STOCKS | BONDS | INTEREST RATES | COMMODITIES | CURRENCIES

아시아 증시는 상승세로 마감 했습니다. 중국 증시는 상하이가 제한조치 완화에 필요한 주요 Covid-19 관련 사항을 진행하면서 상승했으며 대형 기술주들은 6주만에 가장 큰 상승을 보였습니다. 한국의 주가는 기술 대기업 삼성 전자와 동종기업 SK하이닉스가 각각 약 2%씩 오르며 상승했습니다. 일본 시장은 주요 무역상대국인 중국에 대한 COVID-19 봉쇄에 대한 낙관론이 실망스러운실적으로 상쇄되면서 소폭 상승했습니다.

유럽 증시는 중국정부가 COVID-19 제한을 완화하기를 기대하면서 중국의 수요가 유지될 수 있다는 희망으로 상승세로 마감했습니다. 거의 모든 섹터와 주요 증시가 3% 상승한 기초 자원주 주도로 상승했습니다. 전력 발전 기업 ContourGlobal은 미국 사모펀드회사인 KKR이 21억 6천만 달러에 해당 기업을 인수하기로 합의한후 약 33% 급등했습니다. 스웨덴투자 회사 Storskogen Group은 1분기 실적 발표 이후 16% 이상하락했습니다.

미국 증시는 4월 소매 판매 호조로 경제 성장 둔화에 대한 우려가 완화된 후 애플 및 테슬라 같은 초대형 성장주 주도로 상승했습니다. 11개 주요 S&P 500 섹터 중 10개가 금융 및 재료 섹터 주도로 상승했습니다. United Airlines Holdings는 이번 분기수익 예측을 상향 조정한 후 약8% 상승했습니다. 그러나 월마트가 연간 이익 전망을 하향 조정한후 마진에 타격을 시사하며 11%이상 폭락하며 1987년 이후 하루최대 하락폭을 보였습니다.

미 국채금리는 소매 판매가 예상 과 일치하고 투자자들이 제롬 파월 연준 의장의 발언을 소화 하면서 상승했습니다. 10년 만기 금리는 2.9%에 달했습니다.

국제 유가는 헝가리가 유럽연합이 러시아산 원유 수입 금지를 추진 하는 것에 저항하고 글로벌 공급 을 타이트하게 만들며 투자자들이 최근 상승세로 수익을 실현하며 하락했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q1 22	Q4 21	Q3 21	Apr-22	Mar-22	Feb-22
World	640	2.0	-1.9	-14.4	-5.3	6.8	-1.0	-8.0	2.2	-2.6
United States	3,886	2.0	-1.3	-14.9	-5.2	10.1	0.4	-9.1	3.5	-2.9
Europe	1,761	2.5	-2.0	-14.2	-7.2	5.7	-1.5	-5.6	0.0	-2.8
Japan	3,200	0.0	-1.5	-15.9	-6.4	-3.9	4.7	-8.8	-0.3	-1.1
Emerging Markets	1,031	2.3	-4.2	-15.7	-6.9	-1.2	-8.0	-5.6	-2.2	-3.0
Asia Pac Ex Japan	536	2.4	-4.1	-14.3	-5.6	-0.7	-8.3	-5.3	-0.6	-1.1
Asia Ex Japan	659	2.6	-4.0	-16.2	-8.0	-1.2	-9.2	-5.2	-2.7	-2.3
Australia	880	1.2	-4.8	-3.9	7.3	2.1	-3.0	-5.9	11.1	5.9
Hong Kong	10,511	2.2	-0.1	-6.8	-1.8	-3.5	-9.4	-5.0	0.0	-2.8
China H	66	3.9	-3.6	-20.6	-14.2	-6.1	-18.1	-4.1	-8.0	-3.9
China A	1,976	2.1	-0.9	-23.5	-14.5	3.2	-4.3	-9.7	-8.7	2.6
Korea	496	1.8	-3.2	-17.9	-9.5	-0.7	-13.2	-6.3	0.0	8.0
Taiwan	600	1.4	-3.9	-19.0	-6.5	8.5	-1.7	-9.8	-2.2	-2.5
Thailand	372	2.7	-1.5	-2.1	4.2	3.0	-3.5	-4.6	-1.3	5.4
Malaysia	278	0.5	-4.2	-5.0	2.0	1.8	0.2	-2.7	0.2	5.5
Singapore	3,072	2.4	-4.4	-13.0	-1.7	-3.4	0.0	-7.5	0.5	-1.2
Indonesia	790	0.5	-8.9	3.9	9.9	6.5	9.5	3.8	3.6	5.5
India	756	2.6	-7.1	-10.3	-1.8	-0.1	12.7	-1.7	3.7	-4.0
Philippines	450	1.6	-2.1	-7.8	2.4	3.7	-3.5	-8.0	-1.7	0.1
Local Indices	Latest	1 Day	MTD	YTD	Q1 22	Q4 21	Q3 21	Apr-22	Mar-22	Feb-22
DJIA		4.0				7.0	1 E	4.0		
DOIA	32,655	1.3	-0.9	- 9.5	-4.1	7.9	-1.5	-4.8	2.5	-3.3
Nasdaq	32,655 11,985	2.8	-2.8	-23.2	-4.1 -8.9	7.9 8.4	-1.5 -0.2	-4.8 -13.2	2.5 3.5	-3.3 -3.3
	•	2.8 2.0	-2.8 -0.9	-23.2 -13.7	-8.9 -4.6	8.4 11.0	-0.2 0.6			
Nasdaq	11,985 4,089 439	2.8 2.0 1.3	-2.8 -0.9 -2.0	-23.2 -13.7 -8.3	-8.9 -4.6 -5.9	8.4 11.0 7.6	-0.2 0.6 0.9	-13.2 -8.7 -0.6	3.5 3.7 1.1	-3.3 -3.0 -3.2
Nasdaq S&P 500	11,985 4,089	2.8 2.0	-2.8 -0.9	-23.2 -13.7	-8.9 -4.6	8.4 11.0	-0.2 0.6	-13.2 -8.7	3.5 3.7	-3.3 -3.0
Nasdaq S&P 500 Euro Stoxx 600	11,985 4,089 439	2.8 2.0 1.3	-2.8 -0.9 -2.0	-23.2 -13.7 -8.3	-8.9 -4.6 -5.9	8.4 11.0 7.6	-0.2 0.6 0.9	-13.2 -8.7 -0.6	3.5 3.7 1.1	-3.3 -3.0 -3.2
Nasdaq S&P 500 Euro Stoxx 600 FTSE100	11,985 4,089 439 7,518	2.8 2.0 1.3 0.7	-2.8 -0.9 -2.0 -0.3	-23.2 -13.7 -8.3 3.4	-8.9 -4.6 -5.9 2.9	8.4 11.0 7.6 4.7	-0.2 0.6 0.9 2.0	-13.2 -8.7 -0.6 0.8 -2.2 -1.3	3.5 3.7 1.1 1.4	-3.3 -3.0 -3.2 0.3
Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX	11,985 4,089 439 7,518 14,186	2.8 2.0 1.3 0.7 1.6	-2.8 -0.9 -2.0 -0.3 0.6	-23.2 -13.7 -8.3 3.4 -10.7	-8.9 -4.6 -5.9 2.9 -9.3	8.4 11.0 7.6 4.7 4.1	-0.2 0.6 0.9 2.0 -1.7	-13.2 -8.7 -0.6 0.8 -2.2	3.5 3.7 1.1 1.4 -0.3	-3.3 -3.0 -3.2 0.3 -6.5
Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40	11,985 4,089 439 7,518 14,186 6,430	2.8 2.0 1.3 0.7 1.6 1.5	-2.8 -0.9 -2.0 -0.3 0.6 -0.7	-23.2 -13.7 -8.3 3.4 -10.7 -8.5	-8.9 -4.6 -5.9 2.9 -9.3 -6.7	8.4 11.0 7.6 4.7 4.1 9.9	-0.2 0.6 0.9 2.0 -1.7 0.4	-13.2 -8.7 -0.6 0.8 -2.2 -1.3	3.5 3.7 1.1 1.4 -0.3 0.1	-3.3 -3.0 -3.2 0.3 -6.5 -4.9
Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB	11,985 4,089 439 7,518 14,186 6,430 24,302	2.8 2.0 1.3 0.7 1.6 1.5	-2.8 -0.9 -2.0 -0.3 0.6 -0.7 0.2	-23.2 -13.7 -8.3 3.4 -10.7 -8.5 -9.8	-8.9 -4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6 -5.7	8.4 11.0 7.6 4.7 4.1 9.9 7.7	-0.2 0.6 0.9 2.0 -1.7 0.4 3.0	-13.2 -8.7 -0.6 0.8 -2.2 -1.3 -2.0	3.5 3.7 1.1 1.4 -0.3 0.1 -1.5	-3.3 -3.0 -3.2 0.3 -6.5 -4.9 -5.2
Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35	11,985 4,089 439 7,518 14,186 6,430 24,302 8,476	2.8 2.0 1.3 0.7 1.6 1.5 1.1	-2.8 -0.9 -2.0 -0.3 0.6 -0.7 0.2 -1.2	-23.2 -13.7 -8.3 3.4 -10.7 -8.5 -9.8 -1.3	-8.9 -4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6	8.4 11.0 7.6 4.7 4.1 9.9 7.7 -0.3	-0.2 0.6 0.9 2.0 -1.7 0.4 3.0 0.3	-13.2 -8.7 -0.6 0.8 -2.2 -1.3 -2.0 2.6	3.5 3.7 1.1 1.4 -0.3 0.1 -1.5	-3.3 -3.0 -3.2 0.3 -6.5 -4.9 -5.2 -1.6
Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	11,985 4,089 439 7,518 14,186 6,430 24,302 8,476 20,603	2.8 2.0 1.3 0.7 1.6 1.5 1.1	-2.8 -0.9 -2.0 -0.3 0.6 -0.7 0.2 -1.2 -2.3	-23.2 -13.7 -8.3 3.4 -10.7 -8.5 -9.8 -1.3 -11.6	-8.9 -4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6 -5.7	8.4 11.0 7.6 4.7 4.1 9.9 7.7 -0.3 -4.7	-0.2 0.6 0.9 2.0 -1.7 0.4 3.0 0.3 -13.9	-13.2 -8.7 -0.6 0.8 -2.2 -1.3 -2.0 2.6 -4.1	3.5 3.7 1.1 1.4 -0.3 0.1 -1.5 -0.3 -2.8	-3.3 -3.0 -3.2 0.3 -6.5 -4.9 -5.2 -1.6 -4.6
Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	11,985 4,089 439 7,518 14,186 6,430 24,302 8,476 20,603 26,660 348	2.8 2.0 1.3 0.7 1.6 1.5 1.1 1.5 3.3 0.4 1.0	-2.8 -0.9 -2.0 -0.3 0.6 -0.7 0.2 -1.2 -2.3 -0.7 -2.1	-23.2 -13.7 -8.3 3.4 -10.7 -8.5 -9.8 -1.3 -11.6 -6.6 -11.3	-8.9 -4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6 -5.7 -2.5 -6.8	8.4 11.0 7.6 4.7 4.1 9.9 7.7 -0.3 -4.7 -2.1 -0.7	-0.2 0.6 0.9 2.0 -1.7 0.4 3.0 0.3 -13.9 3.0 -8.3 Q3 21	-13.2 -8.7 -0.6 0.8 -2.2 -1.3 -2.0 2.6 -4.1 -3.5 -2.8 Apr-22	3.5 3.7 1.1 1.4 -0.3 0.1 -1.5 -0.3 -2.8 5.8 1.6	-3.3 -3.0 -3.2 0.3 -6.5 -4.9 -5.2 -1.6 -4.6 -1.7 1.0
Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI	11,985 4,089 439 7,518 14,186 6,430 24,302 8,476 20,603 26,660 348 s Latest	2.8 2.0 1.3 0.7 1.6 1.5 1.1 1.5 3.3 0.4 1.0	-2.8 -0.9 -2.0 -0.3 0.6 -0.7 0.2 -1.2 -2.3 -0.7 -2.1 MTD 6.2	-23.2 -13.7 -8.3 3.4 -10.7 -8.5 -9.8 -1.3 -11.6 -6.6 -11.3 YTD 44.7	-8.9 -4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6 -5.7 -2.5 -6.8 Q1 22 34.2	8.4 11.0 7.6 4.7 4.1 9.9 7.7 -0.3 -4.7 -2.1 -0.7	-0.2 0.6 0.9 2.0 -1.7 0.4 3.0 0.3 -13.9 3.0 -8.3 Q3 21 4.9	-13.2 -8.7 -0.6 0.8 -2.2 -1.3 -2.0 2.6 -4.1 -3.5 -2.8 Apr-22	3.5 3.7 1.1 1.4 -0.3 0.1 -1.5 -0.3 -2.8 5.8 1.6 Mar-22 6.7	-3.3 -3.0 -3.2 0.3 -6.5 -4.9 -5.2 -1.6 -4.6 -1.7 1.0 Feb-22 9.6
Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commoditie	11,985 4,089 439 7,518 14,186 6,430 24,302 8,476 20,603 26,660 348	2.8 2.0 1.3 0.7 1.6 1.5 1.1 1.5 3.3 0.4 1.0	-2.8 -0.9 -2.0 -0.3 0.6 -0.7 0.2 -1.2 -2.3 -0.7 -2.1	-23.2 -13.7 -8.3 3.4 -10.7 -8.5 -9.8 -1.3 -11.6 -6.6 -11.3	-8.9 -4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6 -5.7 -2.5 -6.8	8.4 11.0 7.6 4.7 4.1 9.9 7.7 -0.3 -4.7 -2.1 -0.7	-0.2 0.6 0.9 2.0 -1.7 0.4 3.0 0.3 -13.9 3.0 -8.3 Q3 21	-13.2 -8.7 -0.6 0.8 -2.2 -1.3 -2.0 2.6 -4.1 -3.5 -2.8 Apr-22	3.5 3.7 1.1 1.4 -0.3 0.1 -1.5 -0.3 -2.8 5.8 1.6	-3.3 -3.0 -3.2 0.3 -6.5 -4.9 -5.2 -1.6 -4.6 -1.7 1.0
Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commoditie	11,985 4,089 439 7,518 14,186 6,430 24,302 8,476 20,603 26,660 348 s Latest	2.8 2.0 1.3 0.7 1.6 1.5 1.1 1.5 3.3 0.4 1.0	-2.8 -0.9 -2.0 -0.3 0.6 -0.7 0.2 -1.2 -2.3 -0.7 -2.1 MTD 6.2	-23.2 -13.7 -8.3 3.4 -10.7 -8.5 -9.8 -1.3 -11.6 -6.6 -11.3 YTD 44.7	-8.9 -4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6 -5.7 -2.5 -6.8 Q1 22 34.2	8.4 11.0 7.6 4.7 4.1 9.9 7.7 -0.3 -4.7 -2.1 -0.7	-0.2 0.6 0.9 2.0 -1.7 0.4 3.0 0.3 -13.9 3.0 -8.3 Q3 21 4.9	-13.2 -8.7 -0.6 0.8 -2.2 -1.3 -2.0 2.6 -4.1 -3.5 -2.8 Apr-22	3.5 3.7 1.1 1.4 -0.3 0.1 -1.5 -0.3 -2.8 5.8 1.6 Mar-22 6.7	-3.3 -3.0 -3.2 0.3 -6.5 -4.9 -5.2 -1.6 -4.6 -1.7 1.0 Feb-22 9.6
Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent WTI	11,985 4,089 439 7,518 14,186 6,430 24,302 8,476 20,603 26,660 348 s Latest 112.7 113.7	2.8 2.0 1.3 0.7 1.6 1.5 1.1 1.5 3.3 0.4 1.0 1 Day -1.3 -0.2	-2.8 -0.9 -2.0 -0.3 0.6 -0.7 0.2 -1.2 -2.3 -0.7 -2.1 MTD 6.2 9.2	-23.2 -13.7 -8.3 3.4 -10.7 -8.5 -9.8 -1.3 -11.6 -6.6 -11.3 YTD 44.7 50.6	-8.9 -4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6 -5.7 -2.5 -6.8 Q1 22 34.2 34.0	8.4 11.0 7.6 4.7 4.1 9.9 7.7 -0.3 -4.7 -2.1 -0.7 Q4 21 -0.6 0.6	-0.2 0.6 0.9 2.0 -1.7 0.4 3.0 0.3 -13.9 3.0 -8.3 Q3 21 4.9 1.9	-13.2 -8.7 -0.6 0.8 -2.2 -1.3 -2.0 2.6 -4.1 -3.5 -2.8 Apr-22 1.5 3.0	3.5 3.7 1.1 1.4 -0.3 0.1 -1.5 -0.3 -2.8 5.8 1.6 Mar-22 6.7 5.5	-3.3 -3.0 -3.2 0.3 -6.5 -4.9 -5.2 -1.6 -4.6 -1.7 1.0 Feb-22 9.6 8.7
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	11,985 4,089 439 7,518 14,186 6,430 24,302 8,476 20,603 26,660 348 S Latest 112.7 113.7 2.98	2.8 2.0 1.3 0.7 1.6 1.5 1.1 1.5 3.3 0.4 1.0 1 Day -1.3 -0.2 3.5	-2.8 -0.9 -2.0 -0.3 0.6 -0.7 0.2 -1.2 -2.3 -0.7 -2.1 MTD 6.2 9.2 3.1	-23.2 -13.7 -8.3 3.4 -10.7 -8.5 -9.8 -1.3 -11.6 -6.6 -11.3 YTD 44.7 50.6 96.1	-8.9 -4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6 -5.7 -2.5 -6.8 Q1 22 34.2 34.0 52.6	8.4 11.0 7.6 4.7 4.1 9.9 7.7 -0.3 -4.7 -2.1 -0.7 Q4 21 -0.6 0.6	-0.2 0.6 0.9 2.0 -1.7 0.4 3.0 0.3 -13.9 3.0 -8.3 Q3 21 4.9 1.9 4.8	-13.2 -8.7 -0.6 0.8 -2.2 -1.3 -2.0 2.6 -4.1 -3.5 -2.8 Apr-22 1.5 3.0 24.6	3.5 3.7 1.1 1.4 -0.3 0.1 -1.5 -0.3 -2.8 5.8 1.6 Mar-22 6.7 5.5 26.8	-3.3 -3.0 -3.2 0.3 -6.5 -4.9 -5.2 -1.6 -4.6 -1.7 1.0 Feb-22 9.6 8.7 2.2

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.

For more information contact: content@eastspring.com | T: +65 6349 9100



DISCLAIMER

The general concepts shared are for educational purposes only.

The materials provided in this presentation are NOT used for the marketing or sale of any Eastspring investment products.

Readers are advised to be cautious if they intend to invest in any products that are used in the illustrations as the illustrations do not cover the full spectrum of considerations required in making an investment decision. Any investment views shared by the speaker is of his/her own and does not represent the position of Eastspring Investments Singapore or any of its affiliated companies.

This document is solely for educational information and may not be published, circulated, reproduced or distributed in whole or part to any other person.

This information is not an offer or solicitation by anyone in any jurisdiction in which such offer or solicitation is not lawful or in which the person making such offer or solicitation is not qualified to do so or to anyone to whom it is unlawful to make such an offer or solicitation. It should not be construed as an offer, solicitation of an offer, or a recommendation to transact in any securities if mentioned herein.

The information contained herein does not have any regards to the specific investment objectives, financial situation or particular needs of any person. Investors may wish to seek advice from a financial adviser before making any investment decision. In the event that investor chooses not to seek advice from a financial advisor, he should consider carefully whether the fund in question is suitable for him.

Eastspring Investments (excluding JV companies) are ultimately wholly-owned / indirect subsidiaries / associates of Prudential plc of the United Kingdom. Eastspring Investments companies (including JVs) and Prudential plc are not affiliated in any manner with Prudential Financial, Inc., a company whose principal place of business is in the United States of America or with the Prudential Assurance Company, a subsidiary of M&G plc, a company incorporated in the United Kingdom.

