Daily Bulletin



A Prudential plc company

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STOCKS | BONDS | INTEREST RATES | COMMODITIES | CURRENCIES

아시아 증시는 금요일 상승 마감 했습니다. 중국 증시는 미국 상원이 역사적인 채무 불이행을 피할 수 있는 법안을 통과시키고 연준이 금리 인상을 중단할 수 있다는 높은 기대감으로 아시아 랠리에 동참 하며 상승했습니다. 한국의 주가는 미국 상원이 정부 부채 한도를 유예하는 법안을 승인하면서 위험선호심리가 강화되면서 반등했습니다. 일본 시장은 중앙은행들이 통화정책 긴축을 서두르지 않을 것이라는 신호에 상승했고 SoftBank Group 주가는 4% 넘게 올랐습니다.

유럽 증시는 유로존 인플레이션 완화, 미국 부채 법안 통과, 연준이 이번 달 금리 인상을 중단할 것 이라는 증거의 확대가 투자자들을 안심시키며 금요일 상승 마감 했습니다. 원유와 가스, 자동차 주 는 각각 2.5% 이상 올랐고, Adidas 주가는 6% 가까이 상승했습니다. SBB의 주가는 회사의 설립자이자 CEO 였던 Ilija Batljan이 물러나고 Leiv Synnes로 교체되며 이사회가 자산 매각이나 그룹 인수자를 찾는 과정에서 약 53% 상승했습니다.

미국 증시는 5월 임금 상승률이 완만해졌다는 노동시장 보고서가 연준이 2주 후 금리 인상을 하지 않을 수 있음을 시사하며 투자자들이 워싱턴의 채무 불이행 사태를 피한 합의에 환호하면서 금요일 상승했습니다. 11개 주요 S&P 500 섹터 모두 소재 주도로 상승 마감했습니다. 그러나 Nvidia Corp. 주가는 시가 향후 상당한 수익을 가져올 것이라는 기대감 으로 1조달러 대형주 엘리트 클럽에 잠시 진입한 후 1% 넘게 하락했습니다.

미국채 금리는 5월 고용이 예상 보다 증가했다는 노동부 데이터에 따라 금요일 상승했으며, 이는 이달 말 연준이 금리를 인상하도록 압력을 가할 수 있습니다.

국제 유가는 미국 의회가 세계 최대 석유 소비국의 정부 디폴트를 막는 부채 한도 협상을 통과시키고 고용 지표가 연준의 금리 인상 중단 가능성에 대한 기대감을 가져오며 금요일 상승했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q4 22	Q3 22	Q2 22	May-23	Apr-23	Mar-23
World	663	1.6	2.6	10.8	7.4	9.9	-6.7	-1.0	1.5	3.2
United States	4,069	1.5	2.5	12.6	7.7	7.1	-4.7	0.7	1.3	3.6
Europe	1,895	1.4	2.9	12.1	10.7	19.4	-10.1	-5.7	4.3	2.5
Japan	3,458	1.0	2.6	11.6	6.4	13.3	-7.5	1.9	0.4	4.1
Emerging Markets	984	2.4	2.7	3.9	4.0	9.8	-11.4	-1.7	-1.1	3.1
Asia Pac Ex Japan	514	2.3	2.6	2.6	4.1	12.2	-12.6	-2.3	-1.7	2.8
Asia Ex Japan	632	2.4	2.5	2.9	4.4	11.4	-13.7	-1.8	-2.1	3.5
Australia	834	1.4	3.0	1.0	2.8	15.7	-6.7	-4.8	0.2	-0.6
Hong Kong	9,484	2.9	2.8	-7.9	-2.4	18.2	-17.0	-8.7	0.6	1.2
China H	61	4.2	4.5	-5.0	4.7	13.5	-22.4	-8.4	-5.2	4.5
China A	1,799	1.6	1.8	-3.9	4.7	4.3	-18.2	-8.0	-2.1	0.0
Korea	491	2.7	2.9	17.2	9.7	18.5	-16.3	4.8	-0.9	4.9
Taiwan	598	1.7	1.0	19.2	14.8	9.7	-14.0	7.3	-4.2	3.1
Thailand	362	1.4	8.0	-7.0	-1.6	16.1	-2.8	-3.0	-3.3	4.4
Malaysia	239	0.7	0.4	-9.6	-3.6	14.0	-7.1	-5.4	-1.3	1.0
Singapore	3,025	0.3	1.0	0.4	7.1	10.5	-1.5	-6.5	-0.7	5.0
Indonesia	830	0.0	0.0	10.1	6.5	-3.5	7.8	-3.1	6.7	4.0
India	776	0.5	0.7	1.3	-6.3	2.1	6.8	3.0	4.2	1.2
Philippines	416	2.2	1.4	1.0	2.7	21.2	-13.5	-4.2	1.2	2.7
Local Indices	Latest	1 Day	MTD	YTD	Q4 22	Q3 22	Q2 22	May-23	Apr-23	Mar-23
DJIA	33,763	2.2	2.6	2.9	0.9	16.0	-6.2	-3.2	2.6	2.1
DJIA Nasdaq	33,763 13,101	2.2 1.1	2.6 2.4	2.9 27.0	0.9 17.0	16.0 -0.8	-6.2 -3.9	-3.2 5.9	2.6 0.1	2.1 6.8
DJIA Nasdaq S&P 500	33,763 13,101 4,282	2.2 1.1 1.5	2.6 2.4 2.5	2.9 27.0 12.4	0.9 17.0 7.5	16.0 -0.8 7.6	-6.2 -3.9 -4.9	-3.2 5.9 0.4	2.6 0.1 1.6	2.1 6.8 3.7
DJIA Nasdaq S&P 500 Euro Stoxx 600	33,763 13,101 4,282 462	2.2 1.1 1.5 1.5	2.6 2.4 2.5 2.3	2.9 27.0 12.4 11.3	0.9 17.0 7.5 8.6	16.0 -0.8 7.6 9.9	-6.2 -3.9 -4.9 -4.3	-3.2 5.9 0.4 -2.3	2.6 0.1 1.6 2.6	2.1 6.8 3.7 -0.2
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100	33,763 13,101 4,282 462 7,607	2.2 1.1 1.5 1.5	2.6 2.4 2.5 2.3 2.3	2.9 27.0 12.4 11.3 4.1	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	-3.2 5.9 0.4 -2.3 -4.9	2.6 0.1 1.6 2.6 3.4	2.1 6.8 3.7 -0.2 -2.5
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX	33,763 13,101 4,282 462 7,607 16,051	2.2 1.1 1.5 1.5 1.6 1.2	2.6 2.4 2.5 2.3 2.3 2.5	2.9 27.0 12.4 11.3 4.1 15.3	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	-3.2 5.9 0.4 -2.3 -4.9	2.6 0.1 1.6 2.6 3.4 1.9	2.1 6.8 3.7 -0.2 -2.5 1.7
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40	33,763 13,101 4,282 462 7,607 16,051 7,271	2.2 1.1 1.5 1.5 1.6 1.2	2.6 2.4 2.5 2.3 2.3 2.5 2.5	2.9 27.0 12.4 11.3 4.1 15.3 15.1	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	-3.2 5.9 0.4 -2.3 -4.9 -1.6 -3.9	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
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB	33,763 13,101 4,282 462 7,607 16,051 7,271 27,068	2.2 1.1 1.5 1.5 1.6 1.2 1.9	2.6 2.4 2.5 2.3 2.3 2.5 2.5 3.9	2.9 27.0 12.4 11.3 4.1 15.3 15.1 18.0	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	-3.2 5.9 0.4 -2.3 -4.9 -1.6 -3.9 -2.6	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
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35	33,763 13,101 4,282 462 7,607 16,051 7,271 27,068 9,317	2.2 1.1 1.5 1.5 1.6 1.2 1.9 1.9	2.6 2.4 2.5 2.3 2.3 2.5 2.5 3.9 3.0	2.9 27.0 12.4 11.3 4.1 15.3 15.1 18.0 15.4	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	-3.2 5.9 0.4 -2.3 -4.9 -1.6 -3.9 -2.6 -1.9	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
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	33,763 13,101 4,282 462 7,607 16,051 7,271 27,068 9,317 18,950	2.2 1.1 1.5 1.5 1.6 1.2 1.9 1.9	2.6 2.4 2.5 2.3 2.3 2.5 2.5 3.9 3.0 3.9	2.9 27.0 12.4 11.3 4.1 15.3 15.1 18.0 15.4 -3.3	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	-3.2 5.9 0.4 -2.3 -4.9 -1.6 -3.9 -2.6 -1.9	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
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	33,763 13,101 4,282 462 7,607 16,051 7,271 27,068 9,317 18,950 31,524	2.2 1.1 1.5 1.5 1.6 1.2 1.9 1.9 1.6 4.0	2.6 2.4 2.5 2.3 2.3 2.5 2.5 3.9 3.0 3.9 2.1	2.9 27.0 12.4 11.3 4.1 15.3 15.1 18.0 15.4 -3.3 22.0	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	-3.2 5.9 0.4 -2.3 -4.9 -1.6 -3.9 -2.6 -1.9 -7.9 7.0	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
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	33,763 13,101 4,282 462 7,607 16,051 7,271 27,068 9,317 18,950	2.2 1.1 1.5 1.5 1.6 1.2 1.9 1.9 1.6 4.0 1.2	2.6 2.4 2.5 2.3 2.3 2.5 2.5 3.9 3.0 3.9	2.9 27.0 12.4 11.3 4.1 15.3 15.1 18.0 15.4 -3.3	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	-3.2 5.9 0.4 -2.3 -4.9 -1.6 -3.9 -2.6 -1.9	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
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities	33,763 13,101 4,282 462 7,607 16,051 7,271 27,068 9,317 18,950 31,524	2.2 1.1 1.5 1.5 1.6 1.2 1.9 1.9 1.6 4.0	2.6 2.4 2.5 2.3 2.3 2.5 2.5 3.9 3.0 3.9 2.1	2.9 27.0 12.4 11.3 4.1 15.3 15.1 18.0 15.4 -3.3 22.0	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	-3.2 5.9 0.4 -2.3 -4.9 -1.6 -3.9 -2.6 -1.9 -7.9 7.0	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
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent	33,763 13,101 4,282 462 7,607 16,051 7,271 27,068 9,317 18,950 31,524 343	2.2 1.1 1.5 1.5 1.6 1.2 1.9 1.9 1.6 4.0 1.2	2.6 2.4 2.5 2.3 2.3 2.5 2.5 3.9 3.0 3.9 2.1 0.4	2.9 27.0 12.4 11.3 4.1 15.3 15.1 18.0 15.4 -3.3 22.0 20.1	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	-3.2 5.9 0.4 -2.3 -4.9 -1.6 -3.9 -2.6 -1.9 -7.9 7.0 4.2	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
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	33,763 13,101 4,282 462 7,607 16,051 7,271 27,068 9,317 18,950 31,524 343 Latest	2.2 1.1 1.5 1.5 1.6 1.2 1.9 1.9 1.6 4.0 1.2 0.8 1 Day 2.5 2.3	2.6 2.4 2.5 2.3 2.3 2.5 2.5 3.9 3.0 3.9 2.1 0.4	2.9 27.0 12.4 11.3 4.1 15.3 15.1 18.0 15.4 -3.3 22.0 20.1	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	-3.2 5.9 0.4 -2.3 -4.9 -1.6 -3.9 -2.6 -1.9 -7.9 7.0 4.2 May-23	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
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	33,763 13,101 4,282 462 7,607 16,051 7,271 27,068 9,317 18,950 31,524 343 Latest	2.2 1.1 1.5 1.5 1.6 1.2 1.9 1.9 1.6 4.0 1.2 0.8 1 Day 2.5 2.3 2.2	2.6 2.4 2.5 2.3 2.3 2.5 2.5 3.9 3.0 3.9 2.1 0.4 MTD	2.9 27.0 12.4 11.3 4.1 15.3 15.1 18.0 15.4 -3.3 22.0 20.1 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	-3.2 5.9 0.4 -2.3 -4.9 -1.6 -3.9 -2.6 -1.9 -7.9 7.0 4.2 May-23	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
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	33,763 13,101 4,282 462 7,607 16,051 7,271 27,068 9,317 18,950 31,524 343 Latest 76.1 71.7	2.2 1.1 1.5 1.5 1.6 1.2 1.9 1.9 1.6 4.0 1.2 0.8 1 Day 2.5 2.3	2.6 2.4 2.5 2.3 2.3 2.5 2.5 3.9 3.0 3.9 2.1 0.4 MTD 4.9 5.4	2.9 27.0 12.4 11.3 4.1 15.3 15.1 18.0 15.4 -3.3 22.0 20.1 YTD -11.5 -10.9	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	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	-3.2 -5.9 0.4 -2.3 -4.9 -1.6 -3.9 -2.6 -1.9 -7.9 7.0 4.2 May-23 -8.7 -11.3	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

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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