Daily Bulletin



A Prudential plc company

21 March 2023

STOCKS | BONDS | INTEREST RATES | COMMODITIES | CURRENCIES

아시아 증시는 대체로 하락 마감 했습니다. 중국 증시는 스위스 은행 Credit Suisse에 대한 주말의 구제 합의 이후 새로운 통화 완화 조치가 글로벌 은행 위기에 대한 우려를 상쇄하며 상승했습니다. 한국의 주가는 스위스 은행 Credit Suisse 인수 거래가 글로벌 시장을 진정 시키기 위해 서둘러 설계되었음에도 불구하고 투자자들이 신중한 자세를 유지하면서 하락했습니다. 일본 시장은 경기 침체와 잠재적인 글로벌 은행 섹터 위기 우려로 하락했고, Mitsubishi UFJ Financial Group은 2% 하락했습니다.

유럽 증시는 UBS가 Credit Suisse 를 시가의 일부에 인수하겠다는 급작스런 딜로 은행주가 반등하며 상승 마감했습니다. 3% 오른 광업주가 상승을 주도했습니다. UBS는 Credit Suisse를 미화 32.5억 달러에 인수하기로 한 합의와 글로벌 시장에 대한 연쇄 효과, 주주 및 채권 보유자에 대한 영향으로 5% 이상 상승했습니다. 그러나 Credit Suisse는 UBS가 희망 금액을 은행에 지불하고 최대 54억 달러의 손실을 감수하겠다고 말한 후 55% 이상 폭락했습니다.

미국 증시는 Credit Suisse를 구제하기 위한 달과 금융 시스템에 대한 신뢰를 강화하기 위한 중앙은행의노력이 투자자들을 안심시켰고시장 참가자들도 연준의 금리 인상중단 가능성에 무게를 두면서 상승했습니다. 모든 S&P 500 11개 주요섹터는 에너지 주도로 상승 마감했습니다. PacWest Bancorp는예금 유출이 안정화된 후 9% 이상상승했으며 New York Community Bancorp는 Signature Bank로부터예금과 대출을 매수하기로 합의한후 약 24% 상승했습니다.

미 국채 금리는 투자자들이 Credit Suisse 인수와 중앙은행의 유동성 확보 조치로 연준(Fed)이 금리 인상을 중단할지 여부에 주목 하면서 우려가 완화되며 상승 했습니다.

국제 유가는 세계 은행 섹터의 리스크가 연료 수요를 약화시킬 경기 침체를 촉발할 수 있다고 시장이 우려하며 15개월 최저치 에서 반등했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q4 22	Q3 22	Q2 22	Feb-23	Jan-23	Dec-22
World	620	0.6	-1.3	2.8	9.9	-6.7	-15.5	-2.8	7.2	-3.9
United States	3,752	0.9	-0.5	3.5	7.1	-4.7	-16.8	-2.4	6.6	-5.9
Europe	1,806	1.7	-2.9	4.9	19.4	-10.1	-14.2	-0.6	8.7	0.0
Japan	3,212	-1.1	0.2	2.4	13.3	-7.5	-14.6	-3.8	6.2	0.3
Emerging Markets	943	-0.9	-2.0	-1.1	9.8	-11.4	-11.3	-6.5	7.9	-1.4
Asia Pac Ex Japan	499	-1.3	-2.1	-0.8	12.2	-12.6	-10.5	-6.8	8.6	-0.4
Asia Ex Japan	613	-1.4	-1.6	-0.8	11.4	-13.7	-8.9	-6.8	8.2	-0.1
Australia	822	-1.0	-4.3	-1.1	15.7	-6.7	-18.1	-6.6	10.7	-2.0
Hong Kong	9,721	-2.3	-3.3	-6.7	18.2	-17.0	-1.1	-7.1	3.8	8.1
China H	62	-1.9	-2.6	-2.5	13.5	-22.4	3.5	-10.4	11.8	5.2
China A	1,908	-0.3	-3.0	1.6	4.3	-18.2	1.8	-4.4	9.5	2.0
Korea	438	-1.6	-0.3	4.2	18.5	-16.3	-20.8	-7.0	12.4	-4.9
Taiwan	556	-0.8	-0.6	10.8	9.7	-14.0	-19.6	-1.1	12.7	-5.4
Thailand	372	-0.3	0.7	-5.1	16.1	-2.8	-10.5	-9.2	3.8	3.8
Malaysia	248	-0.7	-2.3	-6.8	14.0	-7.1	-12.8	-7.2	2.9	1.8
Singapore	3,116	-1.2	-0.7	1.2	10.5	-1.5	-16.8	-5.1	7.5	-0.9
Indonesia	778	-0.5	-2.6	-0.3	-3.5	7.8	-8.8	-1.0	3.3	-4.5
India	703	-0.8	-1.2	-8.5	2.1	6.8	-13.5	-4.5	-3.0	-5.5
Philippines	419	-0.1	0.8	0.8	21.2	-13.5	-19.4	-5.1	5.4	-2.1
					0400	02.22	02.22			
Local Indices	Latest	1 Day	MTD	YTD	Q4 22	Q3 22	Q2 22	Feb-23	Jan-23	Dec-22
DJIA	Latest 32,245	1.2	-1.1	-2.2	16.0	-6.2	-10.8	-3.9	2.9	-4.1
DJIA Nasdaq	32,245 11,676	1.2 0.4	-1.1 2.0	-2.2 11.8	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	32,245 11,676 3,952	1.2 0.4 0.9	-1.1 2.0 -0.4	-2.2 11.8 3.3	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	32,245 11,676	1.2 0.4	-1.1 2.0 -0.4 -4.2	-2.2 11.8	16.0 -0.8 7.6 9.9	-6.2 -3.9	-10.8 -22.3 -16.1 -9.2	-3.9 -1.0	2.9 10.7	-4.1 -8.7
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100	32,245 11,676 3,952 441 7,404	1.2 0.4 0.9 1.0 0.9	-1.1 2.0 -0.4 -4.2 -5.6	-2.2 11.8 3.3 4.2 0.3	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	32,245 11,676 3,952 441 7,404 14,933	1.2 0.4 0.9 1.0 0.9 1.1	-1.1 2.0 -0.4 -4.2 -5.6 -2.8	-2.2 11.8 3.3 4.2 0.3 7.3	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	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	32,245 11,676 3,952 441 7,404 14,933 7,013	1.2 0.4 0.9 1.0 0.9 1.1 1.3	-1.1 2.0 -0.4 -4.2 -5.6 -2.8 -3.5	-2.2 11.8 3.3 4.2 0.3 7.3 8.5	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	32,245 11,676 3,952 441 7,404 14,933 7,013 25,900	1.2 0.4 0.9 1.0 0.9 1.1 1.3	-1.1 2.0 -0.4 -4.2 -5.6 -2.8 -3.5 -5.6	-2.2 11.8 3.3 4.2 0.3 7.3 8.5 9.9	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	-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	-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 Ibex 35	32,245 11,676 3,952 441 7,404 14,933 7,013 25,900 8,833	1.2 0.4 0.9 1.0 0.9 1.1 1.3 1.7	-1.1 2.0 -0.4 -4.2 -5.6 -2.8 -3.5 -5.6 -6.0	-2.2 11.8 3.3 4.2 0.3 7.3 8.5 9.9 7.8	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 10.3	-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	32,245 11,676 3,952 441 7,404 14,933 7,013 25,900	1.2 0.4 0.9 1.0 0.9 1.1 1.3 1.7 1.3 -2.7	-1.1 2.0 -0.4 -4.2 -5.6 -2.8 -3.5 -5.6 -6.0 -3.6	-2.2 11.8 3.3 4.2 0.3 7.3 8.5 9.9 7.8 -3.6	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	-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	32,245 11,676 3,952 441 7,404 14,933 7,013 25,900 8,833 19,001 26,946	1.2 0.4 0.9 1.0 0.9 1.1 1.3 1.7 1.3 -2.7 -1.4	-1.1 2.0 -0.4 -4.2 -5.6 -2.8 -3.5 -5.6 -6.0 -3.6 -1.8	-2.2 11.8 3.3 4.2 0.3 7.3 8.5 9.9 7.8 -3.6 3.3	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	-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	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	32,245 11,676 3,952 441 7,404 14,933 7,013 25,900 8,833 19,001	1.2 0.4 0.9 1.0 0.9 1.1 1.3 1.7 1.3 -2.7	-1.1 2.0 -0.4 -4.2 -5.6 -2.8 -3.5 -5.6 -6.0 -3.6	-2.2 11.8 3.3 4.2 0.3 7.3 8.5 9.9 7.8 -3.6	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	-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	32,245 11,676 3,952 441 7,404 14,933 7,013 25,900 8,833 19,001 26,946	1.2 0.4 0.9 1.0 0.9 1.1 1.3 1.7 1.3 -2.7 -1.4	-1.1 2.0 -0.4 -4.2 -5.6 -2.8 -3.5 -5.6 -6.0 -3.6 -1.8	-2.2 11.8 3.3 4.2 0.3 7.3 8.5 9.9 7.8 -3.6 3.3	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	32,245 11,676 3,952 441 7,404 14,933 7,013 25,900 8,833 19,001 26,946 309	1.2 0.4 0.9 1.0 0.9 1.1 1.3 1.7 1.3 -2.7 -1.4 -0.8	-1.1 2.0 -0.4 -4.2 -5.6 -2.8 -3.5 -5.6 -6.0 -3.6 -1.8 -2.1	-2.2 11.8 3.3 4.2 0.3 7.3 8.5 9.9 7.8 -3.6 3.3 7.7	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	-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 Bonds and Commodities	32,245 11,676 3,952 441 7,404 14,933 7,013 25,900 8,833 19,001 26,946 309	1.2 0.4 0.9 1.0 0.9 1.1 1.3 1.7 1.3 -2.7 -1.4 -0.8	-1.1 2.0 -0.4 -4.2 -5.6 -2.8 -3.5 -5.6 -6.0 -3.6 -1.8 -2.1	-2.2 11.8 3.3 4.2 0.3 7.3 8.5 9.9 7.8 -3.6 3.3 7.7	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	32,245 11,676 3,952 441 7,404 14,933 7,013 25,900 8,833 19,001 26,946 309 Latest	1.2 0.4 0.9 1.0 0.9 1.1 1.3 1.7 1.3 -2.7 -1.4 -0.8 1 Day	-1.1 2.0 -0.4 -4.2 -5.6 -2.8 -3.5 -5.6 -6.0 -3.6 -1.8 -2.1 MTD	-2.2 11.8 3.3 4.2 0.3 7.3 8.5 9.9 7.8 -3.6 3.3 7.7 YTD -14.2 -16.0	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	-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	32,245 11,676 3,952 441 7,404 14,933 7,013 25,900 8,833 19,001 26,946 309 Latest 73.8 67.6	1.2 0.4 0.9 1.0 0.9 1.1 1.3 1.7 1.3 -2.7 -1.4 -0.8 1 Day 0.9	-1.1 2.0 -0.4 -4.2 -5.6 -2.8 -3.5 -5.6 -6.0 -3.6 -1.8 -2.1 MTD -11.7 -12.2	-2.2 11.8 3.3 4.2 0.3 7.3 8.5 9.9 7.8 -3.6 3.3 7.7 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 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	2.9 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.

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.



A Prudential plc company