

MARKET UPDATE

16/02/2026

Asia stocks muted in holiday-thinned trade.

Most Asian stocks kept to a tight range on Monday as a market holiday in China kept trading volumes dull, while Japanese shares retreated on dismal fourth quarter economic growth data.

South Korean and Taiwanese markets were also closed for the day.

Regional markets took a weak lead-in from Wall Street, as a muted consumer inflation reading for January did little to clear uncertainty over interest rates. U.S. markets are also closed on Monday for a holiday.

Japanese shares dip on weak Q4 GDP

Japan's Nikkei 225 index shed 0.2%, while the TOPIX index fell 0.8% after gross domestic product data showed growth missed expectations by a wide margin in the fourth quarter.

Japanese GDP grew 0.2% year-on-year in Q4, much lower than forecasts of 1.6%. The print also showed little improvement in growth after a sharp contraction in the third quarter.

The weak print was driven chiefly by weak business spending, sluggish export demand, and tepid private consumption. Late-2025 stimulus measures from Tokyo did little to support growth.

Oil steady as traders brace for U.S.–Iran talks.

Oil traded little changed on Monday, with investors weighing the market implications of upcoming U.S.-Iran talks aimed at de-escalating tensions against a backdrop of expected OPEC+ supply increases.

Brent crude futures edged up 3 cents to \$67.78 a barrel by 0358 GMT.

U.S. West Texas Intermediate crude was at \$62.91 a barrel, up 2 cents. There will be no WTI settlement on Monday due to a U.S. holiday.

Last week, both benchmarks posted weekly declines with Brent settling down about 0.5% and WTI losing 1% after comments from U.S. President Donald Trump that Washington could make a deal with Tehran over the next month drove down prices on Thursday.

The two countries are due to hold a second round of talks in Geneva on Tuesday after renewing negotiations earlier this month aimed at tackling their decades-long dispute over Tehran's nuclear programme and averting a new military confrontation.

Gold prices dip below \$5k/oz, silver slides.

Gold prices fell below key levels in Asian trade on Monday, while silver fell sharply amid continued uncertainty over U.S. interest rates, especially following mixed consumer inflation data.

Metal markets remained volatile after logging wild swings in the past two weeks, with gold and silver also remaining well below late-January peaks.

Spot gold fell 1.2% to \$4,982.10/oz, while gold futures for April fell 0.9% to \$5,001.76/oz by 00:09 ET (05:09 GMT).

Spot silver was the biggest decliner in precious metals, tumbling nearly 3% to \$75.4505/oz, while spot platinum fell 1% to \$2,047.25/oz.

Trading volumes were thin with Chinese, South Korean, and U.S. markets closed for the day.

The dollar steadied in Asian trade as markets parsed the outlook for U.S. interest rates following mixed consumer price index inflation data for January, released on Friday.

The print showed a mild decline in headline CPI, while core CPI was in line with expectations.

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