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아시아 증시는 금요일 상승 마감 했습니다. 중국 증시는 미국 은행들이 타지역 은행을 구제하기 위해 움직이며 글로벌 증시 상승세를 추적하면서 상승했고 투자자들도 중국의 경제 회복 조짐에 긍정적으로 반응했습니다. 한국의 주가는 반도체 기업의 상승이 배터리 기업하락을 상회하면서 상승했습니다. 일본 시장은 미국 Silicon Valley Bank 및 스위스 은행 Credit Suisse Group의 위기에 대한 우려 완화가심리를 뒷받침하면서 은행 및 전자주도로 상승했습니다.

유럽 증시는 Credit Suisse와 First Republic Bank가 은행 섹터 위기를 예방하기 위해 고안된 재정 지원을 받을 것이라는 발표에도 불구하고 금요일 하락하며 격동의 한 주를 마감했습니다. 은행주가 손실을 주도했고 금융 서비스가 각각 2% 이상 하락하는 가운데 모든 섹터 및 주요 증시는 상승했습니다. First Republic의 주가는 약 18% 하락하며 국내 최대 은행들이 발표한 300억 달러 예금 계획으로 촉발된 오후 랠리를 상쇄했습니다.

미국 증시는 은행 섹터 위기 전개와 경기 침체 가능성의 먹구름이 몰려드는 격동의 한 주를 마감하며 금요일 하락했습니다. S&P 500 주요 11개 섹터 중 4개는 에너지 주도로 하락했습니다. Sarepta Therapeutics는 규제 당국이 Duchene 근육 위축병에 대한 SRP-9001 치료제에 대한 자문위원회회의를 가질 것이라고 발표한 후 20% 가까이 하락했습니다. FedEx는 회계연도 3분기 실적 기대치를 상회하며 8% 이상 급등했습니다.

미국채 금리는 투자자들이 주식 시장에 대한 전망을 저울질하고 연준의 다음 정책 움직임에 주목 하면서 금요일 하락했습니다.

국제 유가는 은행권이 몇 달 만에 최대 주간 하락폭을 기록할 것 이라는 우려로 금요일 배럴당 1달러 이상의 초반 상승을 반전 시키며 배럴당 3달러 이상 하락 했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q4 22	Q3 22	Q2 22	Feb-23	Jan-23	Dec-22
World	616	-0.6	-1.9	2.2	9.9	-6.7	-15.5	-2.8	7.2	-3.9
United States	3,720	-1.1	-1.4	2.6	7.1	-4.7	-16.8	-2.4	6.6	-5.9
Europe	1,776	-1.0	-4.5	3.1	19.4	-10.1	-14.2	-0.6	8.7	0.0
Japan	3,248	1.9	1.4	3.5	13.3	-7.5	-14.6	-3.8	6.2	0.3
Emerging Markets	952	1.1	-1.1	-0.2	9.8	-11.4	-11.3	-6.5	7.9	-1.4
Asia Pac Ex Japan	506	1.5	-0.8	0.5	12.2	-12.6	-10.5	-6.8	8.6	-0.4
Asia Ex Japan	622	1.6	-0.2	0.6	11.4	-13.7	-8.9	-6.8	8.2	-0.1
Australia	830	0.9	-3.4	0.0	15.7	-6.7	-18.1	-6.6	10.7	-2.0
Hong Kong	9,953	1.8	-1.0	-4.5	18.2	-17.0	-1.1	-7.1	3.8	8.1
China H	64	1.4	-0.8	-0.6	13.5	-22.4	3.5	-10.4	11.8	5.2
China A	1,913	0.4	-2.7	1.8	4.3	-18.2	1.8	-4.4	9.5	2.0
Korea	445	2.1	1.3	5.9	18.5	-16.3	-20.8	-7.0	12.4	-4.9
Taiwan	560	2.0	0.2	11.6	9.7	-14.0	-19.6	-1.1	12.7	-5.4
Thailand	373	1.3	1.0	-4.8	16.1	-2.8	-10.5	-9.2	3.8	3.8
Malaysia	250	1.9	-1.6	-6.1	14.0	-7.1	-12.8	-7.2	2.9	1.8
Singapore	3,154	1.1	0.5	2.4	10.5	-1.5	-16.8	-5.1	7.5	-0.9
Indonesia	782	2.1	-2.1	0.2	-3.5	7.8	-8.8	-1.0	3.3	-4.5
India	709	8.0	-0.5	-7.8	2.1	6.8	-13.5	-4.5	-3.0	-5.5
Philippines	419	1.5	0.9	0.9	21.2	-13.5	-19.4	-5.1	5.4	-2.1
	Latest	1 Day	MTD	YTD	Q4 22	Q3 22	Q2 22	Feb-23	Jan-23	Dec-22
Local Indices DJIA	31,862	-1.2	-2.2	-3.4	16.0	-6.2	-10.8	-3.9	2.9	-4.1
DJIA Nasdaq	31,862 11,631	-1.2 -0.7	-2.2 1.6	-3.4 11.4	16.0 -0.8	-6.2 -3.9	-10.8 -22.3	-3.9 -1.0	2.9 10.7	-4.1 -8.7
DJIA Nasdaq S&P 500	31,862 11,631 3,917	-1.2 -0.7 -1.1	-2.2 1.6 -1.2	-3.4 11.4 2.4	16.0 -0.8 7.6	-6.2 -3.9 -4.9	-10.8 -22.3 -16.1	-3.9 -1.0 -2.4	2.9 10.7 6.3	-4.1 -8.7 -5.8
DJIA Nasdaq S&P 500 Euro Stoxx 600	31,862 11,631 3,917 436	-1.2 -0.7 -1.1 -1.2	-2.2 1.6 -1.2 -5.1	-3.4 11.4 2.4 3.2	16.0 -0.8 7.6 9.9	-6.2 -3.9 -4.9 -4.3	-10.8 -22.3 -16.1 -9.2	-3.9 -1.0 -2.4 1.9	2.9 10.7 6.3 6.8	-4.1 -8.7 -5.8 -3.4
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100	31,862 11,631 3,917 436 7,335	-1.2 -0.7 -1.1 -1.2 -1.0	-2.2 1.6 -1.2 -5.1 -6.4	-3.4 11.4 2.4 3.2 -0.6	16.0 -0.8 7.6 9.9 8.7	-6.2 -3.9 -4.9 -4.3 -2.7	-10.8 -22.3 -16.1 -9.2 -3.7	-3.9 -1.0 -2.4 1.9 1.8	2.9 10.7 6.3 6.8 4.3	-4.1 -8.7 -5.8 -3.4 -1.5
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX	31,862 11,631 3,917 436 7,335 14,768	-1.2 -0.7 -1.1 -1.2 -1.0	-2.2 1.6 -1.2 -5.1 -6.4 -3.9	-3.4 11.4 2.4 3.2 -0.6 6.1	16.0 -0.8 7.6 9.9 8.7 14.9	-6.2 -3.9 -4.9 -4.3 -2.7 -5.2	-10.8 -22.3 -16.1 -9.2 -3.7 -11.3	-3.9 -1.0 -2.4 1.9 1.8 1.6	2.9 10.7 6.3 6.8 4.3 8.7	-4.1 -8.7 -5.8 -3.4 -1.5
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40	31,862 11,631 3,917 436 7,335 14,768 6,925	-1.2 -0.7 -1.1 -1.2 -1.0 -1.3 -1.4	-2.2 1.6 -1.2 -5.1 -6.4 -3.9 -4.7	-3.4 11.4 2.4 3.2 -0.6 6.1 7.1	16.0 -0.8 7.6 9.9 8.7 14.9	-6.2 -3.9 -4.9 -4.3 -2.7 -5.2 -2.5	-10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9	-3.9 -1.0 -2.4 1.9 1.8 1.6 2.6	2.9 10.7 6.3 6.8 4.3 8.7 9.6	-4.1 -8.7 -5.8 -3.4 -1.5 -3.3 -3.8
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB	31,862 11,631 3,917 436 7,335 14,768 6,925 25,495	-1.2 -0.7 -1.1 -1.2 -1.0 -1.3 -1.4 -1.6	-2.2 1.6 -1.2 -5.1 -6.4 -3.9 -4.7 -7.2	-3.4 11.4 2.4 3.2 -0.6 6.1 7.1 8.0	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	-10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5	-3.9 -1.0 -2.4 1.9 1.8 1.6 2.6 3.3	2.9 10.7 6.3 6.8 4.3 8.7 9.6 12.7	-4.1 -8.7 -5.8 -3.4 -1.5 -3.3 -3.8 -3.7
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35	31,862 11,631 3,917 436 7,335 14,768 6,925 25,495 8,719	-1.2 -0.7 -1.1 -1.2 -1.0 -1.3 -1.4 -1.6 -1.9	-2.2 1.6 -1.2 -5.1 -6.4 -3.9 -4.7 -7.2	-3.4 11.4 2.4 3.2 -0.6 6.1 7.1 8.0 6.4	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 -8.3	-10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7	-3.9 -1.0 -2.4 1.9 1.8 1.6 2.6 3.3 4.0	2.9 10.7 6.3 6.8 4.3 8.7 9.6 12.7	-4.1 -8.7 -5.8 -3.4 -1.5 -3.3 -3.8 -3.7 -1.3
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	31,862 11,631 3,917 436 7,335 14,768 6,925 25,495 8,719 19,519	-1.2 -0.7 -1.1 -1.2 -1.0 -1.3 -1.4 -1.6 -1.9	-2.2 1.6 -1.2 -5.1 -6.4 -3.9 -4.7 -7.2 -7.2 -1.0	-3.4 11.4 2.4 3.2 -0.6 6.1 7.1 8.0 6.4 -1.0	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 -20.1	-10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9	-3.9 -1.0 -2.4 1.9 1.8 1.6 2.6 3.3 4.0 -9.4	2.9 10.7 6.3 6.8 4.3 8.7 9.6 12.7 10.3 10.4	-4.1 -8.7 -5.8 -3.4 -1.5 -3.3 -3.8 -3.7 -1.3 6.4
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	31,862 11,631 3,917 436 7,335 14,768 6,925 25,495 8,719 19,519 27,334	-1.2 -0.7 -1.1 -1.2 -1.0 -1.3 -1.4 -1.6 -1.9 1.6	-2.2 1.6 -1.2 -5.1 -6.4 -3.9 -4.7 -7.2 -7.2 -1.0 -0.4	-3.4 11.4 2.4 3.2 -0.6 6.1 7.1 8.0 6.4 -1.0 4.8	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	-10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9 -4.9	-3.9 -1.0 -2.4 1.9 1.8 1.6 2.6 3.3 4.0 -9.4	2.9 10.7 6.3 6.8 4.3 8.7 9.6 12.7 10.3 10.4	-4.1 -8.7 -5.8 -3.4 -1.5 -3.3 -3.8 -3.7 -1.3 6.4 -6.5
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	31,862 11,631 3,917 436 7,335 14,768 6,925 25,495 8,719 19,519	-1.2 -0.7 -1.1 -1.2 -1.0 -1.3 -1.4 -1.6 -1.9	-2.2 1.6 -1.2 -5.1 -6.4 -3.9 -4.7 -7.2 -7.2 -1.0	-3.4 11.4 2.4 3.2 -0.6 6.1 7.1 8.0 6.4 -1.0	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 -20.1	-10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9	-3.9 -1.0 -2.4 1.9 1.8 1.6 2.6 3.3 4.0 -9.4	2.9 10.7 6.3 6.8 4.3 8.7 9.6 12.7 10.3 10.4	-4.1 -8.7 -5.8 -3.4 -1.5 -3.3 -3.8 -3.7 -1.3 6.4
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	31,862 11,631 3,917 436 7,335 14,768 6,925 25,495 8,719 19,519 27,334	-1.2 -0.7 -1.1 -1.2 -1.0 -1.3 -1.4 -1.6 -1.9 1.6	-2.2 1.6 -1.2 -5.1 -6.4 -3.9 -4.7 -7.2 -7.2 -1.0 -0.4	-3.4 11.4 2.4 3.2 -0.6 6.1 7.1 8.0 6.4 -1.0 4.8	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	-10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9 -4.9	-3.9 -1.0 -2.4 1.9 1.8 1.6 2.6 3.3 4.0 -9.4	2.9 10.7 6.3 6.8 4.3 8.7 9.6 12.7 10.3 10.4	-4.1 -8.7 -5.8 -3.4 -1.5 -3.3 -3.8 -3.7 -1.3 6.4 -6.5
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI	31,862 11,631 3,917 436 7,335 14,768 6,925 25,495 8,719 19,519 27,334 312	-1.2 -0.7 -1.1 -1.2 -1.0 -1.3 -1.4 -1.6 -1.9 1.6 1.2	-2.2 1.6 -1.2 -5.1 -6.4 -3.9 -4.7 -7.2 -7.2 -1.0 -0.4 -1.3	-3.4 11.4 2.4 3.2 -0.6 6.1 7.1 8.0 6.4 -1.0 4.8 8.6	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	-10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9 -4.9 -15.7	-3.9 -1.0 -2.4 1.9 1.8 1.6 2.6 3.3 4.0 -9.4 0.5	2.9 10.7 6.3 6.8 4.3 8.7 9.6 12.7 10.3 10.4 4.7 9.5	-4.1 -8.7 -5.8 -3.4 -1.5 -3.3 -3.8 -3.7 -1.3 6.4 -6.5 -7.8
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities	31,862 11,631 3,917 436 7,335 14,768 6,925 25,495 8,719 19,519 27,334 312 Latest	-1.2 -0.7 -1.1 -1.2 -1.0 -1.3 -1.4 -1.6 -1.9 1.6 1.2 1.2	-2.2 1.6 -1.2 -5.1 -6.4 -3.9 -4.7 -7.2 -7.2 -1.0 -0.4 -1.3	-3.4 11.4 2.4 3.2 -0.6 6.1 7.1 8.0 6.4 -1.0 4.8 8.6	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	-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	-3.9 -1.0 -2.4 1.9 1.8 1.6 2.6 3.3 4.0 -9.4 0.5 0.4	2.9 10.7 6.3 6.8 4.3 8.7 9.6 12.7 10.3 10.4 4.7 9.5	-4.1 -8.7 -5.8 -3.4 -1.5 -3.3 -3.8 -3.7 -1.3 6.4 -6.5 -7.8
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent	31,862 11,631 3,917 436 7,335 14,768 6,925 25,495 8,719 19,519 27,334 312 Latest	-1.2 -0.7 -1.1 -1.2 -1.0 -1.3 -1.4 -1.6 -1.9 1.6 1.2 1.2	-2.2 1.6 -1.2 -5.1 -6.4 -3.9 -4.7 -7.2 -7.2 -1.0 -0.4 -1.3 MTD	-3.4 11.4 2.4 3.2 -0.6 6.1 7.1 8.0 6.4 -1.0 4.8 8.6 YTD	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	-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 -20.3	-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	-3.9 -1.0 -2.4 1.9 1.8 1.6 2.6 3.3 4.0 -9.4 0.5 0.4 Feb-23	2.9 10.7 6.3 6.8 4.3 8.7 9.6 12.7 10.3 10.4 4.7 9.5 Jan-23	-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
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	31,862 11,631 3,917 436 7,335 14,768 6,925 25,495 8,719 19,519 27,334 312 Latest 73.1 66.9	-1.2 -0.7 -1.1 -1.2 -1.0 -1.3 -1.4 -1.6 -1.9 1.6 1.2 1.2 1 Day	-2.2 1.6 -1.2 -5.1 -6.4 -3.9 -4.7 -7.2 -7.2 -1.0 -0.4 -1.3 MTD -12.5 -13.1	-3.4 11.4 2.4 3.2 -0.6 6.1 7.1 8.0 6.4 -1.0 4.8 8.6 YTD -15.0 -16.9	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 Q3 22 -20.3 -24.0	-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	-3.9 -1.0 -2.4 1.9 1.8 1.6 2.6 3.3 4.0 -9.4 0.5 0.4 Feb-23 -2.9 -2.8	2.9 10.7 6.3 6.8 4.3 8.7 9.6 12.7 10.3 10.4 4.7 9.5 Jan-23	-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

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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