DIGITAL HEIR

THE LEDGER

DIGITAL ASSET INTELLIGENCE

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ISSUE 003

5 AUGUST 2026

TODAY'S READ

Crypto is modestly firmer over 24 hours, but the market remains below Issue 002 levels and sentiment has slipped into Extreme Fear.

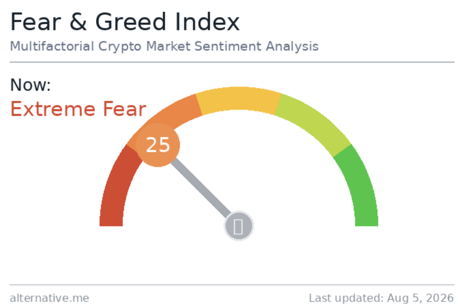
Market Dashboard

ALL PRICES AND VALUES IN USD. The change column compares this 5 August snapshot with Issue 002 on 31 July; rolling 24-hour moves appear in context.

MARKET	CURRENT	SINCE ISSUE 002	CONTEXT
Bitcoin	**$63,994**	**-$744 / -1.1%**	Rolling 24h: +0.8% | Volume: $23.1B
Ethereum	**$1,866**	**-$52 / -2.7%**	Rolling 24h: +0.6% | Seven-day: +2.1%
Solana	**$73.60**	**-$0.92 / -1.2%**	Rolling 24h: +0.4% | Seven-day: +0.6%
XRP	**$1.07**	**-$0.01 / -0.9%**	Rolling 24h: +0.1% | Seven-day: +1.1%
Global market	**$2.28T**	**-$0.03T / -1.5%**	Rolling 24h: +0.8% | Volume: $51.7B
BTC dominance	**56.4%**	**Unchanged**	ETH dominance: 9.9% (-0.2 points)

Dashboard source: CoinGecko

Market Overview



Current reading: **25 - EXTREME FEAR** | *Down 4 points from Issue 002* | *Updated 5 August 2026*

Crypto is positive over the latest rolling 24-hour window, but it remains softer than at the last publication. Bitcoin is near $63,994, down $744 or 1.1% from Issue 002, while Ethereum has fallen $52 to $1,866. Solana and XRP are also slightly below their 31 July snapshots. Total market value is about $2.28 trillion, roughly $34 billion lower than the prior issue, and rolling 24-hour turnover is $51.7 billion versus $58.0 billion previously. The daily picture is therefore mixed: prices have edged higher today, but the multi-day comparison still shows less capital and weaker sentiment. With the Fear & Greed Index down four points to 25, patience remains sensible until Bitcoin can close above daily resistance and improving participation persists.

WHY THIS MATTERS

A green 24-hour reading does not erase the decline since Issue 002. The stronger signal would be a daily close through resistance accompanied by rising volume and broad, completed ETF inflows.

Global Markets

Record US equities and lower oil improved the risk backdrop, while employment and services data remain the next test for rates.

Equities - US indexes closed at records as risk appetite improved. The S&P 500 rose 1.79% to 7,736.52, the Nasdaq gained 2.59% to 26,584.99 and the Dow advanced 1.71% to 54,085.88. Strong corporate forecasts and renewed optimism around AI lifted growth shares. That is supportive for crypto because technology equities and digital assets often compete for the same risk-seeking capital, although crypto's smaller move shows the benefit has not transferred evenly.

Oil and inflation - crude fell sharply on hopes of progress with Iran. Brent settled at $79.36 and WTI at $75.77, both down more than 5% on the session. Lower energy prices can reduce future inflation pressure and, in turn, reduce the need for tighter monetary policy. That is generally constructive for crypto, but the move remains sensitive to negotiations and shipping through the Strait of Hormuz.

Gold and the dollar - defensive demand has not disappeared. Spot gold rose about 1% to $4,086.36 while the dollar and Treasury yields eased. A softer dollar normally helps dollar-priced crypto assets, but gold's strength shows investors are still retaining protection against geopolitical and inflation risk. The combination is more balanced than a pure risk-on signal.

Macro focus - labour and services data now control the next rate move. ADP private payrolls, final services PMI and ISM Services are due tonight in Sydney time, followed by productivity data and Friday's US jobs report. Softer-than-forecast readings can help crypto if they lower rate expectations without triggering recession fears; stronger readings can support the dollar and pressure rate-sensitive assets.

The Headlines

Five developments shaping the day - and why they matter.

1. Crypto is green today, but still below Issue 002. Bitcoin, Ethereum, Solana and XRP are all slightly positive over the latest rolling 24-hour window. Against the 31 July publication snapshot, however, they remain lower by approximately 1.1%, 2.7%, 1.2% and 0.9% respectively. The rolling comparison prevents a one-day rebound from being mistaken for a full recovery.

2. Participation is lower than at the last publication. CoinGecko's aggregate rolling 24-hour market volume is about $51.7 billion, down $6.3 billion or 10.9% from Issue 002's $58.0 billion snapshot. Bitcoin alone accounts for roughly $23.1 billion. This comparison is separate from exchange-specific daily candles, which can show a different direction because their cut-off times and venues differ.

3. Bitcoin ETF flows improved, but remain net negative since Issue 002. Aggregate US spot Bitcoin ETFs lost $265.4 million on 31 July, gained $170.1 million on 3 August and had at least $21.6 million of inflows reported for 4 August. Across those sessions the category remains $73.7 million net withdrawn. The latest session is provisional because several issuers had not yet reported.

4. Ethereum's weekly strength has not translated into broad ETF demand. Ethereum is up about 2.1% over seven days, but it is down 2.7% from the Issue 002 snapshot. Aggregate ETF flows across 31 July, 3 August and the provisional 4 August session total about $1.6 million withdrawn. That is close to flat, but it does not yet confirm a decisive institutional rotation into ETH.

5. Security and geopolitical risk remain live market variables. A reported Coldcard software flaw has been linked to thefts from more than 1,000 wallets, while oil and broader risk assets continue to react to US-Iran negotiations. Security incidents can pressure confidence within crypto even when macro markets improve, and geopolitical reversals can quickly restore inflation and volatility risk.

Institutional ETF Flow

AGGREGATE FLOW SINCE ISSUE 002 - 31 JULY TO 4 AUGUST US SESSIONS

Bitcoin ETFs: $73.7M withdrawn* | Ethereum ETFs: $1.6M withdrawn* | Solana ETFs: $0 net flow* | XRP ETFs: aggregate period flow not independently verified | HYPE ETFs: $2.8M withdrawn.

Every figure combines all funds reported within its category; no single issuer is presented as the whole market. Bitcoin's $170.1 million inflow on 3 August and at least $21.6 million on 4 August did not fully offset the $265.4 million withdrawn on 31 July, leaving $73.7 million net withdrawn since Issue 002. Ethereum is close to flat at $1.6 million withdrawn, Solana recorded no net flow and HYPE lost $2.8 million. The 4 August BTC and ETH figures remain provisional because several issuer cells were unreported; XRP is labelled unavailable rather than estimated.

Approved Crypto ETF Landscape

Aggregate U.S. single-asset ETF-category flows across the sessions since Issue 002. An asterisk means 4 August reporting was incomplete at publication.

ASSET	EXPOSURE	PERIOD	NET SINCE ISSUE 002	WHY IT MATTERS
BTC	Spot Bitcoin	31 Jul-4 Aug	$73.7M withdrawn*	The $265.4M outflow on 31 Jul exceeded the next two sessions' reported inflows.
ETH	Spot Ethereum	31 Jul-4 Aug	$1.6M withdrawn*	The category was close to flat: +$9.0M, -$11.9M and at least +$1.3M.
SOL	Spot / staking	31 Jul-4 Aug	$0 net flow*	No aggregate net movement was reported across the three sessions.
XRP	Spot XRP	Period total	Not verified	A reliable all-fund aggregate for the same period was not independently available.
HYPE	Emerging ETF	31 Jul-4 Aug	$2.8M withdrawn	The emerging category lost $1.8M on 31 Jul and $1.0M on 3 Aug.

ETF summary. Flows improved after the 31 July sell-off, but the rolling period remains negative for Bitcoin and slightly negative for Ethereum. Solana was flat and HYPE recorded withdrawals. The evidence does not yet show a broad institutional risk-on rotation; completed 4 August submissions are needed before the latest rebound can be treated as final.

Market Structure

Levels are observation zones, not recommendations.

ASSET	STATE	SUPPORT	RESISTANCE	WHAT CHANGES THE VIEW
BTC	Below resistance	$62,500	$65,500	A daily close above $65,500 would strengthen the recovery. Losing $62,500 would expose the wider $60,100 support again.
ETH	Range-bound	$1,800	$2,000	A daily close above $2,000 would restore stronger momentum. Losing $1,800 would return control to sellers.
SOL	Range-bound	$70	$80	A daily close above $80 would improve the recovery. Losing $70 would refocus attention on $63.
XRP	Range-bound	$1.00	$1.15	A daily close above $1.15 would improve structure. Losing $1.00 would confirm a significant bearish breakdown.

Assets on Watch

Bitcoin - $65,500 remains the daily test. BTC is near $63,994 and has not yet reclaimed the same $65,500 resistance used in Issue 002. A daily close above it would improve structure; a loss of $62,500 would shift attention back toward $60,100.

Ethereum - weekly relative strength meets a clear ceiling. ETH is up about 2.1% over seven days but is $52 below the prior issue. The daily structure remains between $1,800 support and the whole-number $2,000 resistance.

Solana - holding above $70, but still capped at $80. SOL is near $73.60. A daily close above $80 would signal a stronger recovery, while a loss of $70 would weaken the short-term base and bring $63 back into view.

XRP - the range remains compressed. XRP is near $1.07 and little changed from Issue 002. The daily map remains simple: $1.00 support and $1.15 resistance, with a close outside either level needed to change the range-bound view.

Risk Calendar

Sydney time (AEST). Confirm event times with your own calendar before acting.

DATE	AEST	EVENT	IMPACT	POSSIBLE MARKET EFFECT
Wed 5 Aug	10:15pm	US ADP private payrolls	High	Less than forecast: generally good for crypto and bad for the dollar if rate expectations fall. More than forecast: generally good for the dollar and may pressure crypto.
Wed 5 Aug	10:45pm	US services PMI - final	Medium	Less than forecast: can help crypto if it lowers rate pressure, although a very weak result may hurt risk sentiment. More than forecast: generally supports the dollar.
Wed 5 Aug	11:00pm	US ISM Services PMI	High	Less than the 54.5 forecast: generally good for crypto and bad for the dollar. More than forecast: generally bad for crypto and good for the dollar if yields rise.
Wed 5 Aug	11:30pm	US crude-oil inventories	Medium	A larger build than forecast: usually bad for oil and can ease inflation pressure, which may help crypto. A larger draw: can lift oil, inflation expectations and the dollar.
Thu 6 Aug	10:30pm	US productivity and unit labour costs	High	Lower labour costs than forecast: generally good for crypto and bad for the dollar. Higher costs: generally bad for crypto because they can reinforce inflation pressure.
Fri 7 Aug	10:30pm	US nonfarm payrolls and unemployment	High	Weaker-than-forecast jobs with higher unemployment: often good for crypto and bad for the dollar if rate-cut expectations rise; an extreme miss may instead trigger growth fears.

The Ledger Insight

INTELLIGENCE BEFORE ACTION

The market is greener today but still below the last publication's levels. Treat the difference between a one-day bounce and a multi-day recovery as information: price, volume, sentiment and completed ETF flows should improve together before conviction rises.

Sources & Methodology

Market data: CoinGecko | **Sentiment:** Alternative.me
Fund flows: Farside Investors | **Altcoin fund flows:** Farside Investors
Global markets: Reuters | **Oil markets:** Reuters
Release schedule: US Bureau of Labor Statistics | **Services calendar:** ISM
Security report: New York Post | **Economic calendar:** Investing.com