

UK 100 Daily Update Tuesday 25th March 2025

UK 100 Fundamental Analysis:

The UK 100 has fallen to start this week as traders rotate back into US indices on hopes that President Trump's plans for reciprocal tariffs won't be as negative for the US economy as feared. After opening on Monday at 8,677, the UK 100 briefly traded to a high of 8,703 before prices reversed course to the downside. That move continued this morning to print a low at 8,614 from which fresh buying interest has been found again.



Looking forward, it is likely to be a busy week for UK 100 traders, with quarter end portfolio rebalancing balancing flows and tomorrow's Spring Economic Statement (1230 GMT) from the UK Chancellor to consider. News or social media posts from President Trump providing further clarity on the scope of reciprocal tariffs that are due to be imposed on US trading partners from April 2nd could also have a major impact on sentiment.

UK economic data is likely to be relevant. The latest UK inflation (CPI) update is due out tomorrow at 0700 GMT and could influence the Bank of England's ability to deliver an interest rate cut at its next meeting in April. Then, on Friday at 0700 GMT, UK Retail Sales are released. This will provide traders with an insight into consumer spending, which is so important if the UK economy is going to have any chance of emerging from its recent slump.

UK 100 Technical Analysis:



Daily Analysis:

Last week's upside move in the UK 100 index has been held and reversed by resistance at 8738 which is the 62% retracement of March's declines. The focus for traders will now be on support at 8613 (half latest upside). Closing breaks below this level can see further declines towards 8467 (mid-point Dec/Mar strength).

To the upside, breaks above 8738 are needed to open scope for tests of resistance at 8896 (Mar 3rd high).

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