## **Daily Bulletin**



A Prudential plc company

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STOCKS | BONDS | INTEREST RATES | COMMODITIES | CURRENCIES

아시아 증시는 대체로 하락 마감 했습니다. 중국 증시는 예상보다 부진한 3월 소비자 지표 발표 후 보합세를 보였고, 수요 부진이 지속되면서 정책당국이 추가 부양책을 내놓아야 한다는 압박이 이어졌습니다. 한국의 주가는 외국인이 반도체와 자동차주를 사들이면서 상승했지만 정부의 기업 개혁 계획에 대한 투자자들의 의구심은 지속되었습니다. 일본 시장은 채권 금리 급등이 기술주와 부동산주에 부담을 주면서 하락했습니다.

유럽 증시는 유럽중앙은행이 금리를 동결했지만 인하가 임박했다는 신호로 은행들이 타격을 입으면서 하락 마감했습니다. 은행은 2.4% 하락했고, 대부분의 섹터가 하락 했습니다. Lufthansa는 시리아 주재 이스라엘 대사관에 대한 공습으로 의심되는 이란의 보복에 대해 중동 지역이 경계하는 중 테헤란행 항공편 운항 중단을 연장하며 2.7% 넘게 하락했습니다. 그러나 AstraZeneca는 연간 배당을 7% 인상할 계획이라고 발표한 후 2% 이상 올랐습니다.

미국 증시는 기술 관련 모멘텀주가 상승세를 주도한 가운데 새로운 경제지표가 인플레이션이 진정 추세에 있다는 희망을 다시 불러일으키며 상승했습니다. S&P 500 주요 11개 섹터 중 5개가 정보 기술 섹터 주도로 상승세로 장을 마감했습니다. 그러나 중고차 소매기업 CarMax 주가는 4분기 실적에 대한 애널리스트들의 예상치를 하회하고 장기 차량판매 목표를 달성하지 못할 수도 있다고 밝힌 후 13% 넘게하락했습니다.

미 국채 금리는 시장 참가자들이 연준이 언제 금리 인하를 시작 할지에 대한 단서를 찾기 위해 새로운 미국 인플레이션 데이터를 분석하면서 상승했습니다.

국제 유가는 지속적인 인플레이션 이 금리 인하 낙관론을 약화 시키면서 하락했지만, 투자자들이 이란의 이스라엘 이익에 대한 잠재적 공격에 주목하면서 6개월 내 최고치를 유지했습니다.

M SCI	Latest	1 Day	MTD	YTD	Q1 24	Q4 23	Q3 23	Mar-24	Feb-24	Jan-24
World	775	0.3	-1.1	7.2	8.3	11.1	-3.3	3.2	4.3	0.6
United States	4,956	0.8	-1.0	9.3	10.4	11.9	-3.1	3.2	5.4	1.6
Europe	2,062	-0.8	-2.3	2.9	5.4	11.1	-4.9	3.9	1.6	-0.1
Japan	3,984	-0.2	-2.2	8.7	11.2	8.2	-1.5	3.2	3.0	4.6
Emerging Markets	1,055	-0.3	1.2	3.7	2.4	7.9	-2.8	2.5	4.8	-4.6
Asia Pac Ex Japan	542	-0.3	0.9	3.0	2.1	7.9	-3.3	2.6	4.5	-4.8
Asia Ex Japan	663	-0.3	1.3	3.7	2.4	6.5	-3.2	2.6	5.6	-5.4
Australia	912	-0.6	-1.1	-0.3	0.8	15.3	-3.3	3.0	-0.6	-1.6
Hong Kong	7,632	-0.8	1.2	-10.6	-11.7	3.4	-11.1	-6.5	4.6	-9.7
China H	56	-0.1	2.6	0.3	-2.2	-4.2	-1.8	0.9	8.4	-10.6
China A	1,593	0.1	-0.6	0.1	0.7	-4.1	-3.4	-0.1	10.0	-8.3
Korea	502	-0.4	-2.7	-1.0	1.8	15.4	-6.6	5.3	7.4	-10.0
Taiwan	728	-0.6	1.7	14.4	12.5	17.5	-7.1	7.9	5.5	-1.2
Thailand	318	-1.6	1.4	-6.8	-8.1	3.9	-4.4	-0.9	0.7	-7.9
Malaysia	255	Hol.	8.0	3.8	3.0	4.6	4.5	1.0	2.4	-0.3
Singapore	3,110	-0.5	8.0	0.9	0.1	4.5	-0.3	3.8	0.9	-4.4
Indonesia	787	Hol.	-2.8	-0.2	2.6	2.0	-3.3	1.1	3.2	-1.6
India	1,001	Hol.	2.6	8.9	6.1	12.0	2.9	0.8	2.8	2.4
Philippines	431	-1.0	-3.7	2.4	6.4	6.5	-3.5	-0.1	5.5	1.0
		4.5	MED	VED	04.04	04.00	02.22			
Local Indices	Latest	1 Day	MTD	YTD	Q1 24	Q4 23	Q3 23	Mar-24	Feb-24	Jan-24
DJA	38,459	0.0	-3.3	2.6	6.1	13.1	-2.1	2.2	2.5	1.3
DJA Nasdaq	38,459 16,442	0.0 1.7	-3.3 0.4	2.6 9.7	6.1 9.3	13.1 13.8	-2.1 -3.9	2.2 1.8	2.5 6.2	1.3 1.0
DJA Nasdaq S&P 500	38,459 16,442 5,199	0.0 1.7 0.7	-3.3 0.4 -1.0	2.6 9.7 9.4	6.1 9.3 10.6	13.1 13.8 11.7	-2.1 -3.9 -3.3	2.2 1.8 3.2	2.5 6.2 5.3	1.3 1.0 1.7
DJA Nasdaq S&P 500 Euro Stoxx 600	38,459 16,442 5,199 505	0.0 1.7 0.7 -0.3	-3.3 0.4 -1.0 -1.5	2.6 9.7 9.4 6.2	6.1 9.3 10.6 7.8	13.1 13.8 11.7 6.8	-2.1 -3.9 -3.3 -2.1	2.2 1.8 3.2 4.2	2.5 6.2 5.3 2.0	1.3 1.0 1.7 1.5
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100	38,459 16,442 5,199 505 7,924	0.0 1.7 0.7 -0.3 -0.3	-3.3 0.4 -1.0 -1.5 -0.2	2.6 9.7 9.4 6.2 3.8	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	2.2 1.8 3.2 4.2 4.8	2.5 6.2 5.3 2.0 0.5	1.3 1.0 1.7 1.5 -1.3
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX	38,459 16,442 5,199 505 7,924 17,954	0.0 1.7 0.7 -0.3 -0.3	-3.3 0.4 -1.0 -1.5 -0.2 -2.9	2.6 9.7 9.4 6.2 3.8 7.2	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	2.2 1.8 3.2 4.2 4.8 4.6	2.5 6.2 5.3 2.0 0.5 4.6	1.3 1.0 1.7 1.5 -1.3
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40	38,459 16,442 5,199 505 7,924 17,954 8,024	0.0 1.7 0.7 -0.3 -0.3 -0.8 -0.3	-3.3 0.4 -1.0 -1.5 -0.2 -2.9 -2.2	2.6 9.7 9.4 6.2 3.8 7.2 6.6	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	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	1.3 1.0 1.7 1.5 -1.3 0.9 1.6
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB	38,459 16,442 5,199 505 7,924 17,954 8,024 33,714	0.0 1.7 0.7 -0.3 -0.3 -0.8 -0.3	-3.3 0.4 -1.0 -1.5 -0.2 -2.9 -2.2 -3.0	2.6 9.7 9.4 6.2 3.8 7.2 6.6 11.7	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	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	1.3 1.0 1.7 1.5 -1.3 0.9 1.6
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35	38,459 16,442 5,199 505 7,924 17,954 8,024 33,714 10,650	0.0 1.7 0.7 -0.3 -0.3 -0.8 -0.3 -1.0	-3.3 0.4 -1.0 -1.5 -0.2 -2.9 -2.2 -3.0 -3.4	2.6 9.7 9.4 6.2 3.8 7.2 6.6 11.7 6.8	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	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	1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	38,459 16,442 5,199 505 7,924 17,954 8,024 33,714 10,650 17,095	0.0 1.7 0.7 -0.3 -0.3 -0.8 -0.3 -1.0 -1.2	-3.3 0.4 -1.0 -1.5 -0.2 -2.9 -2.2 -3.0 -3.4 3.4	2.6 9.7 9.4 6.2 3.8 7.2 6.6 11.7 6.8 0.8	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	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	1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	38,459 16,442 5,199 505 7,924 17,954 8,024 33,714 10,650 17,095 39,443	0.0 1.7 0.7 -0.3 -0.3 -0.8 -0.3 -1.0 -1.2 -0.3 -0.4	-3.3 0.4 -1.0 -1.5 -0.2 -2.9 -2.2 -3.0 -3.4 3.4 -2.3	2.6 9.7 9.4 6.2 3.8 7.2 6.6 11.7 6.8 0.8	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	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	1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2 -9.2
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	38,459 16,442 5,199 505 7,924 17,954 8,024 33,714 10,650 17,095	0.0 1.7 0.7 -0.3 -0.3 -0.8 -0.3 -1.0 -1.2	-3.3 0.4 -1.0 -1.5 -0.2 -2.9 -2.2 -3.0 -3.4 3.4	2.6 9.7 9.4 6.2 3.8 7.2 6.6 11.7 6.8 0.8	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	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	1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	38,459 16,442 5,199 505 7,924 17,954 8,024 33,714 10,650 17,095 39,443	0.0 1.7 0.7 -0.3 -0.3 -0.8 -0.3 -1.0 -1.2 -0.3 -0.4	-3.3 0.4 -1.0 -1.5 -0.2 -2.9 -2.2 -3.0 -3.4 3.4 -2.3	2.6 9.7 9.4 6.2 3.8 7.2 6.6 11.7 6.8 0.8	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	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	1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2 -9.2
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI	38,459 16,442 5,199 505 7,924 17,954 8,024 33,714 10,650 17,095 39,443 371	0.0 1.7 0.7 -0.3 -0.8 -0.3 -1.0 -1.2 -0.3 -0.4 0.1	-3.3 0.4 -1.0 -1.5 -0.2 -2.9 -2.2 -3.0 -3.4 3.4 -2.3 -1.1	2.6 9.7 9.4 6.2 3.8 7.2 6.6 11.7 6.8 0.8 18.7 3.7	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	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	1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2 -9.2 8.4 -6.0
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities	38,459 16,442 5,199 505 7,924 17,954 8,024 33,714 10,650 17,095 39,443 371 Latest	0.0 1.7 0.7 -0.3 -0.3 -0.8 -0.3 -1.0 -1.2 -0.3 -0.4 0.1	-3.3 0.4 -1.0 -1.5 -0.2 -2.9 -2.2 -3.0 -3.4 3.4 -2.3 -1.1	2.6 9.7 9.4 6.2 3.8 7.2 6.6 11.7 6.8 0.8 18.7 3.7	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 Q3 23	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	1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2 -9.2 8.4 -6.0
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent	38,459 16,442 5,199 505 7,924 17,954 8,024 33,714 10,650 17,095 39,443 371 Latest 90.2	0.0 1.7 0.7 -0.3 -0.3 -0.8 -0.3 -1.0 -1.2 -0.3 -0.4 0.1 1 Day	-3.3 0.4 -1.0 -1.5 -0.2 -2.9 -2.2 -3.0 -3.4 3.4 -2.3 -1.1 MTD	2.6 9.7 9.4 6.2 3.8 7.2 6.6 11.7 6.8 0.8 18.7 3.7 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 <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> -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 <b>Q3 23</b> 23.1 28.5	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	1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2 -9.2 8.4 -6.0 Jan-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	38,459 16,442 5,199 505 7,924 17,954 8,024 33,714 10,650 17,095 39,443 371 Latest 90.2 85.5	0.0 1.7 0.7 -0.3 -0.3 -0.8 -0.3 -1.0 -1.2 -0.3 -0.4 0.1 1 Day -0.5 -1.0	-3.3 0.4 -1.0 -1.5 -0.2 -2.9 -2.2 -3.0 -3.4 3.4 -2.3 -1.1 MTD	2.6 9.7 9.4 6.2 3.8 7.2 6.6 11.7 6.8 0.8 18.7 3.7 YTD 17.1 19.9 17.5	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 <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 20.5	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	1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2 -9.2 8.4 -6.0 Jan-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	38,459 16,442 5,199 505 7,924 17,954 8,024 33,714 10,650 17,095 39,443 371 Latest 90.2 85.5 4.56	0.0 1.7 0.7 -0.3 -0.3 -0.8 -0.3 -1.0 -1.2 -0.3 -0.4 0.1 1 Day -0.5 -1.0 0.2	-3.3 0.4 -1.0 -1.5 -0.2 -2.9 -2.2 -3.0 -3.4 3.4 -2.3 -1.1 MTD 3.7 2.8 8.6	2.6 9.7 9.4 6.2 3.8 7.2 6.6 11.7 6.8 0.8 18.7 3.7 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 <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 <b>Q3 23</b> 23.1 28.5	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	1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2 -9.2 8.4 -6.0 Jan-24

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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