Daily Bulletin



A Prudential plc company

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STOCKS | BONDS | INTEREST RATES | COMMODITIES | CURRENCIES

아시아 증시는 상승 마감했습니다. 중국 증시는 5월 제조업 지표 발표를 앞두고 투자자들이 관망세를 유지하면서 상승했고 Alibaba 주가는 1% 넘게 올랐습니다. 한국 의 주가는 투자자들이 미국 부채 한도 합의 관련 낙관론을 주가에 반영하며 상승했고 반도체 제조 기업들은 인공지능에 대한 기대감 으로 상승폭을 확대했습니다. 일본 시장은 투자자들이 미국 소비자 신뢰지수와 부채한도 협상 타결에 주목하면서 상승했고Advantest Corp. 주가는 2% 올랐습니다. 유럽 증시는 미 의회가 부채한도 협상을 타결하고 디폴트를 피할 수 있을지에 대한 불확실성으로 하락 마감했습니다. 식음료주는 3% 가까이 하락한 반면 유틸리티주는 1% 넘게 상승했습니다. 스위스 식품 그룹 Nestle 주가는 런던증권 거래소 그룹의 재무 책임자 Anna Manz 를 새로운 CFO로 영입했다고 밝힌 후 1% 가량 하락했습니다. 한편, 독일 부동산 기업 Aroundtown은 1분기 실적을 발표한 후 2% 하락했습니다. 미국 증시는 3조 1,400억 달러의 부채 한도 증액에 반대하는 의원들에 대한 우려로 혼조세로 마감했지만, Nvidia 주가가 급등하면서해당 반도체 제조기업을 1조 달러가치 기업 클럽에 잠시 진입시킨 데힘입어 상승했습니다. S&P 500주요 11개 섹터 중 7개는 필수소비재 주도로 하락 마감했습니다. Nvidia Corp.는 챗봇 센세이션을일으킨 ChatGPT 등 애플리케이션을 구동하는 AI 반도체에 대한수요가 급증할 것으로 예상되면서 3% 이상 상승했습니다.

미 국채 금리는 부채 한도 증액과 디폴트 가능성을 피하기 위한 합의로 투자자를 안심시키면서 하락했습니다. 한편 벤치마크 10년 만기 국채 금리는 3.69%까지 떨어졌습니다.

국제 유가는 미국 의회의 부채한도 증액안 통과 여부에 대한 우려와 이번 주말 OPEC+ 회의를 앞두고 주요 산유국들의 엇갈린 메시지로 공급 전망이 흐려지면서 4.5% 이상 급락했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q4 22	Q3 22	Q2 22	Apr-23	Mar-23	Feb-23
World	652	-0.1	-0.1	8.9	7.4	9.9	-6.7	1.5	3.2	-2.8
United States	3,992	0.0	1.2	10.4	7.7	7.1	-4.7	1.3	3.6	-2.4
Europe	1,875	-0.7	-4.1	10.8	10.7	19.4	-10.1	4.3	2.5	-0.6
Japan	3,414	0.4	3.2	10.1	6.4	13.3	-7.5	0.4	4.1	-3.8
Emerging Markets	970	-0.1	-0.5	2.4	4.0	9.8	-11.4	-1.1	3.1	-6.5
Asia Pac Ex Japan	508	0.0	-1.0	1.4	4.1	12.2	-12.6	-1.7	2.8	-6.8
Asia Ex Japan	625	0.1	-0.7	1.6	4.4	11.4	-13.7	-2.1	3.5	-6.8
Australia	831	-0.5	-2.3	0.6	2.8	15.7	-6.7	0.2	-0.6	-6.6
Hong Kong	9,383	-0.2	-7.2	-8.9	-2.4	18.2	-17.0	0.6	1.2	-7.1
China H	59	0.0	-6.7	-7.4	4.7	13.5	-22.4	-5.2	4.5	-10.4
China A	1,794	-0.1	-6.6	-4.3	4.7	4.3	-18.2	-2.1	0.0	-4.4
Korea	481	1.3	5.8	14.9	9.7	18.5	-16.3	-0.9	4.9	-7.0
Taiwan	597	-0.1	8.3	19.1	14.8	9.7	-14.0	-4.2	3.1	-1.1
Thailand	361	-0.6	-2.5	-7.3	-1.6	16.1	-2.8	-3.3	4.4	-9.2
Malaysia	241	-0.6	-4.4	-9.0	-3.6	14.0	-7.1	-1.3	1.0	-7.2
Singapore	3,032	-0.4	-5.4	0.6	7.1	10.5	-1.5	-0.7	5.0	-5.1
Indonesia	838	-0.6	-2.1	11.2	6.5	-3.5	7.8	6.7	4.0	-1.0
India	773	0.0	3.2	8.0	-6.3	2.1	6.8	4.2	1.2	-4.5
Philippines	413	-1.8	-3.6	0.2	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 33,043	1 Day -0.1	MTD -2.9	YTD 0.6	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	33,043 13,017	-0.1 0.3	- 2.9 6.6	0.6 24.8	0.9 17.0	16.0 -0.8	-6.2 -3.9	2.6 0.1	2.1 6.8	-3.9 -1.0
DJA Nasdaq S&P 500	33,043 13,017 4,206	-0.1 0.3 0.0	-2.9 6.6 1.0	0.6 24.8 10.3	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	33,043 13,017 4,206 457	-0.1 0.3 0.0 -0.8	-2.9 6.6 1.0 -1.3	0.6 24.8 10.3 9.9	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 1.6 2.6	2.1 6.8 3.7 -0.2	-3.9 -1.0
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100	33,043 13,017 4,206 457 7,522	-0.1 0.3 0.0 -0.8 -1.4	-2.9 6.6 1.0 -1.3 -4.0	0.6 24.8 10.3 9.9 2.9	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	33,043 13,017 4,206 457 7,522 15,909	-0.1 0.3 0.0 -0.8 -1.4 -0.3	-2.9 6.6 1.0 -1.3 -4.0 -0.1	0.6 24.8 10.3 9.9 2.9 14.3	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	33,043 13,017 4,206 457 7,522 15,909 7,210	-0.1 0.3 0.0 -0.8 -1.4 -0.3 -0.8	-2.9 6.6 1.0 -1.3 -4.0 -0.1 -2.4	0.6 24.8 10.3 9.9 2.9 14.3 14.1	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	33,043 13,017 4,206 457 7,522 15,909 7,210 26,576	-0.1 0.3 0.0 -0.8 -1.4 -0.3 -0.8	-2.9 6.6 1.0 -1.3 -4.0 -0.1 -2.4 -0.6	0.6 24.8 10.3 9.9 2.9 14.3 14.1 15.8	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	-6.2 -3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -2.4	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	33,043 13,017 4,206 457 7,522 15,909 7,210 26,576 9,168	-0.1 0.3 0.0 -0.8 -1.4 -0.3 -0.8 -0.2	-2.9 6.6 1.0 -1.3 -4.0 -0.1 -2.4 -0.6 -0.6	0.6 24.8 10.3 9.9 2.9 14.3 14.1 15.8 13.5	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	33,043 13,017 4,206 457 7,522 15,909 7,210 26,576 9,168 18,596	-0.1 0.3 0.0 -0.8 -1.4 -0.3 -0.8 -0.2 -0.1 0.2	-2.9 6.6 1.0 -1.3 -4.0 -0.1 -2.4 -0.6 -0.6 -6.0	0.6 24.8 10.3 9.9 2.9 14.3 14.1 15.8 13.5	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 -9.4
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	33,043 13,017 4,206 457 7,522 15,909 7,210 26,576 9,168 18,596 31,328	-0.1 0.3 0.0 -0.8 -1.4 -0.3 -0.8 -0.2 -0.1 0.2 0.3	-2.9 6.6 1.0 -1.3 -4.0 -0.1 -2.4 -0.6 -0.6 -6.0 8.6	0.6 24.8 10.3 9.9 2.9 14.3 14.1 15.8 13.5 -5.1 21.3	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 -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	33,043 13,017 4,206 457 7,522 15,909 7,210 26,576 9,168 18,596	-0.1 0.3 0.0 -0.8 -1.4 -0.3 -0.8 -0.2 -0.1 0.2	-2.9 6.6 1.0 -1.3 -4.0 -0.1 -2.4 -0.6 -0.6 -6.0	0.6 24.8 10.3 9.9 2.9 14.3 14.1 15.8 13.5	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 -9.4
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	33,043 13,017 4,206 457 7,522 15,909 7,210 26,576 9,168 18,596 31,328	-0.1 0.3 0.0 -0.8 -1.4 -0.3 -0.8 -0.2 -0.1 0.2 0.3	-2.9 6.6 1.0 -1.3 -4.0 -0.1 -2.4 -0.6 -0.6 -6.0 8.6	0.6 24.8 10.3 9.9 2.9 14.3 14.1 15.8 13.5 -5.1 21.3	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 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	33,043 13,017 4,206 457 7,522 15,909 7,210 26,576 9,168 18,596 31,328 342	-0.1 0.3 0.0 -0.8 -1.4 -0.3 -0.8 -0.2 -0.1 0.2 0.3 1.0	-2.9 6.6 1.0 -1.3 -4.0 -0.1 -2.4 -0.6 -0.6 -6.0 8.6 4.0	0.6 24.8 10.3 9.9 2.9 14.3 14.1 15.8 13.5 -5.1 21.3 19.4	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
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities	33,043 13,017 4,206 457 7,522 15,909 7,210 26,576 9,168 18,596 31,328 342 Latest	-0.1 0.3 0.0 -0.8 -1.4 -0.3 -0.8 -0.2 -0.1 0.2 0.3 1.0	-2.9 6.6 1.0 -1.3 -4.0 -0.1 -2.4 -0.6 -0.6 -6.0 8.6 4.0	0.6 24.8 10.3 9.9 2.9 14.3 14.1 15.8 13.5 -5.1 21.3 19.4 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	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 2.9	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
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent	33,043 13,017 4,206 457 7,522 15,909 7,210 26,576 9,168 18,596 31,328 342 Latest	-0.1 0.3 0.0 -0.8 -1.4 -0.3 -0.8 -0.2 -0.1 0.2 0.3 1.0 1 Day -4.6 -4.7	-2.9 6.6 1.0 -1.3 -4.0 -0.1 -2.4 -0.6 -0.6 -6.0 8.6 4.0 MTD -7.5 -9.5	0.6 24.8 10.3 9.9 2.9 14.3 14.1 15.8 13.5 -5.1 21.3 19.4 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 -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	33,043 13,017 4,206 457 7,522 15,909 7,210 26,576 9,168 18,596 31,328 342 Latest 73.5 69.5	-0.1 0.3 0.0 -0.8 -1.4 -0.3 -0.8 -0.2 -0.1 0.2 0.3 1.0 1 Day -4.6 -4.7 -2.9	-2.9 6.6 1.0 -1.3 -4.0 -0.1 -2.4 -0.6 -0.6 -6.0 8.6 4.0 MTD -7.5 -9.5 7.3	0.6 24.8 10.3 9.9 2.9 14.3 14.1 15.8 13.5 -5.1 21.3 19.4 YTD -14.5 -13.7 -4.9	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 -10.3	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8 5.3 Q3 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 Q2 22 -20.3 -24.0 28.5	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 0.1 2.6 -1.1	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 -2.9 -2.8 11.4
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 US 10Y yield	33,043 13,017 4,206 457 7,522 15,909 7,210 26,576 9,168 18,596 31,328 342 Latest 73.5 69.5 3.69	-0.1 0.3 0.0 -0.8 -1.4 -0.3 -0.8 -0.2 -0.1 0.2 0.3 1.0 1 Day -4.6 -4.7	-2.9 6.6 1.0 -1.3 -4.0 -0.1 -2.4 -0.6 -0.6 -6.0 8.6 4.0 MTD -7.5 -9.5	0.6 24.8 10.3 9.9 2.9 14.3 14.1 15.8 13.5 -5.1 21.3 19.4 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 -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 -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 -2.9 -2.8

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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