## **Daily Bulletin**



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STOCKS | BONDS | INTEREST RATES | COMMODITIES | CURRENCIES

아시아 증시는 하락 마감했습니다. 중국과 한국 시장은 공휴일 휴장했습니다. 일본 증시는 미국연준의 통화정책 결정을 앞둔첫날 시장참가자들이 신중한 자세를 유지하며 하락했고, JGC Holdings가 실망스러운 수익전망으로 11% 넘게 떨어지며 가장큰 하락폭을 기록했습니다. 호주증시는 금, 자원 및 금속, 광업섹터 손실이 주가를 끌어내리면서 Omni Bridgeway Ltd 주가가 5년 내 최저치로 하락하는 등 하락세를 보였습니다.

유럽 증시는 공휴일 휴장했습니다. 그러나 수요일 영국 FTSE 100 지수는 잠정적으로 하락세로 마감하여 이전 하락폭을 확대 했습니다. 대출 기관 Nationwide 가 발표한 지수에 따르면 4월 영국 주택 가격은 두 달 연속 하락 했습니다. 한편, 명품 핸드백으로 유명한 영국 소매기업 Mulberry 주가는 연간 트레이딩 업데이트 에서 매출이 4% 감소하고 소매 매출이 3.2% 감소했다고 발표한 후 9% 넘게 하락했습니다.

미국 증시는 연준이 기준금리를 동결하고 다음 조치는 금리 인하가능성이 높지만 인플레이션의 지속적인 진전이 확실치 않다고 밝힌 후 혼조세로 마감했습니다. S&P 500 주요 11개 섹터 중 6개가에너지 주도로 하락 마감했습니다. Starbucks는 동일 매장 매출 감소를 보고한 후 연간 매출 전망치를 낮추면서 16% 급락했습니다. CVS Health는 연간 수익 전망치를 낮추고 1분기 실적에 대한 월스트리트 예상치를 하회하면서 16.5% 넘게 하락했습니다.

미 국채 금리는 연준이 예상대로 금리를 동결했지만 언젠가는 금리를 인하할 계획이 있음을 시사하며 하락세로 돌아섰습니다.

국제 유가는 미국 원유 재고의 깜짝 증가, 중동 휴전 합의 전망, 원유 수요를 증가시킬 수 있는 미국의 단기 금리 인하에 대한 기대감이 사라지면서 약 3% 하락, 7주 내 최저치를 기록했습니다.

M SCI	Latest	1 Day	MTD	YTD	Q1 24	Q4 23	Q3 23	Apr-24	Mar-24	Feb-24
World	754	-0.3	-0.3	4.5	8.3	11.1	-3.3	-3.3	3.2	4.3
United States	4,782	-0.3	-0.3	5.5	10.4	11.9	-3.1	-4.1	3.2	5.4
Europe	2,057	-0.2	-0.2	3.3	5.4	11.1	-4.9	-1.7	3.9	1.6
Japan	3,849	-0.7	-0.7	5.0	11.2	8.2	-1.5	-4.9	3.2	3.0
<b>Emerging Markets</b>	1,046	0.0	0.0	2.9	2.4	7.9	-2.8	0.5	2.5	4.8
Asia Pac Ex Japan	538	-0.2	-0.2	2.4	2.1	7.9	-3.3	0.4	2.6	4.5
Asia Ex Japan	662	0.0	0.0	3.7	2.4	6.5	-3.2	1.3	2.6	5.6
Australia	877	-1.2	-1.2	-4.1	0.8	15.3	-3.3	-3.8	3.0	-0.6
Hong Kong	7,930	0.0	0.0	-7.1	-11.7	3.4	-11.1	5.2	-6.5	4.6
China H	58	0.0	0.0	4.3	-2.2	-4.2	-1.8	6.6	0.9	8.4
China A	1,642	0.1	0.1	3.3	0.7	-4.1	-3.4	2.5	-0.1	10.0
Korea	486	Hol.	0.0	-4.1	1.8	15.4	-6.6	-5.7	5.3	7.4
Taiwan	699	Hol.	0.0	9.9	12.5	17.5	-7.1	-2.3	7.9	5.5
Thailand	309	Hol.	0.0	-9.2	-8.1	3.9	-4.4	-1.2	-0.9	0.7
Malaysia	257	Hol.	0.0	4.6	3.0	4.6	4.5	1.6	1.0	2.4
Singapore	3,188	-0.1	-0.1	4.1	0.1	4.5	-0.3	4.0	3.8	0.9
Indonesia	741	Hol.	0.0	-6.1	2.6	2.0	-3.3	-8.5	1.1	3.2
India	999	Hol.	0.0	8.6	6.1	12.0	2.9	2.3	0.8	2.8
Philippines	422	Hol.	0.0	0.3	6.4	6.5	-3.5	-5.8	-0.1	5.5
Local Indices	Latest	1 Day	MTD	YTD	Q1 24	Q4 23	Q3 23	Apr-24	Mar-24	Feb-24
Local Indices DJA	37,903	0.2	0.2	1.1	6.1	13.1	-2.1	-4.9	Mar-24 2.2	2.5
DJA Nasdaq	37,903 15,605	0.2	0.2 -0.3	1.1 4.2	6.1 9.3	13.1 13.8		-4.9 -4.4	2.2 1.8	2.5 6.2
DJA Nasdaq S&P 500	37,903 15,605 5,018	0.2 -0.3 -0.3	0.2 -0.3 -0.3	1.1 4.2 5.7	6.1 9.3 10.6	13.1 13.8 11.7	-2.1 -3.9 -3.3	-4.9 -4.4 -4.1	2.2 1.8 3.2	2.5 6.2 5.3
DJA Nasdaq S&P 500 Euro Stoxx 600	37,903 15,605 5,018 504	0.2 -0.3 -0.3 -0.1	0.2 -0.3 -0.3 -0.1	1.1 4.2 5.7 6.8	6.1 9.3 10.6 7.8	13.1 13.8 11.7 6.8	-2.1 -3.9 -3.3 -2.1	-4.9 -4.4 -4.1 -0.8	2.2 1.8 3.2 4.2	2.5 6.2 5.3 2.0
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100	37,903 15,605 5,018 504 8,121	0.2 -0.3 -0.3 -0.1 -0.3	0.2 -0.3 -0.3 -0.1 -0.3	1.1 4.2 5.7 6.8 6.5	6.1 9.3 10.6 7.8 4.0	13.1 13.8 11.7 6.8 2.3	-2.1 -3.9 -3.3 -2.1 2.2	-4.9 -4.4 -4.1 -0.8 2.7	2.2 1.8 3.2 4.2 4.8	2.5 6.2 5.3 2.0 0.5
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX	37,903 15,605 5,018 504 8,121 17,932	0.2 -0.3 -0.3 -0.1 -0.3 Hol.	0.2 -0.3 -0.3 -0.1 -0.3 0.0	1.1 4.2 5.7 6.8 6.5 7.0	6.1 9.3 10.6 7.8 4.0 10.4	13.1 13.8 11.7 6.8 2.3 8.9	-2.1 -3.9 -3.3 -2.1 2.2 -4.7	-4.9 -4.4 -4.1 -0.8 2.7 -3.0	2.2 1.8 3.2 4.2 4.8 4.6	2.5 6.2 5.3 2.0 0.5 4.6
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40	37,903 15,605 5,018 504 8,121 17,932 7,985	0.2 -0.3 -0.3 -0.1 -0.3 Hol. Hol.	0.2 -0.3 -0.3 -0.1 -0.3 0.0	1.1 4.2 5.7 6.8 6.5 7.0 6.9	6.1 9.3 10.6 7.8 4.0 10.4 9.0	13.1 13.8 11.7 6.8 2.3 8.9 5.9	-2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4	-4.9 -4.4 -4.1 -0.8 2.7 -3.0 -1.9	2.2 1.8 3.2 4.2 4.8 4.6 3.6	2.5 6.2 5.3 2.0 0.5 4.6 3.5
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB	37,903 15,605 5,018 504 8,121 17,932 7,985 33,747	0.2 -0.3 -0.3 -0.1 -0.3 Hol. Hol.	0.2 -0.3 -0.3 -0.1 -0.3 0.0 0.0	1.1 4.2 5.7 6.8 6.5 7.0 6.9 13.5	6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1	13.1 13.8 11.7 6.8 2.3 8.9 5.9	-2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6	-4.9 -4.4 -4.1 -0.8 2.7 -3.0 -1.9	2.2 1.8 3.2 4.2 4.8 4.6 3.6 6.8	2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35	37,903 15,605 5,018 504 8,121 17,932 7,985 33,747 10,854	0.2 -0.3 -0.3 -0.1 -0.3 Hol. Hol. Hol.	0.2 -0.3 -0.3 -0.1 -0.3 0.0 0.0 0.0	1.1 4.2 5.7 6.8 6.5 7.0 6.9 13.5 9.5	6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6	13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2	-2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6 -0.8	-4.9 -4.4 -4.1 -0.8 2.7 -3.0 -1.9 -1.4	2.2 1.8 3.2 4.2 4.8 4.6 3.6 6.8 11.2	2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	37,903 15,605 5,018 504 8,121 17,932 7,985 33,747 10,854 17,763	0.2 -0.3 -0.3 -0.1 -0.3 Hol. Hol. Hol.	0.2 -0.3 -0.3 -0.1 -0.3 0.0 0.0 0.0	1.1 4.2 5.7 6.8 6.5 7.0 6.9 13.5 9.5 4.7	6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6	13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2	-2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6 -0.8 -4.2	-4.9 -4.4 -4.1 -0.8 2.7 -3.0 -1.9 -1.4 -1.0	2.2 1.8 3.2 4.2 4.8 4.6 3.6 6.8 11.2	2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0 -0.7 6.6
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	37,903 15,605 5,018 504 8,121 17,932 7,985 33,747 10,854 17,763 38,274	0.2 -0.3 -0.3 -0.1 -0.3 Hol. Hol. Hol. Hol.	0.2 -0.3 -0.3 -0.1 -0.3 0.0 0.0 0.0 0.0	1.1 4.2 5.7 6.8 6.5 7.0 6.9 13.5 9.5 4.7	6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5 21.5	13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2 -3.9 5.2	-2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6 -0.8 -4.2 -3.3	-4.9 -4.4 -4.1 -0.8 2.7 -3.0 -1.9 -1.4 -1.0 7.4 -4.9	2.2 1.8 3.2 4.2 4.8 4.6 3.6 6.8 11.2 0.6 3.8	2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0 -0.7 6.6 8.0
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	37,903 15,605 5,018 504 8,121 17,932 7,985 33,747 10,854 17,763	0.2 -0.3 -0.3 -0.1 -0.3 Hol. Hol. Hol.	0.2 -0.3 -0.3 -0.1 -0.3 0.0 0.0 0.0	1.1 4.2 5.7 6.8 6.5 7.0 6.9 13.5 9.5 4.7	6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6	13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2	-2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6 -0.8 -4.2	-4.9 -4.4 -4.1 -0.8 2.7 -3.0 -1.9 -1.4 -1.0	2.2 1.8 3.2 4.2 4.8 4.6 3.6 6.8 11.2	2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0 -0.7 6.6
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	37,903 15,605 5,018 504 8,121 17,932 7,985 33,747 10,854 17,763 38,274	0.2 -0.3 -0.3 -0.1 -0.3 Hol. Hol. Hol. Hol.	0.2 -0.3 -0.3 -0.1 -0.3 0.0 0.0 0.0 0.0	1.1 4.2 5.7 6.8 6.5 7.0 6.9 13.5 9.5 4.7	6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5 21.5	13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2 -3.9 5.2	-2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6 -0.8 -4.2 -3.3	-4.9 -4.4 -4.1 -0.8 2.7 -3.0 -1.9 -1.4 -1.0 7.4 -4.9	2.2 1.8 3.2 4.2 4.8 4.6 3.6 6.8 11.2 0.6 3.8	2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0 -0.7 6.6 8.0
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI	37,903 15,605 5,018 504 8,121 17,932 7,985 33,747 10,854 17,763 38,274 365	0.2 -0.3 -0.3 -0.1 -0.3 Hol. Hol. Hol. Hol. Hol. Hol.	0.2 -0.3 -0.3 -0.1 -0.3 0.0 0.0 0.0 0.0 -0.3	1.1 4.2 5.7 6.8 6.5 7.0 6.9 13.5 9.5 4.7 15.2 2.1	6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5 21.5 4.8	13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2 -3.9 5.2 8.3	-2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6 -0.8 -4.2 -3.3 -3.9	-4.9 -4.4 -4.1 -0.8 2.7 -3.0 -1.9 -1.4 -1.0 7.4 -4.9 -2.6	2.2 1.8 3.2 4.2 4.8 4.6 3.6 6.8 11.2 0.6 3.8 5.4	2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0 -0.7 6.6 8.0 5.7
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities	37,903 15,605 5,018 504 8,121 17,932 7,985 33,747 10,854 17,763 38,274 365 Latest	0.2 -0.3 -0.3 -0.1 -0.3 Hol. Hol. Hol. Hol. Hol. 1 Day	0.2 -0.3 -0.3 -0.1 -0.3 0.0 0.0 0.0 0.0 -0.3 0.0	1.1 4.2 5.7 6.8 6.5 7.0 6.9 13.5 9.5 4.7 15.2 2.1	6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5 21.5 4.8 <b>Q1 24</b>	13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2 -3.9 5.2 8.3	-2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6 -0.8 -4.2 -3.3 -3.9	-4.9 -4.4 -4.1 -0.8 2.7 -3.0 -1.9 -1.4 -1.0 7.4 -4.9 -2.6 Apr-24	2.2 1.8 3.2 4.2 4.8 4.6 3.6 6.8 11.2 0.6 3.8 5.4	2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0 -0.7 6.6 8.0 5.7
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent	37,903 15,605 5,018 504 8,121 17,932 7,985 33,747 10,854 17,763 38,274 365 Latest 83.6	0.2 -0.3 -0.3 -0.1 -0.3 Hol. Hol. Hol. Hol. 1 Day	0.2 -0.3 -0.3 -0.1 -0.3 0.0 0.0 0.0 0.0 -0.3 0.0 MTD	1.1 4.2 5.7 6.8 6.5 7.0 6.9 13.5 9.5 4.7 15.2 2.1 YTD	6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5 21.5 4.8 Q1 24	13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2 -3.9 5.2 8.3 <b>Q4 23</b>	-2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6 -0.8 -4.2 -3.3 -3.9 <b>Q3 23</b>	-4.9 -4.4 -4.1 -0.8 2.7 -3.0 -1.9 -1.4 -1.0 7.4 -4.9 -2.6 <b>Apr-24</b>	2.2 1.8 3.2 4.2 4.8 4.6 3.6 6.8 11.2 0.6 3.8 5.4 Mar-24	2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0 -0.7 6.6 8.0 5.7 Feb-24
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent WTI	37,903 15,605 5,018 504 8,121 17,932 7,985 33,747 10,854 17,763 38,274 365 <b>Latest</b> 83.6 79.1	0.2 -0.3 -0.3 -0.1 -0.3 Hol. Hol. Hol. Hol. 1 Day	0.2 -0.3 -0.3 -0.1 -0.3 0.0 0.0 0.0 0.0 0.0 -0.3 0.0 MTD -2.7 -3.0	1.1 4.2 5.7 6.8 6.5 7.0 6.9 13.5 9.5 4.7 15.2 2.1 YTD 8.5 10.9	6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5 21.5 4.8 <b>Q1 24</b> 12.9 16.6	13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2 -3.9 5.2 8.3 <b>Q4 23</b>	-2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6 -0.8 -4.2 -3.3 -3.9 Q3 23 23.1 28.5	-4.9 -4.4 -4.1 -0.8 2.7 -3.0 -1.9 -1.4 -1.0 7.4 -4.9 -2.6 <b>Apr-24</b>	2.2 1.8 3.2 4.2 4.8 4.6 3.6 6.8 11.2 0.6 3.8 5.4 Mar-24	2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0 -0.7 6.6 8.0 5.7 Feb-24
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent WTI US 10Y yield	37,903 15,605 5,018 504 8,121 17,932 7,985 33,747 10,854 17,763 38,274 365 <b>Latest</b> 83.6 79.1 4.63	0.2 -0.3 -0.3 -0.1 -0.3 Hol. Hol. Hol. Hol. 2-0.3 Hol. 1 Day -2.7 -3.0 -1.3	0.2 -0.3 -0.3 -0.1 -0.3 0.0 0.0 0.0 0.0 0.0 -0.3 0.0 MTD -2.7 -3.0 -1.3	1.1 4.2 5.7 6.8 6.5 7.0 6.9 13.5 9.5 4.7 15.2 2.1 YTD 8.5 10.9	6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5 21.5 4.8 <b>Q1 24</b> 12.9 16.6 8.2	13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2 -3.9 5.2 8.3 <b>Q4 23</b> -16.4 -21.4	-2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6 -0.8 -4.2 -3.3 -3.9 Q3 23 23.1 28.5 20.5	-4.9 -4.4 -4.1 -0.8 2.7 -3.0 -1.9 -1.4 -1.0 7.4 -4.9 -2.6 Apr-24 -1.2 -1.9 11.7	2.2 1.8 3.2 4.2 4.8 4.6 3.6 6.8 11.2 0.6 3.8 5.4 Mar-24	2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0 -0.7 6.6 8.0 5.7 Feb-24 4.7 6.6 2.8

Source: Eastspring Investments (Singapore) Limited., MSCI in USD terms. Local indices are in local currency terms. MTD stands for month to date. YTD stands for year to date. NA represents not available.

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