Daily Bulletin



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STOCKS | BONDS | INTEREST RATES | COMMODITIES | CURRENCIES

아시아 증시는 상승 마감했습니다. 중국 증시는 파산한 실리콘 밸리 은행이 구매자를 확보한 후 은행 스트레스 심화에 대한 투자자들의 우려가 완화되면서 상승했습니다. 한국의 주가는 난관에 처한 실리콘 밸리 은행(SVB)의 인수로 글로벌 은행 이슈 우려가 완화되면서 이틀 동안의 하락세 이후 상승했습니다. 일본 시장은 파산한 미국 대출 기관 Silicon Valley Bank의 자산에 대한 First Citizens BancShares의 딜 이후 글로벌 금융 시스템 우려가 완화된 후 은행주 주도로 상승 했습니다. 유럽 증시는 투자자들이 심각한 시장 변동성을 보인 후 관망 패턴을 보이면서 소폭 하락세로 마감 했습니다. 독일 Aroundtown은 수요일 실적 발표를 앞두고 약 10% 하락, 사상 최저치를 기록했습니다. 그러나 스위스 은행 UBS는 Ralph Hamers CEO가 정부 주도의 Credit Suisse 인수를 성장 기회로 본다고 언급하며 1.5% 이상 상승했고, Credit Suisse의 주가는 약 1.7% 상승했습니다.

미국 증시는 투자자들이 어려움을 겪고 있는 은행에 대한 미국 최고 규제 기관의 의견에 주목하고 최근 강세를 보인 기술 관련 기업의 주식을 매도하면서 하락 마감했습니다. S&P 500 주요 11개 섹터 중 6개가 통신서비스 주도로 하락했습니다. Alibaba Group Holding은 전자상거래, 미디어 및 클라우드를 포함하는 6개 주요 사업부로 사업을 분할할 계획이라고 발표하며 14.3% 급등했습니다. Micron Technology의 주가는 예상을 상회한 3분기 매출을 기록한 후 약 1% 상승했습니다.

미국채 금리는 은행 섹터 위기에 대한 두려움이 완화되고 투자자들 이 미국 경제와 연준의 정책 결정에 대한 가능성에 주목하며 상승 했습니다.

국제 유가는 이라크 쿠르디스탄의 공급 차질 리스크와 은행 섹터 혼란이 억제될 것이라는 희망으로 전일 급격한 상승세를 이어가며 소폭 상승했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q4 22	Q3 22	Q2 22	Feb-23	Jan-23	Dec-22
World	627	0.2	0.0	4.1	9.9	-6.7	-15.5	-2.8	7.2	-3.9
United States	3,770	-0.2	0.0	4.0	7.1	-4.7	-16.8	-2.4	6.6	-5.9
Europe	1,843	0.4	-0.8	7.2	19.4	-10.1	-14.2	-0.6	8.7	0.0
Japan	3,290	8.0	2.7	4.9	13.3	-7.5	-14.6	-3.8	6.2	0.3
Emerging Markets	971	0.7	1.0	1.9	9.8	-11.4	-11.3	-6.5	7.9	-1.4
Asia Pac Ex Japan	513	0.8	0.7	2.0	12.2	-12.6	-10.5	-6.8	8.6	-0.4
Asia Ex Japan	632	0.5	1.4	2.3	11.4	-13.7	-8.9	-6.8	8.2	-0.1
Australia	835	1.8	- 2.7	0.6	15.7	-6.7	-18.1	-6.6	10.7	-2.0
Hong Kong	10,043	0.6	-0.1	-3.6	18.2	-17.0	-1.1	-7.1	3.8	8.1
China H	65	1.2	1.4	1.6	13.5	-22.4	3.5	-10.4	11.8	5.2
China A	1,940	0.0	-1.4	3.3	4.3	-18.2	1.8	-4.4	9.5	2.0
Korea	452	1.2	3.0	7.6	18.5	-16.3	-20.8	-7.0	12.4	-4.9
Taiwan	571	-0.9	2.1	13.7	9.7	-14.0	-19.6	-1.1	12.7	-5.4
Thailand	384	1.3	3.9	-2.1	16.1	-2.8	-10.5	- 9.2	3.8	3.8
Malaysia	254	1.3	0.1	-4.5	14.0	-7.1	-12.8	-7.2	2.9	1.8
Singapore	3,270	0.7	4.2	6.2	10.5	-1.5	-16.8	- 5.1	7.5	-0.9
Indonesia	804	0.9	2.2	4.6	-3.5	7.8	-8.8	-1.0	3.3	-4.5
India	703	-0.2	-1.2	-8.5	2.1	6.8	-13.5	-4.5	-3.0	-5.5
Philippines	432	-0.3	4.3	4.3	21.2	-13.5	-19.4	-5.1	5.4	-2.1
		4 -			0400	00.00	00.00			
Local Indices	Latest	1 Day	MTD	YTD	Q4 22	Q3 22	Q2 22	Feb-23	Jan-23	Dec-22
DJIA	32,394	1 Day -0.1	-0.6	-1.7	16.0	-6.2	-10.8	-3.9	Jan-23 2.9	Dec-22 -4.1
DJIA Nasdaq	32,394 11,716	-0.1 -0.4	-0.6 2.4	-1.7 12.2	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	32,394 11,716 3,971	-0.1 -0.4 -0.2	-0.6 2.4 0.2	-1.7 12.2 3.9	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
DJIA Nasdaq	32,394 11,716	-0.1 -0.4	-0.6 2.4	-1.7 12.2	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 Euro Stoxx 600 FTSE100	32,394 11,716 3,971 444 7,484	-0.1 -0.4 -0.2 -0.1 0.2	-0.6 2.4 0.2 -3.2 -4.4	-1.7 12.2 3.9 5.3 1.5	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	32,394 11,716 3,971 444 7,484 15,142	-0.1 -0.4 -0.2 -0.1	-0.6 2.4 0.2 -3.2 -4.4 -1.5	-1.7 12.2 3.9 5.3 1.5 8.8	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	2.9 10.7 6.3 6.8	-4.1 -8.7 -5.8 -3.4 -1.5 -3.3
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40	32,394 11,716 3,971 444 7,484 15,142 7,088	-0.1 -0.4 -0.2 -0.1 0.2 0.1	-0.6 2.4 0.2 -3.2 -4.4 -1.5	-1.7 12.2 3.9 5.3 1.5 8.8 9.8	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	32,394 11,716 3,971 444 7,484 15,142 7,088 26,329	-0.1 -0.4 -0.2 -0.1 0.2 0.1 0.1	-0.6 2.4 0.2 -3.2 -4.4 -1.5 -2.4	-1.7 12.2 3.9 5.3 1.5 8.8 9.8 11.7	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 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	32,394 11,716 3,971 444 7,484 15,142 7,088 26,329 8,944	-0.1 -0.4 -0.2 -0.1 0.2 0.1 0.1 0.5 0.4	-0.6 2.4 0.2 -3.2 -4.4 -1.5 -2.4 -4.1 -4.8	-1.7 12.2 3.9 5.3 1.5 8.8 9.8 11.7 9.2	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	32,394 11,716 3,971 444 7,484 15,142 7,088 26,329 8,944 19,785	-0.1 -0.4 -0.2 -0.1 0.2 0.1 0.1 0.5 0.4	-0.6 2.4 0.2 -3.2 -4.4 -1.5 -2.4 -4.1 -4.8 0.4	-1.7 12.2 3.9 5.3 1.5 8.8 9.8 11.7 9.2 0.4	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	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	32,394 11,716 3,971 444 7,484 15,142 7,088 26,329 8,944 19,785 27,518	-0.1 -0.4 -0.2 -0.1 0.2 0.1 0.5 0.4 1.1	-0.6 2.4 0.2 -3.2 -4.4 -1.5 -2.4 -4.1 -4.8 0.4 0.3	-1.7 12.2 3.9 5.3 1.5 8.8 9.8 11.7 9.2 0.4 5.5	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	32,394 11,716 3,971 444 7,484 15,142 7,088 26,329 8,944 19,785	-0.1 -0.4 -0.2 -0.1 0.2 0.1 0.1 0.5 0.4	-0.6 2.4 0.2 -3.2 -4.4 -1.5 -2.4 -4.1 -4.8 0.4	-1.7 12.2 3.9 5.3 1.5 8.8 9.8 11.7 9.2 0.4	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	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	32,394 11,716 3,971 444 7,484 15,142 7,088 26,329 8,944 19,785 27,518	-0.1 -0.4 -0.2 -0.1 0.2 0.1 0.5 0.4 1.1	-0.6 2.4 0.2 -3.2 -4.4 -1.5 -2.4 -4.1 -4.8 0.4 0.3	-1.7 12.2 3.9 5.3 1.5 8.8 9.8 11.7 9.2 0.4 5.5	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	32,394 11,716 3,971 444 7,484 15,142 7,088 26,329 8,944 19,785 27,518 316	-0.1 -0.4 -0.2 -0.1 0.2 0.1 0.5 0.4 1.1 0.2	-0.6 2.4 0.2 -3.2 -4.4 -1.5 -2.4 -4.1 -4.8 0.4 0.3 -0.3	-1.7 12.2 3.9 5.3 1.5 8.8 9.8 11.7 9.2 0.4 5.5	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 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	32,394 11,716 3,971 444 7,484 15,142 7,088 26,329 8,944 19,785 27,518 316 Latest	-0.1 -0.4 -0.2 -0.1 0.2 0.1 0.5 0.4 1.1 0.2 1.1	-0.6 2.4 0.2 -3.2 -4.4 -1.5 -2.4 -4.1 -4.8 0.4 0.3 -0.3	-1.7 12.2 3.9 5.3 1.5 8.8 9.8 11.7 9.2 0.4 5.5 9.7	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 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	32,394 11,716 3,971 444 7,484 15,142 7,088 26,329 8,944 19,785 27,518 316 Latest 78.4	-0.1 -0.4 -0.2 -0.1 0.2 -0.1 0.1 0.5 0.4 1.1 0.2 1.1 1 Day	-0.6 2.4 0.2 -3.2 -4.4 -1.5 -2.4 -4.1 -4.8 0.4 0.3 -0.3 -0.3	-1.7 12.2 3.9 5.3 1.5 8.8 9.8 11.7 9.2 0.4 5.5 9.7 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	-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	32,394 11,716 3,971 444 7,484 15,142 7,088 26,329 8,944 19,785 27,518 316 Latest 78.4 73.6	-0.1 -0.4 -0.2 -0.1 0.2 -0.1 0.1 0.5 0.4 1.1 0.2 1.1 1 Day 0.4 1.1	-0.6 2.4 0.2 -3.2 -4.4 -1.5 -2.4 -4.1 -4.8 0.4 0.3 -0.3 MTD -6.2 -4.5	-1.7 12.2 3.9 5.3 1.5 8.8 9.8 11.7 9.2 0.4 5.5 9.7 YTD -8.8 -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 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 -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
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	32,394 11,716 3,971 444 7,484 15,142 7,088 26,329 8,944 19,785 27,518 316 Latest 78.4 73.6 3.55	-0.1 -0.4 -0.2 -0.1 0.2 -0.1 0.1 0.5 0.4 1.1 0.2 1.1 1 Day 0.4 1.1 0.6	-0.6 2.4 0.2 -3.2 -4.4 -1.5 -2.4 -4.1 -4.8 0.4 0.3 -0.3 MTD -6.2 -4.5 -9.4	-1.7 12.2 3.9 5.3 1.5 8.8 9.8 11.7 9.2 0.4 5.5 9.7 YTD -8.8 -8.6 -8.5	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 Q3 22 -20.3 -24.0 28.5	-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	-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 11.4	2.9 10.7 6.3 6.8 4.3 8.7 9.6 12.7 10.3 10.4 4.7 9.5 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 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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