STOCKS | BONDS | INTEREST RATES | COMMODITIES | CURRENCIES

아시아 증시는 금요일 전반적으로 상승 마감했습니다. 중국 증시는 경제가 팬데믹으로부터 견실한 회복세를 보일 것이라는 낙관심리 로 외국인이 8일 연속 매수세를 보이며 상승했습니다. 한국의 주가 는 미국 인플레이션 데이터가 완화된 통화 긴축을 시사하고 한국은행의 금리 인상 사이클의 마지막일 수 있는 금리 인상 이후 상승했습니다. 일본 시장은 섬유, 건설, 철도 및 버스 섹터 주도로 하락했습니다. 유럽 증시는 의료 및 은행주와 영국의 긍정적 경제 데이터로 금요일 9개월 내 최고치를 기록 하며 상승했습니다. 이탈리아 전력 유틸리티 기업 Enel은 CEO 가 REPower EU 에너지 펀드에서 투자를 위해 이미 획득한 EU 복구 자금 35억 유로에 최대 54억 달러 를 추가 확보할 수 있다고 언급 하며 주가가 0.5% 상승했습니다. 그러나 온라인 게임 기업 Kindred Group 주가는 4분기 실적 경고로 15.5% 이상 급락했습니다. 미국 증시는 은행주가 분기 실적 발표 후 오르는 등 금요일 상승세 를 보였습니다. S&P 500 주요 11개 섹터 중 8개가 에너지 주도 로 상승 마감했습니다. 소비자 물가 지수는 인플레이션의 지속적 하향 추세가 연준이 금리 인상을 완화할 수 있는 여지를 줄 수 있다 는 희망을 강화했습니다. 그러나 테슬라는 2022년 출고 예상을 하회한 후 미국과 유럽에서 전기 자동차 가격을 20%나 인하하며 1% 하락했습니다. 미 국채 금리는 연준이 올해 말에 금리를 인하할 수밖에 없다는 시장의 견해에 일부 투자자들이 주춤하며 12월 소비자 물가 하락으로 전날 하락한 이후 금요일소폭 상승했습니다.

국제 유가는 더 많은 지표가 최대 석유 수입국인 중국의 수요 증가 를 가리키며 금요일 상승하며 10월 이후 가장 큰 주간 상승폭을 기록했습니다.

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MSCI	Latest	1 Day	MTD	YTD	Q4 22	Q3 22	Q2 22	Dec-22	Nov-22	Oct-22
World	638	0.6	5.5	5.5	9.9	-6.7	-15.5	-3.9	7.8	6.1
United States	3,795	0.4	4.3	4.3	7.1	-4.7	-16.8	-5.9	5.4	7.9
Europe	1,872	0.7	8.2	8.2	19.4	-10.1	-14.2	0.0	11.4	7.2
Japan	3,280	1.4	4.5	4.5	13.3	-7.5	-14.6	0.3	9.7	3.0
Emerging Markets	1,030	1.1	7.7	7.7	9.8	-11.4	-11.3	-1.4	14.9	-3.1
Asia Pac Ex Japan	544	1.2	7.6	7.6	12.2	-12.6	-10.5	-0.4	17.6	-4.2
Asia Ex Japan	668	1.2	7.8	7.8	11.4	-13.7	-8.9	-0.1	18.8	-6.1
Australia	902	1.1	6.9	6.9	15.7	-6.7	-18.1	-2.0	12.2	5.3
Hong Kong	10,860	0.0	3.7	3.7	18.2	-17.0	-1.1	8.1	24.5	-12.2
China H	72	1.6	12.1	12.1	13.5	-22.4	3.5	5.2	29.7	-16.8
China A	2,032	1.7	8.1	8.1	4.3	-18.2	1.8	2.0	13.0	-9.5
Korea	464	1.3	10.3	10.3	18.5	-16.3	-20.8	-4.9	14.9	8.3
Taiwan	543	1.3	8.0	8.0	9.7	-14.0	-19.6	-5.4	22.2	-5.1
Thailand	417	8.0	5.6	5.6	16.1	-2.8	-10.5	3.8	10.6	1.2
Malaysia	274	1.0	1.8	1.8	14.0	-7.1	-12.8	1.8	8.8	2.9
Singapore	3,220	1.5	4.3	4.3	10.5	-1.5	-16.8	-0.9	11.5	0.0
Indonesia	772	8.0	-1.1	-1.1	-3.5	7.8	-8.8	-4.5	0.6	0.4
India	778	8.0	1.0	1.0	2.1	6.8	-13.5	-5.5	5.2	2.6
Distriction	452	2.0	8.0	0.0	21.2	40 E	-19.4	-2.1	13.4	9.1
Philippines	452	2.6	8.0	8.0		-13.5				
Local Indices	Latest	1 Day	MTD	YTD	Q4 22	Q3 22	Q2 22	Dec-22	Nov-22	Oct-22
Local Indices DJIA	Latest 34,303	1 Day 0.3	MTD 3.5	YTD 3.5	Q4 22 16.0	Q3 22 -6.2	Q2 22 -10.8	Dec-22 -4.1	Nov-22 5.6	Oct-22 14.5
Local Indices DJIA Nasdaq	Latest 34,303 11,079	1 Day 0.3 0.7	MTD 3.5 5.9	3.5 5.9	Q4 22 16.0 -0.8	-6.2 -3.9	-10.8 -22.3	-4.1 -8.7	Nov-22 5.6 4.5	Oct-22 14.5 3.9
Local Indices DJIA Nasdaq S&P 500	Latest 34,303 11,079 3,999	0.3 0.7 0.4	3.5 5.9 4.2	3.5 5.9 4.2	Q4 22 16.0 -0.8 7.6	-6.2 -3.9 -4.9	-10.8 -22.3 -16.1	-4.1 -8.7 -5.8	5.6 4.5 5.6	Oct-22 14.5 3.9 8.1
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600	Latest 34,303 11,079 3,999 453	0.3 0.7 0.4 0.5	3.5 5.9 4.2 6.6	3.5 5.9 4.2 6.6	Q4 22 16.0 -0.8 7.6 9.9	-6.2 -3.9 -4.9 -4.3	Q2 22 -10.8 -22.3 -16.1 -9.2	Dec-22 -4.1 -8.7 -5.8 -3.4	5.6 4.5 5.6 6.9	Oct-22 14.5 3.9 8.1 6.4
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100	Latest 34,303 11,079 3,999 453 7,844	0.3 0.7 0.4 0.5 0.6	MTD 3.5 5.9 4.2 6.6 5.3	3.5 5.9 4.2 6.6 5.3	Q4 22 16.0 -0.8 7.6 9.9 8.7	-6.2 -3.9 -4.9 -4.3 -2.7	Q2 22 -10.8 -22.3 -16.1 -9.2 -3.7	-4.1 -8.7 -5.8 -3.4 -1.5	Nov-22 5.6 4.5 5.6 6.9 7.1	Oct-22 14.5 3.9 8.1 6.4 3.0
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX	Latest 34,303 11,079 3,999 453 7,844 15,087	1 Day 0.3 0.7 0.4 0.5 0.6 0.2	MTD 3.5 5.9 4.2 6.6 5.3 8.4	3.5 5.9 4.2 6.6 5.3 8.4	Q4 22 16.0 -0.8 7.6 9.9 8.7 14.9	-6.2 -3.9 -4.9 -4.3 -2.7 -5.2	Q2 22 -10.8 -22.3 -16.1 -9.2 -3.7 -11.3	-4.1 -8.7 -5.8 -3.4 -1.5 -3.3	Nov-22 5.6 4.5 5.6 6.9 7.1 8.6	Oct-22 14.5 3.9 8.1 6.4 3.0 9.4
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40	Latest 34,303 11,079 3,999 453 7,844 15,087 7,024	1 Day 0.3 0.7 0.4 0.5 0.6 0.2 0.7	MTD 3.5 5.9 4.2 6.6 5.3 8.4 8.6	3.5 5.9 4.2 6.6 5.3 8.4 8.6	16.0 -0.8 7.6 9.9 8.7 14.9 12.6	-6.2 -3.9 -4.9 -4.3 -2.7 -5.2 -2.5	Q2 22 -10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9	Dec-22 -4.1 -8.7 -5.8 -3.4 -1.5 -3.3 -3.8	5.6 4.5 5.6 6.9 7.1 8.6 7.6	Oct-22 14.5 3.9 8.1 6.4 3.0 9.4 8.8
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB	25,783	1 Day 0.3 0.7 0.4 0.5 0.6 0.2 0.7 0.2	MTD 3.5 5.9 4.2 6.6 5.3 8.4 8.6 8.8	3.5 5.9 4.2 6.6 5.3 8.4 8.6 8.8	Q4 22 16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6	-6.2 -3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -2.4	Q2 22 -10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5	-4.1 -8.7 -5.8 -3.4 -1.5 -3.3 -3.8 -3.7	Nov-22 5.6 4.5 5.6 6.9 7.1 8.6 7.6 9.4	Oct-22 14.5 3.9 8.1 6.4 3.0 9.4 8.8 9.7
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35	25,783 8,882	1 Day 0.3 0.7 0.4 0.5 0.6 0.2 0.7 0.2 0.6	MTD 3.5 5.9 4.2 6.6 5.3 8.4 8.6 8.8 8.4	3.5 5.9 4.2 6.6 5.3 8.4 8.6 8.8 8.4	Q4 22 16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8	-6.2 -3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -2.4 -8.3	Q2 22 -10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7	Dec-22 -4.1 -8.7 -5.8 -3.4 -1.5 -3.3 -3.8 -3.7 -1.3	5.6 4.5 5.6 6.9 7.1 8.6 7.6 9.4 5.3	Oct-22 14.5 3.9 8.1 6.4 3.0 9.4 8.8 9.7 8.5
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	21,739 Latest 34,303 11,079 3,999 453 7,844 15,087 7,024 25,783 8,882 21,739	1 Day 0.3 0.7 0.4 0.5 0.6 0.2 0.7 0.2 0.6 1.0	MTD 3.5 5.9 4.2 6.6 5.3 8.4 8.6 8.8 8.4 9.9	3.5 5.9 4.2 6.6 5.3 8.4 8.6 8.8 8.4 9.9	Q4 22 16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0	-6.2 -3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -2.4 -8.3 -20.1	Q2 22 -10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9	-4.1 -8.7 -5.8 -3.4 -1.5 -3.3 -3.8 -3.7 -1.3 6.4	Nov-22 5.6 4.5 5.6 6.9 7.1 8.6 7.6 9.4 5.3 26.8	Oct-22 14.5 3.9 8.1 6.4 3.0 9.4 8.8 9.7 8.5 -14.7
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	21,739 26,120	1 Day 0.3 0.7 0.4 0.5 0.6 0.2 0.7 0.2 0.6 1.0 -1.2	MTD 3.5 5.9 4.2 6.6 5.3 8.4 8.6 8.8 8.4 9.9 0.1	3.5 5.9 4.2 6.6 5.3 8.4 8.6 8.8 8.4 9.9 0.1	Q4 22 16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8	-6.2 -3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -2.4 -8.3 -20.1 -0.8	Q2 22 -10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9 -4.9	-4.1 -8.7 -5.8 -3.4 -1.5 -3.3 -3.8 -3.7 -1.3 6.4 -6.5	Nov-22 5.6 4.5 5.6 6.9 7.1 8.6 7.6 9.4 5.3 26.8 1.4	Oct-22 14.5 3.9 8.1 6.4 3.0 9.4 8.8 9.7 8.5 -14.7 6.4
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI	Latest 34,303 11,079 3,999 453 7,844 15,087 7,024 25,783 8,882 21,739 26,120 314	1 Day 0.3 0.7 0.4 0.5 0.6 0.2 0.7 0.2 0.6 1.0 -1.2 1.0	3.5 5.9 4.2 6.6 5.3 8.4 8.6 8.8 8.4 9.9 0.1 7.8	3.5 5.9 4.2 6.6 5.3 8.4 8.6 8.8 8.4 9.9 0.1 7.8	Q4 22 16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8 5.3	-6.2 -3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -2.4 -8.3 -20.1 -0.8 -8.1	Q2 22 -10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9 -4.9 -15.7	Dec-22 -4.1 -8.7 -5.8 -3.4 -1.5 -3.3 -3.8 -3.7 -1.3 6.4 -6.5 -7.8	Nov-22 5.6 4.5 5.6 6.9 7.1 8.6 7.6 9.4 5.3 26.8 1.4 7.1	Oct-22 14.5 3.9 8.1 6.4 3.0 9.4 8.8 9.7 8.5 -14.7 6.4 6.5
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities	Latest 34,303 11,079 3,999 453 7,844 15,087 7,024 25,783 8,882 21,739 26,120 314 Latest	1 Day 0.3 0.7 0.4 0.5 0.6 0.2 0.7 0.2 0.6 1.0 -1.2 1.0	MTD 3.5 5.9 4.2 6.6 5.3 8.4 8.6 8.8 8.4 9.9 0.1 7.8	3.5 5.9 4.2 6.6 5.3 8.4 8.6 8.8 8.4 9.9 0.1 7.8	Q4 22 16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8 5.3	Q3 22 -6.2 -3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -2.4 -8.3 -20.1 -0.8 -8.1 Q3 22	Q2 22 -10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9 -4.9 -15.7	Dec-22 -4.1 -8.7 -5.8 -3.4 -1.5 -3.3 -3.8 -3.7 -1.3 6.4 -6.5 -7.8 Dec-22	Nov-22 5.6 4.5 5.6 6.9 7.1 8.6 7.6 9.4 5.3 26.8 1.4 7.1 Nov-22	Oct-22 14.5 3.9 8.1 6.4 3.0 9.4 8.8 9.7 8.5 -14.7 6.4 6.5 Oct-22
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent	Latest 34,303 11,079 3,999 453 7,844 15,087 7,024 25,783 8,882 21,739 26,120 314 Latest 85.3	1 Day 0.3 0.7 0.4 0.5 0.6 0.2 0.7 0.2 0.6 1.0 -1.2 1.0 1 Day 1.7	MTD 3.5 5.9 4.2 6.6 5.3 8.4 8.6 8.8 8.4 9.9 0.1 7.8 MTD -0.8	3.5 5.9 4.2 6.6 5.3 8.4 8.6 8.8 8.4 9.9 0.1 7.8 YTD	Q4 22 16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8 5.3 Q4 22 -2.2	-6.2 -3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -2.4 -8.3 -20.1 -0.8 -8.1 -23.22 -20.3	Q2 22 -10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9 -4.9 -15.7 Q2 22 5.7	Dec-22 -4.1 -8.7 -5.8 -3.4 -1.5 -3.3 -3.8 -3.7 -1.3 6.4 -6.5 -7.8 Dec-22 0.7	Nov-22 5.6 4.5 5.6 6.9 7.1 8.6 7.6 9.4 5.3 26.8 1.4 7.1 Nov-22 -9.2	Oct-22 14.5 3.9 8.1 6.4 3.0 9.4 8.8 9.7 8.5 -14.7 6.4 6.5 Oct-22 7.0
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent WTI	Latest 34,303 11,079 3,999 453 7,844 15,087 7,024 25,783 8,882 21,739 26,120 314 Latest 85.3 79.9	1 Day 0.3 0.7 0.4 0.5 0.6 0.2 0.7 0.2 0.6 1.0 -1.2 1.0 1 Day 1.7 2.0	MTD 3.5 5.9 4.2 6.6 5.3 8.4 8.6 8.8 8.4 9.9 0.1 7.8 MTD -0.8 -0.8	3.5 5.9 4.2 6.6 5.3 8.4 8.6 8.8 8.4 9.9 0.1 7.8 YTD -0.8 -0.8	Q4 22 16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8 5.3 Q4 22 -2.2 -1.5	-6.2 -3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -2.4 -8.3 -20.1 -0.8 -8.1 -20.3 -20.3 -24.0	Q2 22 -10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9 -4.9 -15.7 Q2 22 5.7 6.3	Dec-22 -4.1 -8.7 -5.8 -3.4 -1.5 -3.3 -3.8 -3.7 -1.3 6.4 -6.5 -7.8 Dec-22 0.7 0.0	Nov-22 5.6 4.5 5.6 6.9 7.1 8.6 7.6 9.4 5.3 26.8 1.4 7.1 Nov-22 -9.2 -6.5	Oct-22 14.5 3.9 8.1 6.4 3.0 9.4 8.8 9.7 8.5 -14.7 6.4 6.5 Oct-22 7.0 5.4
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent	Latest 34,303 11,079 3,999 453 7,844 15,087 7,024 25,783 8,882 21,739 26,120 314 Latest 85.3 79.9 3.49	1 Day 0.3 0.7 0.4 0.5 0.6 0.2 0.7 0.2 0.6 1.0 -1.2 1.0 1 Day 1.7 2.0 1.7	MTD 3.5 5.9 4.2 6.6 5.3 8.4 8.6 8.8 8.4 9.9 0.1 7.8 MTD -0.8 -0.8 -10.1	3.5 5.9 4.2 6.6 5.3 8.4 8.6 8.8 8.4 9.9 0.1 7.8 YTD -0.8 -0.8	Q4 22 16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8 5.3 Q4 22 -2.2 -1.5 1.3	-6.2 -3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -2.4 -8.3 -20.1 -0.8 -8.1 -20.3 -24.0 28.5	Q2 22 -10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9 -4.9 -15.7 Q2 22 5.7 6.3 28.4	Dec-22 -4.1 -8.7 -5.8 -3.4 -1.5 -3.3 -3.8 -3.7 -1.3 6.4 -6.5 -7.8 Dec-22 0.7 0.0 5.4	Nov-22 5.6 4.5 5.6 6.9 7.1 8.6 7.6 9.4 5.3 26.8 1.4 7.1 Nov-22 -9.2 -6.5 -10.2	Oct-22 14.5 3.9 8.1 6.4 3.0 9.4 8.8 9.7 8.5 -14.7 6.4 6.5 Oct-22 7.0 5.4 7.0
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent WTI	Latest 34,303 11,079 3,999 453 7,844 15,087 7,024 25,783 8,882 21,739 26,120 314 Latest 85.3 79.9	1 Day 0.3 0.7 0.4 0.5 0.6 0.2 0.7 0.2 0.6 1.0 -1.2 1.0 1 Day 1.7 2.0	MTD 3.5 5.9 4.2 6.6 5.3 8.4 8.6 8.8 8.4 9.9 0.1 7.8 MTD -0.8 -0.8	3.5 5.9 4.2 6.6 5.3 8.4 8.6 8.8 8.4 9.9 0.1 7.8 YTD -0.8 -0.8	Q4 22 16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8 5.3 Q4 22 -2.2 -1.5	-6.2 -3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -2.4 -8.3 -20.1 -0.8 -8.1 -20.3 -20.3 -24.0	Q2 22 -10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9 -4.9 -15.7 Q2 22 5.7 6.3	Dec-22 -4.1 -8.7 -5.8 -3.4 -1.5 -3.3 -3.8 -3.7 -1.3 6.4 -6.5 -7.8 Dec-22 0.7 0.0	Nov-22 5.6 4.5 5.6 6.9 7.1 8.6 7.6 9.4 5.3 26.8 1.4 7.1 Nov-22 -9.2 -6.5	Oct-22 14.5 3.9 8.1 6.4 3.0 9.4 8.8 9.7 8.5 -14.7 6.4 6.5 Oct-22 7.0 5.4

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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