begins. The Indian Rupee (INR) opens on a flat note again around 88.90 against the US Dollar (USD) on Wednesday. The USD/INR pair has been trading in a confined range of 20 paise for almost two weeks between 88.79 and the all-time high of 89.12, with investors seeking fresh cues on when India and the United States (US) will reach a trade agreement. A report from Reuters has stated that the Reserve Bank of India (RBI) has been intervening regularly in the non-deliverable forward market and the local spot market through state-run banks to support the Indian Rupee against the US Dollar. The Indian currency has been under immense pressure as the US is charging 50% tariffs on imports from India. Washington raised duties on imports from New Delhi by 25% for buying Oil from Russia.



Source: Reuters, Bloomberg

Currencies				Rates		
	Open	High	Low		Last Price	Previous Day Close
EURUSD	1.1629	1.1648	1.1624	O/N SOFR	4.140	4.140
GBPUSD	1.3404	1.3419	1.3397	1 month SOFR	4.084	4.084
USDJPY	152.69	152.7600	152.41	3 month SOFR	3.935	3.935
USDINR	88.75	88.78	88.75	6 months SOFR	3.797	3.797
USDCNY	7.1295	7.1343	7.1253	12 month SOFR	3.601	3.601
USDCHF	0.8019	0.8020	0.8003	3 years IRS	3.319	3.322
AUDUSD	0.6586	0.6606	0.6581	5 years IRS	3.367	3.369
NZDUSD	0.5787	0.5805	0.5782	S&P 500 futures were little changed as of 12:45 p.m. Tokyo time.		

The Bloomberg Dollar Spot Index fell 0.2%. The euro rose 0.2% to \$1.1646. The Japanese yen rose 0.1% to 152.50 per dollar. The offshore yuan rose 0.3% to 7.1296 per dollar. Bitcoin fell 0.7% to \$122,018.51. Ether fell 1.3% to \$4,444.98. West Texas Intermediate crude fell 0.6% to \$62.15 a barrel. Spot gold fell 0.3% to \$4,028.80 an ounce.

Japan’s Topix rose 0.3%. Australia’s S&P/ASX 200 rose 0.1%. Hong Kong’s Hang Seng was little changed. The Shanghai Composite rose 1.2%. Euro Stoxx 50 futures fell 0.2%. The yield on 10-year Treasuries was little changed at 4.12%. Japan’s 10-year yield declined one basis point to 1.685%. Australia’s 10-year yield declined four basis points to 4.32%

				Global Markets			
			Current Levels		Level	1-Day Change (%)	YTD (%)
CBO Repo Rate			4.75				
O/N OMIBOR			4	S&P 500	6754	0.583	14.83
*Bank Deposit Rates for 1 years			4.00	Euro Stoxx 600	574	0.794	13.04
				ShanghaiComposite Index	3931	1.244	17.28
Bank Deposit Rates for 5 years			4.00	MSX-30	5196	0.275	13.53
*Amount>500k OMR				NIFTY-50	25037	-0.036	5.89
Calendar				Brent Crude (\$/bbl)	65.94	-0.468	-8.17
Key Data Watch	Time (GST)	Expected	Prior	Gold (\$/oz.)	4038	-0.095	53.87
Initial Jobless Claims (US)	16:30	233k	231k	DXY	99	-0.186	-8.99
Machine Tool Orders YoY (JPN)	10:00	--	8.1%	Silver(\$/oz.)	49	0.215	69.51

For any Treasury related requirement, please contact:
Telephone: +968 2265 2721/2722/2731/2716

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