Daily Bulletin



A Prudential plc company

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아시아 증시는 대체로 하락 마감 했습니다. 중국 증시는 미중 무역 및 기술 분쟁이 확대되면서 미국 부채한도 협상과 관련 이미 약세를 보인 투자심리가 더해져 하락 했습니다. 한국의 주가는 예상대로 발표된 한국은행의 금리 결정에 반응이 제한적인 가운데 미국 부채한도 협상의 부진한 진전에 대한 경계감으로 하락했습니다. 일본 시장은 실적 낙관론과 외국인들의 견조한 자금 유입으로 반도체 관련주가 주도하며 상승했습니다.

유럽 증시는 미국 부채 한도 교착 상태와 글로벌 경기 둔화에 대한 우려가 재부각되면서 낙관적인 기업 실적에 대한 초기 낙관론보다 더 큰 영향을 미치며 하락 마감한 반면, 명품주는 큰 매도세 이후 안정세를 보였습니다. 영국 영화관 체인 운영사 Cineworld 주가는 7월 에 챕터 11 파산 보호에서 벗어날 것으로 예상한다고 밝혔음에도 8% 넘게 하락했습니다. 그러나 GN Store Nord는 성공적인 사모 채권 발행을 하며 11% 상승했습니다. 미국 증시는 투자자들이 미국 부채한도 협상의 진전 조짐을 주시하는 가운데 Nvidia의 호실적 전망에힘입어 큰 폭으로 상승했습니다. S&P 500 주요 11개 섹터 중 5개가 IT 주도로 상승세로 마감했습니다. 세계에서 가장 가치가 높은 반도체제조기업 Nvidia의 주가는 분기매출이 예상치보다 50% 높을 것으로 전망하고 인공지능(AI) 반도체수요를 충족하기 위해 공급을들리고 있다고 밝힌 후 24% 급등했습니다.

미 국채 금리는 경제지표가 예상을 웃돌면서 상승했습니다. 반면 10년 물 금리는 2bps 상승하며 3.8%에 달했습니다.

국제 유가는 알렉산더 노박 러시아 부총리가 다음 주 회의에서 OPEC+ 의 추가 감산 가능성을 낮추며 하락했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q4 22	Q3 22	Q2 22	Apr-23	Mar-23	Feb-23
World	646	0.2	-1.1	7.8	7.4	9.9	-6.7	1.5	3.2	-2.8
United States	3,938	0.8	-0.2	8.9	7.7	7.1	-4.7	1.3	3.6	-2.4
Europe	1,873	-0.6	-4.2	10.6	10.7	19.4	-10.1	4.3	2.5	-0.6
Japan	3,383	-0.9	2.2	9.1	6.4	13.3	-7.5	0.4	4.1	-3.8
Emerging Markets	964	-0.7	-1.1	1.7	4.0	9.8	-11.4	-1.1	3.1	-6.5
Asia Pac Ex Japan	504	-0.9	-1.9	0.5	4.1	12.2	-12.6	-1.7	2.8	-6.8
Asia Ex Japan	619	-0.8	-1.5	0.7	4.4	11.4	-13.7	-2.1	3.5	-6.8
Australia	820	-1.6	-3.6	-0.6	2.8	15.7	-6.7	0.2	-0.6	-6.6
Hong Kong	9,443	-1.2	-6.7	-8.4	-2.4	18.2	-17.0	0.6	1.2	-7.1
China H	59	-2.1	-6.2	-6.8	4.7	13.5	-22.4	-5.2	4.5	-10.4
China A	1,802	-0.5	-6.3	-3.9	4.7	4.3	-18.2	-2.1	0.0	-4.4
Korea	471	-1.0	3.5	12.5	9.7	18.5	-16.3	-0.9	4.9	-7.0
Taiwan	578	1.3	4.8	15.3	14.8	9.7	-14.0	-4.2	3.1	-1.1
Thailand	364	-0.5	-1.7	-6.5	-1.6	16.1	-2.8	-3.3	4.4	-9.2
Malaysia	241	-1.3	-4.5	-9.1	-3.6	14.0	-7.1	-1.3	1.0	-7.2
Singapore	3,055	-0.9	-4.7	1.3	7.1	10.5	-1.5	-0.7	5.0	-5.1
Indonesia	837	-0.9	-2.4	10.9	6.5	-3.5	7.8	6.7	4.0	-1.0
India	761	0.2	1.6	-0.8	-6.3	2.1	6.8	4.2	1.2	-4.5
Philippines	419	-1.3	-2.4	1.4	2.7	21.2	-13.5	1.2	2.7	-5.1
Local Indices	Latest	1 Day	MTD	YTD	Q4 22	Q3 22	Q2 22	Apr-23	Mar-23	Feb-23
Local Indices DJA	Latest 32,765	-0.1	MTD -3.7	YTD -0.3	Q4 22 0.9	Q3 22 16.0	Q2 22 -6.2	Apr-23 2.6	Mar-23 2.1	Feb-23 -3.9
DJA Nasdaq		-0.1 1.7	-3.7 4.0			16.0 -0.8				
DJA Nasdaq S&P 500	32,765	-0.1 1.7 0.9	-3.7 4.0 -0.3	-0.3 21.8 8.9	0.9 17.0 7.5	16.0 -0.8 7.6	-6.2 -3.9 -4.9	2.6 0.1 1.6	2.1 6.8 3.7	-3.9 -1.0 -2.4
DJA Nasdaq S&P 500 Euro Stoxx 600	32,765 12,698	-0.1 1.7	-3.7 4.0 -0.3 -1.5	-0.3 21.8 8.9 9.7	0.9 17.0 7.5 8.6	16.0 -0.8 7.6 9.9	-6.2 -3.9 -4.9 -4.3	2.6 0.1	2.1 6.8 3.7 -0.2	-3.9 -1.0
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100	32,765 12,698 4,151 456 7,571	-0.1 1.7 0.9 -0.3 -0.7	-3.7 4.0 -0.3 -1.5 -3.3	-0.3 21.8 8.9 9.7 3.5	0.9 17.0 7.5 8.6 3.6	16.0 -0.8 7.6 9.9 8.7	-6.2 -3.9 -4.9 -4.3 -2.7	2.6 0.1 1.6 2.6 3.4	2.1 6.8 3.7 -0.2 -2.5	-3.9 -1.0 -2.4 1.9 1.8
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX	32,765 12,698 4,151 456 7,571 15,794	-0.1 1.7 0.9 -0.3 -0.7	-3.7 4.0 -0.3 -1.5 -3.3 -0.8	-0.3 21.8 8.9 9.7 3.5 13.4	0.9 17.0 7.5 8.6 3.6 12.2	16.0 -0.8 7.6 9.9 8.7 14.9	-6.2 -3.9 -4.9 -4.3 -2.7 -5.2	2.6 0.1 1.6 2.6 3.4 1.9	2.1 6.8 3.7 -0.2 -2.5 1.7	-3.9 -1.0 -2.4 1.9 1.8 1.6
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40	32,765 12,698 4,151 456 7,571 15,794 7,229	-0.1 1.7 0.9 -0.3 -0.7 -0.3	-3.7 4.0 -0.3 -1.5 -3.3 -0.8 -2.6	-0.3 21.8 8.9 9.7 3.5 13.4 13.8	0.9 17.0 7.5 8.6 3.6 12.2 13.4	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	2.6 0.1 1.6 2.6 3.4 1.9 3.0	2.1 6.8 3.7 -0.2 -2.5 1.7 0.9	-3.9 -1.0 -2.4 1.9 1.8 1.6 2.6
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB	32,765 12,698 4,151 456 7,571 15,794 7,229 26,408	-0.1 1.7 0.9 -0.3 -0.7 -0.3 -0.3	-3.7 4.0 -0.3 -1.5 -3.3 -0.8 -2.6 -1.2	-0.3 21.8 8.9 9.7 3.5 13.4 13.8 15.1	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1	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	2.6 0.1 1.6 2.6 3.4 1.9 3.0	2.1 6.8 3.7 -0.2 -2.5 1.7 0.9 -1.2	-3.9 -1.0 -2.4 1.9 1.8 1.6 2.6 3.3
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35	32,765 12,698 4,151 456 7,571 15,794 7,229 26,408 9,116	-0.1 1.7 0.9 -0.3 -0.7 -0.3 -0.3 -0.4 -0.5	-3.7 4.0 -0.3 -1.5 -3.3 -0.8 -2.6 -1.2 -1.2	-0.3 21.8 8.9 9.7 3.5 13.4 13.8 15.1 12.9	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8	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	2.6 0.1 1.6 2.6 3.4 1.9 3.0 1.2	2.1 6.8 3.7 -0.2 -2.5 1.7 0.9 -1.2 -1.7	-3.9 -1.0 -2.4 1.9 1.8 1.6 2.6 3.3 4.0
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	32,765 12,698 4,151 456 7,571 15,794 7,229 26,408	-0.1 1.7 0.9 -0.3 -0.7 -0.3 -0.3 -0.4 -0.5 -1.9	-3.7 4.0 -0.3 -1.5 -3.3 -0.8 -2.6 -1.2 -1.2 -5.3	-0.3 21.8 8.9 9.7 3.5 13.4 13.8 15.1 12.9	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5	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	2.6 0.1 1.6 2.6 3.4 1.9 3.0 1.2 1.3	2.1 6.8 3.7 -0.2 -2.5 1.7 0.9 -1.2 -1.7 3.5	-3.9 -1.0 -2.4 1.9 1.8 1.6 2.6 3.3 4.0
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	32,765 12,698 4,151 456 7,571 15,794 7,229 26,408 9,116 18,747 30,801	-0.1 1.7 0.9 -0.3 -0.7 -0.3 -0.3 -0.4 -0.5 -1.9	-3.7 4.0 -0.3 -1.5 -3.3 -0.8 -2.6 -1.2 -1.2 -5.3 6.7	-0.3 21.8 8.9 9.7 3.5 13.4 13.8 15.1 12.9 -4.4 19.2	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5 8.5	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	2.6 0.1 1.6 2.6 3.4 1.9 3.0 1.2 1.3 -2.4 2.9	2.1 6.8 3.7 -0.2 -2.5 1.7 0.9 -1.2 -1.7 3.5 3.1	-3.9 -1.0 -2.4 1.9 1.8 1.6 2.6 3.3 4.0 -9.4 0.5
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	32,765 12,698 4,151 456 7,571 15,794 7,229 26,408 9,116 18,747	-0.1 1.7 0.9 -0.3 -0.7 -0.3 -0.3 -0.4 -0.5 -1.9	-3.7 4.0 -0.3 -1.5 -3.3 -0.8 -2.6 -1.2 -1.2 -5.3	-0.3 21.8 8.9 9.7 3.5 13.4 13.8 15.1 12.9	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5	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	2.6 0.1 1.6 2.6 3.4 1.9 3.0 1.2 1.3	2.1 6.8 3.7 -0.2 -2.5 1.7 0.9 -1.2 -1.7 3.5	-3.9 -1.0 -2.4 1.9 1.8 1.6 2.6 3.3 4.0
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	32,765 12,698 4,151 456 7,571 15,794 7,229 26,408 9,116 18,747 30,801	-0.1 1.7 0.9 -0.3 -0.7 -0.3 -0.3 -0.4 -0.5 -1.9	-3.7 4.0 -0.3 -1.5 -3.3 -0.8 -2.6 -1.2 -1.2 -5.3 6.7	-0.3 21.8 8.9 9.7 3.5 13.4 13.8 15.1 12.9 -4.4 19.2	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5 8.5	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	2.6 0.1 1.6 2.6 3.4 1.9 3.0 1.2 1.3 -2.4 2.9	2.1 6.8 3.7 -0.2 -2.5 1.7 0.9 -1.2 -1.7 3.5 3.1	-3.9 -1.0 -2.4 1.9 1.8 1.6 2.6 3.3 4.0 -9.4 0.5
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI	32,765 12,698 4,151 456 7,571 15,794 7,229 26,408 9,116 18,747 30,801 335	-0.1 1.7 0.9 -0.3 -0.7 -0.3 -0.3 -0.4 -0.5 -1.9 0.4 -0.3	-3.7 4.0 -0.3 -1.5 -3.3 -0.8 -2.6 -1.2 -1.2 -5.3 6.7 2.4	-0.3 21.8 8.9 9.7 3.5 13.4 13.8 15.1 12.9 -4.4 19.2 17.5	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5 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	-6.2 -3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -2.4 -8.3 -20.1 -0.8 -8.1	2.6 0.1 1.6 2.6 3.4 1.9 3.0 1.2 1.3 -2.4 2.9	2.1 6.8 3.7 -0.2 -2.5 1.7 0.9 -1.2 -1.7 3.5 3.1	-3.9 -1.0 -2.4 1.9 1.8 1.6 2.6 3.3 4.0 -9.4 0.5 0.4
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities	32,765 12,698 4,151 456 7,571 15,794 7,229 26,408 9,116 18,747 30,801 335 Latest	-0.1 1.7 0.9 -0.3 -0.7 -0.3 -0.3 -0.4 -0.5 -1.9 0.4 -0.3	-3.7 4.0 -0.3 -1.5 -3.3 -0.8 -2.6 -1.2 -1.2 -5.3 6.7 2.4	-0.3 21.8 8.9 9.7 3.5 13.4 13.8 15.1 12.9 -4.4 19.2 17.5	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5 8.5 11.5	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8 5.3 Q3 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	2.6 0.1 1.6 2.6 3.4 1.9 3.0 1.2 1.3 -2.4 2.9 2.9	2.1 6.8 3.7 -0.2 -2.5 1.7 0.9 -1.2 -1.7 3.5 3.1 1.4	-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
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent	32,765 12,698 4,151 456 7,571 15,794 7,229 26,408 9,116 18,747 30,801 335 Latest	-0.1 1.7 0.9 -0.3 -0.7 -0.3 -0.3 -0.4 -0.5 -1.9 0.4 -0.3 1 Day	-3.7 4.0 -0.3 -1.5 -3.3 -0.8 -2.6 -1.2 -1.2 -5.3 6.7 2.4 MTD -4.1 -6.4	-0.3 21.8 8.9 9.7 3.5 13.4 13.8 15.1 12.9 -4.4 19.2 17.5 YTD -11.3 -10.8	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5 8.5 11.5 Q4 22 -7.6 -7.1	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8 5.3 Q3 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 Q2 22 -20.3	2.6 0.1 1.6 2.6 3.4 1.9 3.0 1.2 1.3 -2.4 2.9 2.9 Apr-23	2.1 6.8 3.7 -0.2 -2.5 1.7 0.9 -1.2 -1.7 3.5 3.1 1.4 Mar-23	-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
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent WTI	32,765 12,698 4,151 456 7,571 15,794 7,229 26,408 9,116 18,747 30,801 335 Latest 76.3 71.8	-0.1 1.7 0.9 -0.3 -0.7 -0.3 -0.3 -0.4 -0.5 -1.9 0.4 -0.3 1 Day -1.9 -2.8	-3.7 4.0 -0.3 -1.5 -3.3 -0.8 -2.6 -1.2 -1.2 -5.3 6.7 2.4 MTD	-0.3 21.8 8.9 9.7 3.5 13.4 13.8 15.1 12.9 -4.4 19.2 17.5 YTD	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5 8.5 11.5 Q4 22	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8 5.3 Q3 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 Q2 22 -20.3 -24.0	2.6 0.1 1.6 2.6 3.4 1.9 3.0 1.2 1.3 -2.4 2.9 2.9 Apr-23	2.1 6.8 3.7 -0.2 -2.5 1.7 0.9 -1.2 -1.7 3.5 3.1 1.4 Mar-23	-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

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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