Daily Bulletin



A Prudential plc company

30 March 2023

STOCKS | BONDS | INTEREST RATES | COMMODITIES | CURRENCIES

아시아 증시는 상승 마감했습니다. 중국 증시는 투자자들이 알리바바 그룹의 유례없는 변화에 긍정 반응 하며 중국의 해당 섹터에 대한 제한 이 끝나기 시작했음을 알리면서 상승했습니다. 한국의 주가는 자동차 및 배터리 제조 기업 주도로 상승했지만 반도체 기업의 하락이 상승폭을 제한했습니다. 일본 시장 은 철도 및 버스, 고무 및 제약 산업 섹터 주도로 상승 마감 했습니다. 유럽 증시는 은행 섹터 건전성에 대한 투자자들의 의구심이 계속 줄어들면서 상승 마감했습니다. 기술주는 2% 이상의 상승으로 화요일의 하락세를 반전시켰고, 금융 서비스 섹터는 1.8% 상승했습니다. 최근 Credit Suisse를 인수한 UBS의 주가는 4월 5일부터 새 그룹 CEO로 Sergio Ermotti를 발표한 후 3.5% 넘게 상승했습니다. 독일 반도체 제조기업 Infineon은 2분기 및 2023년 전체에 대한 전망을 높이며 5% 이상 상승했습니다.

미국 증시는 Micron Technology와 타 기업들의 낙관적인 전망이 경제 건전성에 대한 일부 우려를 완화함 에 따라 3개 주요 지수 모두 최소 1% 이상 오르며 랠리를 보였습니다. 11개 주요 S&P 500 섹터 중 7개가 임의 소비재 주도로 상승했습니다. Micron 주가는 2025년에 대한 장밋빛 전망을 제시한 후 7.2% 급등했으며, PHLX 반도체 지수는 인공 지능 관련주들이 매출을 끌어올리며 3.3% 상승했습니다. 미국채 금리는 투자자들이 최근의 은행 혼란이 진정되었다는 조심 스러운 낙관론을 유지하면서 상승 했습니다. 한편 벤치마크 10년 만기 국채 금리는 3.57%에 달했습니다.

국제 유가는 투자자들이 이틀 연속 수익을 실현하고 시장에 공급 부족 대한 논의가 오가면서 변동성 장세 속 하락했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q4 22	Q3 22	Q2 22	Feb-23	Jan-23	Dec-22
World	635	1.3	1.2	5.4	9.9	-6.7	-15.5	-2.8	7.2	-3.9
United States	3,825	1.5	1.4	5.5	7.1	-4.7	-16.8	-2.4	6.6	-5.9
Europe	1,866	1.3	0.5	8.5	19.4	-10.1	-14.2	-0.6	8.7	0.0
Japan	3,296	0.2	2.9	5.1	13.3	-7.5	-14.6	-3.8	6.2	0.3
Emerging Markets	980	1.0	2.0	2.9	9.8	-11.4	-11.3	-6.5	7.9	-1.4
Asia Pac Ex Japan	518	0.8	1.6	2.9	12.2	-12.6	-10.5	-6.8	8.6	-0.4
Asia Ex Japan	638	1.0	2.4	3.3	11.4	-13.7	-8.9	-6.8	8.2	-0.1
Australia	836	0.1	-2.7	0.7	15.7	-6.7	-18.1	-6.6	10.7	-2.0
Hong Kong	10,144	1.0	0.9	-2.7	18.2	-17.0	-1.1	-7.1	3.8	8.1
China H	66	1.9	3.3	3.5	13.5	-22.4	3.5	-10.4	11.8	5.2
China A	1,939	-0.1	-1.4	3.2	4.3	-18.2	1.8	-4.4	9.5	2.0
Korea	452	-0.1	2.9	7.6	18.5	-16.3	-20.8	-7.0	12.4	-4.9
Taiwan	573	0.3	2.4	14.1	9.7	-14.0	-19.6	-1.1	12.7	-5.4
Thailand	387	0.7	4.7	-1.4	16.1	-2.8	-10.5	-9.2	3.8	3.8
Malaysia	255	0.4	0.6	-4.1	14.0	-7.1	-12.8	-7.2	2.9	1.8
Singapore	3,295	0.8	5.0	7.0	10.5	-1.5	-16.8	-5.1	7.5	-0.9
Indonesia	816	2.0	4.3	6.7	-3.5	7.8	-8.8	-1.0	3.3	-4.5
India	707	0.6	-0.7	-8.0	2.1	6.8	-13.5	-4.5	-3.0	-5.5
Philippines	435	0.6	4.9	4.9	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
Local Indices DJIA	32,718	1.0	0.4	-0.8	16.0	-6.2	-10.8	-3.9	2.9	-4.1
DJIA Nasdaq	32,718 11,926	1.0 1.8	0.4 4.2	-0.8 14.2	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	32,718 11,926 4,028	1.0 1.8 1.4	0.4 4.2 1.6	-0.8 14.2 5.3	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	32,718 11,926 4,028 450	1.0 1.8 1.4 1.3	0.4 4.2 1.6 -1.9	-0.8 14.2 5.3 6.7	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	32,718 11,926 4,028 450 7,564	1.0 1.8 1.4 1.3	0.4 4.2 1.6 -1.9	-0.8 14.2 5.3 6.7 2.6	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	32,718 11,926 4,028 450 7,564 15,329	1.0 1.8 1.4 1.3 1.1	0.4 4.2 1.6 -1.9 -3.4 -0.2	-0.8 14.2 5.3 6.7 2.6 10.1	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	32,718 11,926 4,028 450 7,564 15,329 7,187	1.0 1.8 1.4 1.3 1.1 1.2	0.4 4.2 1.6 -1.9 -3.4 -0.2 -1.0	-0.8 14.2 5.3 6.7 2.6 10.1 11.3	16.0 -0.8 7.6 9.9 8.7 14.9	-6.2 -3.9 -4.9 -4.3 -2.7 -5.2 -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	32,718 11,926 4,028 450 7,564 15,329 7,187 26,739	1.0 1.8 1.4 1.3 1.1 1.2 1.4	0.4 4.2 1.6 -1.9 -3.4 -0.2 -1.0	-0.8 14.2 5.3 6.7 2.6 10.1 11.3 13.5	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 -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	32,718 11,926 4,028 450 7,564 15,329 7,187 26,739 9,071	1.0 1.8 1.4 1.3 1.1 1.2 1.4 1.6	0.4 4.2 1.6 -1.9 -3.4 -0.2 -1.0 -2.6 -3.4	-0.8 14.2 5.3 6.7 2.6 10.1 11.3 13.5	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	32,718 11,926 4,028 450 7,564 15,329 7,187 26,739 9,071 20,192	1.0 1.8 1.4 1.3 1.1 1.2 1.4 1.6 1.4	0.4 4.2 1.6 -1.9 -3.4 -0.2 -1.0 -2.6 -3.4 2.4	-0.8 14.2 5.3 6.7 2.6 10.1 11.3 13.5 10.8 2.5	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	32,718 11,926 4,028 450 7,564 15,329 7,187 26,739 9,071 20,192 27,884	1.0 1.8 1.4 1.3 1.1 1.2 1.4 1.6 1.4 2.1	0.4 4.2 1.6 -1.9 -3.4 -0.2 -1.0 -2.6 -3.4 2.4 1.6	-0.8 14.2 5.3 6.7 2.6 10.1 11.3 13.5 10.8 2.5 6.9	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	32,718 11,926 4,028 450 7,564 15,329 7,187 26,739 9,071 20,192	1.0 1.8 1.4 1.3 1.1 1.2 1.4 1.6 1.4	0.4 4.2 1.6 -1.9 -3.4 -0.2 -1.0 -2.6 -3.4 2.4	-0.8 14.2 5.3 6.7 2.6 10.1 11.3 13.5 10.8 2.5	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	32,718 11,926 4,028 450 7,564 15,329 7,187 26,739 9,071 20,192 27,884 317 Latest	1.0 1.8 1.4 1.3 1.1 1.2 1.4 1.6 1.4 2.1 1.3 0.3	0.4 4.2 1.6 -1.9 -3.4 -0.2 -1.0 -2.6 -3.4 2.4 1.6 0.1	-0.8 14.2 5.3 6.7 2.6 10.1 11.3 13.5 10.8 2.5 6.9 10.1 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	-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	-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	-4.1 -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	32,718 11,926 4,028 450 7,564 15,329 7,187 26,739 9,071 20,192 27,884 317	1.0 1.8 1.4 1.3 1.1 1.2 1.4 1.6 1.4 2.1 1.3 0.3	0.4 4.2 1.6 -1.9 -3.4 -0.2 -1.0 -2.6 -3.4 2.4 1.6 0.1	-0.8 14.2 5.3 6.7 2.6 10.1 11.3 13.5 10.8 2.5 6.9 10.1	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	-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	32,718 11,926 4,028 450 7,564 15,329 7,187 26,739 9,071 20,192 27,884 317 Latest	1.0 1.8 1.4 1.3 1.1 1.2 1.4 1.6 1.4 2.1 1.3 0.3	0.4 4.2 1.6 -1.9 -3.4 -0.2 -1.0 -2.6 -3.4 2.4 1.6 0.1	-0.8 14.2 5.3 6.7 2.6 10.1 11.3 13.5 10.8 2.5 6.9 10.1 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	-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	32,718 11,926 4,028 450 7,564 15,329 7,187 26,739 9,071 20,192 27,884 317 Latest 77.5	1.0 1.8 1.4 1.3 1.1 1.2 1.4 1.6 1.4 2.1 1.3 0.3	0.4 4.2 1.6 -1.9 -3.4 -0.2 -1.0 -2.6 -3.4 2.4 1.6 0.1 MTD -7.3	-0.8 14.2 5.3 6.7 2.6 10.1 11.3 13.5 10.8 2.5 6.9 10.1 YTD -9.9	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8 5.3	-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	32,718 11,926 4,028 450 7,564 15,329 7,187 26,739 9,071 20,192 27,884 317 Latest 77.5 72.8	1.0 1.8 1.4 1.3 1.1 1.2 1.4 1.6 1.4 2.1 1.3 0.3 1 Day	0.4 4.2 1.6 -1.9 -3.4 -0.2 -1.0 -2.6 -3.4 2.4 1.6 0.1 MTD -7.3 -5.5	-0.8 14.2 5.3 6.7 2.6 10.1 11.3 13.5 10.8 2.5 6.9 10.1 YTD -9.9 -9.6	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 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