

## Nasdaq 100 Daily Update Tuesday 25th February 2025

### Nasdaq 100 Fundamental Analysis:

**The Nasdaq 100 has moved lower again to start this week.** Extending the sell off that began on Friday to 3.5%. After opening at 21,700 and initially rallying to print an early Monday high of 21,811, prices reversed course at the start of the afternoon and continued the move lower across the rest of the session, as traders reduced exposure to some key Magnificent Seven stocks. Prices eventually traded to a low of 21,366 on Tuesday morning before some buyers appeared.



**Looking forward**, there are two events that are likely to influence prices of the Nasdaq 100 into the weekend. The first, is the **earnings release of Nvidia, which is due after the market close on Wednesday**. This earnings update is the first from the company since the emergence of DeepSeek as a potential disruptor in the AI space and will provide insight into the strength of demand for US artificial intelligence, as well as the market leadership of Magnificent Seven stocks in general. While traders will be keen to judge these earnings against expectations, they will also want to know what future AI revenue potential looks like. Then, on **Friday, the US PCE Index, which is the Fed's preferred inflation gauge, is released at 1330 GMT**. Traders are very sensitive to the direction of US inflation, so any print above expectations could negatively impact the direction of the Nasdaq 100 into the weekend.

### Nasdaq 100 Technical Analysis:



#### Daily Analysis:

The latest price weakness has broken below support levels represented by the mid-average (21813) and 21418, which was the February 10th low. This exposes risks for a deeper sell-off to 20953 (Feb 3rd low), and if this gives way towards 20694 (Jan 13th extreme).

To the upside, breaks above 21813 (Bollinger mid-average) are needed to open retests of the 22318/22449 resistance area (Feb 18th and Dec 16th highs).



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