Daily Bulletin



A Prudential plc company

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아시아 증시는 대체로 상승 마감했습니다. 중국 증시는 5월 수출지표에 투자 심리가 타격을받으면서 상승했고, 한국의 주가는 앤서니 블링컨 미 국무장관이다음 주 중국을 방문할 계획인가운데 2차 전지 기업이 주도한상승이 반도체 및 자동차 섹터의약세를 상쇄하며 상승했습니다.일본 시장은 투자자들이 랠리에대한 신중한 태도로 돌아섰고, 주후반 특별 호가 고정을 앞두고매도세가 이어지며 하락했습니다.

유럽 증시는 유로존 금리 전망에 대한 우려로 하락했지만, Zara 모기업 Inditex의 실적 호조로 소매 기업 및 스페인 증시는 강세를 보였습니다. 소매업과 원유 및 가스주는 각각 1% 이상 상승했습니다. 하지만 북유럽 부동산 그룹인 SBB는 CEO가 사임을 밝힌후 주가의 혼란이 계속되면서 10% 가량 상승했습니다. Danske Bank 주가는 노르웨이 리테일 사업을 매각할 계획이라고 밝히면서 8% 이상 상승했습니다.

미국 증시는 인플레이션 지표와 다음 주 연준 정책회의를 앞두고 투자자들이 신중한 모습을 보인 가운데 5월 중국 수출 지표가 투자 심리에 타격을 주면서 혼조 마감 했습니다. 11개 주요 S&P 500 섹터 중 5개가 통신 서비스가 하락 한 가운데 상승 마감했습니다. Campbell Soup는 3분기 회계 연도 매출 총이익이 감소한 후 8% 하락했습니다. 그러나 뉴욕 기반 온라인 마케팅 기업 Yext는 연간 수익 전망을 상향 조정한 후 40% 넘게 급등했습니다. 미국채 금리는 캐나다 중앙은행이 금리를 인상한 후 상승했는데,이는 다음 주 연준 정책회의 시위원들이 고금리를 더 오래 유지할 것이라고 다시 한 번 말할 수있는 매파적 입장을 유지하는 데도움이 될 수 있는 움직임입니다.

국제 유가는 사우디 아라비아의 대규모 감산 계획이 미국 연료 재고 증가와 중국 수출 지표 약세 로 인한 수요 우려를 상쇄하면서 상승했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q4 22	Q3 22	Q2 22	May-23	Apr-23	Mar-23
World	663	-0.3	2.6	10.7	7.4	9.9	-6.7	-1.0	1.5	3.2
United States	4,053	-0.4	2.2	12.2	7.7	7.1	-4.7	0.7	1.3	3.6
Europe	1,886	0.0	2.4	11.6	10.7	19.4	-10.1	-5.7	4.3	2.5
Japan	3,494	-1.5	3.6	12.7	6.4	13.3	-7.5	1.9	0.4	4.1
Emerging Markets	995	0.7	3.9	5.1	4.0	9.8	-11.4	-1.7	-1.1	3.1
Asia Pac Ex Japan	517	0.6	3.3	3.3	4.1	12.2	-12.6	-2.3	-1.7	2.8
Asia Ex Japan	637	0.7	3.3	3.7	4.4	11.4	-13.7	-1.8	-2.1	3.5
Australia	837	-0.1	3.4	1.4	2.8	15.7	-6.7	-4.8	0.2	-0.6
Hong Kong	9,657	0.7	4.8	-6.1	-2.4	18.2	-17.0	-8.7	0.6	1.2
China H	61	8.0	5.3	-4.2	4.7	13.5	-22.4	-8.4	-5.2	4.5
China A	1,753	-0.5	-0.7	-6.4	4.7	4.3	-18.2	-8.0	-2.1	0.0
Korea	492	0.2	3.2	17.5	9.7	18.5	-16.3	4.8	-0.9	4.9
Taiwan	604	1.1	2.1	20.6	14.8	9.7	-14.0	7.3	-4.2	3.1
Thailand	361	0.6	0.7	-7.1	-1.6	16.1	-2.8	-3.0	-3.3	4.4
Malaysia	238	0.0	-0.2	-10.1	-3.6	14.0	-7.1	-5.4	-1.3	1.0
Singapore	3,050	-0.3	1.8	1.2	7.1	10.5	-1.5	-6.5	-0.7	5.0
Indonesia	830	-0.4	0.1	10.2	6.5	-3.5	7.8	-3.1	6.7	4.0
India	783	0.9	1.7	2.2	-6.3	2.1	6.8	3.0	4.2	1.2
Philippines	418	1.6	2.0	1.5	2.7	21.2	-13.5	-4.2	1.2	2.7
					0400	02.22	02.22	14 00		14
Local Indices	Latest	1 Day	MTD	YTD	Q4 22	Q3 22	Q2 22	May-23	Apr-23	Mar-23
DJIA	Latest 33,665	0.3	2.3	2.6	0.9	16.0	-6.2	-3.2	Apr-23 2.6	Mar-23 2.1
DJIA Nasdaq	33,665 13,105	0.3 -1.3	2.3 1.3	2.6 25.7	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	33,665 13,105 4,268	0.3 -1.3 -0.4	2.3 1.3 2.1	2.6 25.7 12.0	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	33,665 13,105 4,268 461	0.3 -1.3 -0.4 -0.2	2.3 1.3 2.1 2.1	2.6 25.7 12.0 11.0	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	33,665 13,105 4,268 461 7,624	0.3 -1.3 -0.4 -0.2 0.0	2.3 1.3 2.1 2.1 2.5	2.6 25.7 12.0 11.0 4.3	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	33,665 13,105 4,268 461 7,624 15,961	0.3 -1.3 -0.4 -0.2 0.0 -0.2	2.3 1.3 2.1 2.1 2.5 1.9	2.6 25.7 12.0 11.0 4.3 14.6	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 -1.6	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	33,665 13,105 4,268 461 7,624 15,961 7,203	0.3 -1.3 -0.4 -0.2 0.0 -0.2 -0.1	2.3 1.3 2.1 2.1 2.5 1.9 1.6	2.6 25.7 12.0 11.0 4.3 14.6 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	-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	33,665 13,105 4,268 461 7,624 15,961 7,203 27,056	0.3 -1.3 -0.4 -0.2 0.0 -0.2 -0.1	2.3 1.3 2.1 2.1 2.5 1.9 1.6 3.9	2.6 25.7 12.0 11.0 4.3 14.6 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 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	33,665 13,105 4,268 461 7,624 15,961 7,203 27,056 9,360	0.3 -1.3 -0.4 -0.2 0.0 -0.2 -0.1 0.1	2.3 1.3 2.1 2.1 2.5 1.9 1.6 3.9 3.4	2.6 25.7 12.0 11.0 4.3 14.6 14.1 17.9	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 -2.4 -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	33,665 13,105 4,268 461 7,624 15,961 7,203 27,056 9,360 19,252	0.3 -1.3 -0.4 -0.2 0.0 -0.2 -0.1 0.1 0.5 0.9	2.3 1.3 2.1 2.5 1.9 1.6 3.9 3.4 5.8	2.6 25.7 12.0 11.0 4.3 14.6 14.1 17.9 15.9 -1.6	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	33,665 13,105 4,268 461 7,624 15,961 7,203 27,056 9,360 19,252 31,914	0.3 -1.3 -0.4 -0.2 0.0 -0.2 -0.1 0.1 0.5 0.9 -1.8	2.3 1.3 2.1 2.1 2.5 1.9 1.6 3.9 3.4 5.8 3.3	2.6 25.7 12.0 11.0 4.3 14.6 14.1 17.9 15.9 -1.6 23.5	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	-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	33,665 13,105 4,268 461 7,624 15,961 7,203 27,056 9,360 19,252	0.3 -1.3 -0.4 -0.2 0.0 -0.2 -0.1 0.1 0.5 0.9	2.3 1.3 2.1 2.5 1.9 1.6 3.9 3.4 5.8	2.6 25.7 12.0 11.0 4.3 14.6 14.1 17.9 15.9 -1.6	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	33,665 13,105 4,268 461 7,624 15,961 7,203 27,056 9,360 19,252 31,914	0.3 -1.3 -0.4 -0.2 0.0 -0.2 -0.1 0.1 0.5 0.9 -1.8	2.3 1.3 2.1 2.1 2.5 1.9 1.6 3.9 3.4 5.8 3.3	2.6 25.7 12.0 11.0 4.3 14.6 14.1 17.9 15.9 -1.6 23.5	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	-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	33,665 13,105 4,268 461 7,624 15,961 7,203 27,056 9,360 19,252 31,914 343	0.3 -1.3 -0.4 -0.2 0.0 -0.2 -0.1 0.1 0.5 0.9 -1.8 0.3	2.3 1.3 2.1 2.1 2.5 1.9 1.6 3.9 3.4 5.8 3.3 1.1 MTD	2.6 25.7 12.0 11.0 4.3 14.6 14.1 17.9 15.9 -1.6 23.5 21.0	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	-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	33,665 13,105 4,268 461 7,624 15,961 7,203 27,056 9,360 19,252 31,914 343 Latest	0.3 -1.3 -0.4 -0.2 0.0 -0.2 -0.1 0.1 0.5 0.9 -1.8 0.3	2.3 1.3 2.1 2.1 2.5 1.9 1.6 3.9 3.4 5.8 3.3 1.1	2.6 25.7 12.0 11.0 4.3 14.6 14.1 17.9 15.9 -1.6 23.5 21.0	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 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 US 10Y yield	33,665 13,105 4,268 461 7,624 15,961 7,203 27,056 9,360 19,252 31,914 343 Latest	0.3 -1.3 -0.4 -0.2 0.0 -0.2 -0.1 0.1 0.5 0.9 -1.8 0.3 1 Day	2.3 1.3 2.1 2.1 2.5 1.9 1.6 3.9 3.4 5.8 3.3 1.1 MTD	2.6 25.7 12.0 11.0 4.3 14.6 14.1 17.9 15.9 -1.6 23.5 21.0 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	33,665 13,105 4,268 461 7,624 15,961 7,203 27,056 9,360 19,252 31,914 343 Latest 77.0 72.5	0.3 -1.3 -0.4 -0.2 0.0 -0.2 -0.1 0.1 0.5 0.9 -1.8 0.3 1 Day 0.9 1.1	2.3 1.3 2.1 2.1 2.5 1.9 1.6 3.9 3.4 5.8 3.3 1.1 MTD	2.6 25.7 12.0 11.0 4.3 14.6 14.1 17.9 15.9 -1.6 23.5 21.0 YTD -10.5 -9.9	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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