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## Bitcoin Leads Global Asset Gains Amid Market Turmoil

August 4, 2025

– Categories: *Crypto*



Global financial markets have been shaken by new U.S. tariffs and unexpectedly weak economic data, sending shockwaves through equities, commodities, and digital assets. Yet over the past two years—from mid-2023 to mid-2025—Bitcoin has delivered exceptional gains, outpacing traditional asset classes by a wide margin.

## Market Context and Trigger Events

In early April 2025, the Trump administration unveiled a sweeping set of new tariffs, coinciding with disappointing employment figures in the U.S. That combination triggered abrupt risk-off sentiment, with broad selloffs across asset classes. The S&P 500 and Nasdaq both declined sharply, entering correction territory, while gold surged and cryptocurrencies fluctuated in response.

## Two-Year Performance Snapshot

According to recent reports, Bitcoin has soared by over 300 percent since mid-2023, substantially outperforming its peers. Over the same span, the S&P 500 returned about 38 percent, gold increased nearly 70 percent, and Ethereum rose roughly 56 percent, while oil prices remained relatively unchanged.

Independent performance data validates Bitcoin's status as a standout performer—even though exact percentages may vary slightly depending on timing, the overall relative outperformance holds. For instance, Bitcoin's price climbed from approximately \$26,000 in mid-2023 to over \$100,000 by late 2024, and reached above \$114,000 by early August 2025, representing gains well above 200 percent in many estimates.

By contrast, gold, a traditional safe haven, rose by around 27 percent in 2025 alone, and about 11 percent since early April 2025, though its longer-term growth remains more modest. The S&P 500, after strong gains in 2023 and 2024, is down over 12 percent so far in 2025, illustrating rising volatility across equities.

## Drivers Behind Bitcoin's Resilience

Bitcoin's growth narrative is grounded in several structural advantages. Its hard supply cap of 21 million coins is widely seen as a hedge against inflation and fiat monetary expansion. Broader adoption via institutional investors and Bitcoin ETFs—many launched in 2024—has increased market participation and liquidity. Digital infrastructure enhancements and regulatory shifts have also heightened investor interest.

Unlike traditional commodities, Bitcoin operates independently of physical supply chains and geopolitical production constraints. This structural independence has contributed to its appeal amid macroeconomic uncertainty, although many analysts emphasize that the cryptocurrency's volatility means it should not be viewed as a guaranteed safe haven.

## Short-Term Trends and Recovery Patterns

While market turbulence has led to sharp periodic dips in Bitcoin's price, historical patterns indicate that recovery can be swift. For example, after the April tariff announcements and broader selloffs, Bitcoin rebounded from lows near \$75,000 to highs above \$109,000 by mid-2025. Still, experts caution that past patterns are not determinants of future performance.

## Outlook for Investors

In summary, Bitcoin has delivered outsized returns compared to equities, gold, Ethereum, and oil over the past two years. Its performance stems from a combination of structural scarcity, increased institutional engagement, and digital infrastructure maturity. However, significant risks remain, and strategists urge caution given Bitcoin's inherent volatility and sensitivity to macro shocks.