Daily Bulletin



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아시아 증시는 상승 마감했습니다. 중국 증시는 투자자들이 연준의 정책 결정을 기다리는 동안 미국 은행주들이 글로벌 은행 위기가 일단락될 것이라는 희망으로 반등하며 랠리를 보였습니다. 한국의 주가는 미국 당국이 더 광범위한 은행 혼란을 방지하겠다는 약속을 한 후 미 증시를 추적하며 상승했습니다. 일본 시장은 투자자들이 미 연준의 정책 결정에 주목하면서 상승했고, Nomura Holdings 및 Daiwa Securities는 각각 4.5% 상승했습니다.

유럽 증시는 은행 섹터 혼란 속에서 투자자들이 연준의 중요한 통화 정책 결정을 기다리면서 상승 마감 했습니다. 식음료주는 1% 이상, 금융 서비스 부문은 약 1.25% 하락 했습니다. 영국의 인플레이션은 2월에 10% 이상 상승했고, 이로 인해 영란은행은 목요일에 금리를 인상할 가능성이 높습니다. 그러나 룩셈부르크에 기반을 둔 부동산 기업 Aroundtown은 배당을 취소 할 수 있다는 우려로 거의 10% 하락했습니다.

미국 증시는 연준이 널리 예상되는 0.25%의 정책 금리 인상을 발표 하며 최근 금융 섹터의 혼란을 고려하여 향후 금리 인상을 중단하기 직전임을 시사 후 하락했습니다. S&P 500의 11개 주요 섹터 모두 부동산 주도로 하락 마감했습니다. First Republic 주가는 규모를 축소하거나 정부 지원을 구해야 할수도 있다는 우려로 큰 변동성 속하락했습니다. 그러나 소매 기업 GameStop Corp은 놀라운 4분기실적을 올린 후 급등했습니다.

미국채 금리는 연준 (Fed)이 시장의 예상대로 금리를 0.25% 인상한후 하락했고, 연준은 정책 입안자들이 인플레이션을 억제하기 위해올해한 번만 더 금리를 인상하면된다고 믿는다고 언급했습니다.

국제 유가는 미 연준 (Fed)이 예상 되었던 소폭의 금리 인상을 발표 하고 향후 인상을 멈출 것이라는 신호를 준 뒤 2% 이상 상승해 1주일 내 최고치를 기록했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q4 22	Q3 22	Q2 22	Feb-23	Jan-23	Dec-22
World	623	-0.7	-0.8	3.3	9.9	-6.7	-15.5	-2.8	7.2	-3.9
United States	3,739	-1.7	-0.9	3.1	7.1	-4.7	-16.8	-2.4	6.6	-5.9
Europe	1,846	0.4	-0.8	7.2	19.4	-10.1	-14.2	-0.6	8.7	0.0
Japan	3,245	1.5	1.3	3.4	13.3	-7.5	-14.6	-3.8	6.2	0.3
Emerging Markets	961	1.0	-0.1	0.9	9.8	-11.4	-11.3	-6.5	7.9	-1.4
Asia Pac Ex Japan	510	1.2	-0.1	1.2	12.2	-12.6	-10.5	-6.8	8.6	-0.4
Asia Ex Japan	627	1.2	0.6	1.4	11.4	-13.7	-8.9	-6.8	8.2	-0.1
Australia	833	1.4	-3.0	0.3	15.7	-6.7	-18.1	-6.6	10.7	-2.0
Hong Kong	10,008	2.1	-0.4	-4.0	18.2	-17.0	-1.1	-7.1	3.8	8.1
China H	64	0.8	-0.2	-0.1	13.5	-22.4	3.5	-10.4	11.8	5.2
China A	1,936	0.4	-1.5	3.1	4.3	-18.2	1.8	-4.4	9.5	2.0
Korea	446	1.7	1.5	6.1	18.5	-16.3	-20.8	-7.0	12.4	-4.9
Taiwan	572	2.2	2.3	13.9	9.7	-14.0	-19.6	-1.1	12.7	-5.4
Thailand	378	0.5	2.3	-3.6	16.1	-2.8	-10.5	-9.2	3.8	3.8
Malaysia	251	0.5	-1.1	-5.6	14.0	-7.1	-12.8	-7.2	2.9	1.8
Singapore	3,205	1.2	2.1	4.1	10.5	-1.5	-16.8	-5.1	7.5	-0.9
Indonesia	791	Hol.	-1.0	1.3	-3.5	7.8	-8.8	-1.0	3.3	-4.5
India	710	0.4	-0.3	-7.6	2.1	6.8	-13.5	-4.5	-3.0	-5.5
Philippines	425	0.1	2.4	2.4	21.2	-13.5	-19.4	-5.1	5.4	-2.1
Local Indices	Latest	1 Day	MTD	YTD	Q4 22	Q3 22	Q2 22	Feb-23	Jan-23	Dec-22
DJIA	32,030	-1.6	-1.7	-2.8	16.0	-6.2	-10.8	-3.9	2.9	-4.1
DJIA Nasdaq	32,030 11,670	-1.6 -1.6	-1.7 1.9	-2.8 11.7	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	32,030 11,670 3,937	-1.6 -1.6 -1.6	-1.7 1.9 -0.7	-2.8 11.7 3.0	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	32,030 11,670 3,937 447	-1.6 -1.6 -1.6 0.2	-1.7 1.9 -0.7 -2.7	-2.8 11.7 3.0 5.8	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	32,030 11,670 3,937 447 7,567	-1.6 -1.6 -1.6 0.2 0.4	-1.7 1.9 -0.7 -2.7 -3.5	-2.8 11.7 3.0 5.8 2.5	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	32,030 11,670 3,937 447 7,567 15,216	-1.6 -1.6 -1.6 0.2 0.4 0.1	-1.7 1.9 -0.7 -2.7 -3.5 -1.0	-2.8 11.7 3.0 5.8 2.5 9.3	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 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	32,030 11,670 3,937 447 7,567 15,216 7,131	-1.6 -1.6 -1.6 0.2 0.4 0.1	-1.7 1.9 -0.7 -2.7 -3.5 -1.0	-2.8 11.7 3.0 5.8 2.5 9.3 10.4	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	32,030 11,670 3,937 447 7,567 15,216 7,131 26,523	-1.6 -1.6 -1.6 0.2 0.4 0.1 0.4 -0.1	-1.7 1.9 -0.7 -2.7 -3.5 -1.0 -1.8 -3.3	-2.8 11.7 3.0 5.8 2.5 9.3 10.4 12.6	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	-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	32,030 11,670 3,937 447 7,567 15,216 7,131 26,523 9,009	-1.6 -1.6 -1.6 0.2 0.4 0.1 0.4 -0.1	-1.7 1.9 -0.7 -2.7 -3.5 -1.0 -1.8 -3.3 -4.1	-2.8 11.7 3.0 5.8 2.5 9.3 10.4 12.6 10.0	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 -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	32,030 11,670 3,937 447 7,567 15,216 7,131 26,523 9,009 19,591	-1.6 -1.6 -1.6 -1.6 0.2 0.4 0.1 0.4 -0.1 -0.4	-1.7 1.9 -0.7 -2.7 -3.5 -1.0 -1.8 -3.3 -4.1 -0.6	-2.8 11.7 3.0 5.8 2.5 9.3 10.4 12.6 10.0 -0.6	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	32,030 11,670 3,937 447 7,567 15,216 7,131 26,523 9,009 19,591 27,467	-1.6 -1.6 -1.6 -1.6 0.2 0.4 0.1 0.4 -0.1 -0.4 1.7	-1.7 1.9 -0.7 -2.7 -3.5 -1.0 -1.8 -3.3 -4.1 -0.6 0.1	-2.8 11.7 3.0 5.8 2.5 9.3 10.4 12.6 10.0 -0.6 5.3	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	-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 4.7	-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	32,030 11,670 3,937 447 7,567 15,216 7,131 26,523 9,009 19,591	-1.6 -1.6 -1.6 -1.6 0.2 0.4 0.1 0.4 -0.1 -0.4	-1.7 1.9 -0.7 -2.7 -3.5 -1.0 -1.8 -3.3 -4.1 -0.6	-2.8 11.7 3.0 5.8 2.5 9.3 10.4 12.6 10.0 -0.6	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	32,030 11,670 3,937 447 7,567 15,216 7,131 26,523 9,009 19,591 27,467	-1.6 -1.6 -1.6 -1.6 0.2 0.4 0.1 0.4 -0.1 -0.4 1.7	-1.7 1.9 -0.7 -2.7 -3.5 -1.0 -1.8 -3.3 -4.1 -0.6 0.1	-2.8 11.7 3.0 5.8 2.5 9.3 10.4 12.6 10.0 -0.6 5.3	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	-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 4.7	-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 Brent	32,030 11,670 3,937 447 7,567 15,216 7,131 26,523 9,009 19,591 27,467 314	-1.6 -1.6 -1.6 0.2 0.4 0.1 0.4 -0.1 -0.4 1.7 1.9	-1.7 1.9 -0.7 -2.7 -3.5 -1.0 -1.8 -3.3 -4.1 -0.6 0.1	-2.8 11.7 3.0 5.8 2.5 9.3 10.4 12.6 10.0 -0.6 5.3 9.3	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	-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	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 Brent WTI	32,030 11,670 3,937 447 7,567 15,216 7,131 26,523 9,009 19,591 27,467 314 Latest	-1.6 -1.6 -1.6 -1.6 0.2 0.4 0.1 0.4 -0.1 -0.4 1.7 1.9 1.2 1 Day 2.1 2.0	-1.7 1.9 -0.7 -2.7 -3.5 -1.0 -1.8 -3.3 -4.1 -0.6 0.1 -0.6	-2.8 11.7 3.0 5.8 2.5 9.3 10.4 12.6 10.0 -0.6 5.3 9.3	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	-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 WTI US 10Y yield	32,030 11,670 3,937 447 7,567 15,216 7,131 26,523 9,009 19,591 27,467 314 Latest 76.7	-1.6 -1.6 -1.6 -1.6 0.2 0.4 0.1 0.4 -0.1 -0.4 1.7 1.9 1.2 1 Day 2.1 2.0 -3.1	-1.7 1.9 -0.7 -2.7 -3.5 -1.0 -1.8 -3.3 -4.1 -0.6 0.1 -0.6 MTD	-2.8 11.7 3.0 5.8 2.5 9.3 10.4 12.6 10.0 -0.6 5.3 9.3 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	32,030 11,670 3,937 447 7,567 15,216 7,131 26,523 9,009 19,591 27,467 314 Latest 76.7 70.9	-1.6 -1.6 -1.6 -1.6 0.2 0.4 0.1 0.4 -0.1 -0.4 1.7 1.9 1.2 1 Day 2.1 2.0	-1.7 1.9 -0.7 -2.7 -3.5 -1.0 -1.8 -3.3 -4.1 -0.6 0.1 -0.6 MTD -8.3 -8.0	-2.8 11.7 3.0 5.8 2.5 9.3 10.4 12.6 10.0 -0.6 5.3 9.3 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 -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	2.9 10.7 6.3 6.8 4.3 8.7 9.6 12.7 10.3 10.4 4.7 9.5 Jan-23 0.2 -1.6	-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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