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아시아 증시는 대체로 하락 마감 했습니다. 중국 증시는 업종별 엇갈린 실적 가운데 상승했고, 캐나다 은행의 기습 금리 인상 으로 미국 고금리가 지속될 수 있다는 우려가 다시 떠올랐습니다. 한국의 주가는 중앙은행이 지속적 인 금리 인상에 대해 매파적 입장 을 취하면서 위험선호 심리 약세 로 하락했고 삼성전자 주가는 1% 넘게 하락했습니다. 일본 시장은 기술주가 최근 상승폭을 줄이면서 전일 매도세에 이어 하락했고 Sony Group은 1% 하락했습니다.

유럽 증시는 주요국 중앙은행의 추가 금리 인상 예상으로 금리에 민감한 기술주와 필수소비재가 하락하면서 보합세를 보였습니다. 통신주는 1% 하락한 반면 자동차 주는 1.5% 이상 상승했습니다. Vodafone은 Hutchison과 합병 계약이 막바지 단계에 있다는 보도 이후 5% 이상 급락했습니다. Wizz Air는 이번 회계연도에 3억 7,500만~4억 8,200만 달러의 예상 이익으로 수익성을 회복할 것으로 전망한 후 2% 가까이 상승했습니다. 미국 증시는 기술주 반등으로 모멘텀을 회복하며 상승했고, 다음 주 여러 경제 및 정책 일정을 앞둔 가운데 시장 변동성은 사상 최저치로 떨어졌습니다. 11개 주요 S&P 500 섹터 중 7개가 필수 소비재 주도로 상승세로 마감 했습니다. 고급 전기차 제도 기업 Lucid Group 주가는 중국 사업 책임자인 Zhu Jang이 세계 최대 자동차 시장에 진출할 준비를 하고 있다고 밝힌 후 1% 가량 상승했습니다. 미 국채 금리는 지난주 실업수당 을 새로 청구한 미국인의 수가 급증하면서 경기침체 조짐이 커지는 가운데 노동시장이 둔화 되고 있음을 시사하며 하락 했습니다.

국제 유가는 사우디아라비아의 감산 약속과 미국 금리 인상 중단 가능성으로 인한 공급 부족이 수요 약세와 글로벌 경기 둔화 우려를 상쇄하며 상승했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q4 22	Q3 22	Q2 22	May-23	Apr-23	Mar-23
World	666	0.5	3.1	11.2	7.4	9.9	-6.7	-1.0	1.5	3.2
United States	4,079	0.6	2.8	12.9	7.7	7.1	-4.7	0.7	1.3	3.6
Europe	1,897	0.6	3.0	12.2	10.7	19.4	-10.1	-5.7	4.3	2.5
Japan	3,490	-0.1	3.5	12.6	6.4	13.3	-7.5	1.9	0.4	4.1
Emerging Markets	994	-0.1	3.8	5.0	4.0	9.8	-11.4	-1.7	-1.1	3.1
Asia Pac Ex Japan	517	0.0	3.3	3.3	4.1	12.2	-12.6	-2.3	-1.7	2.8
Asia Ex Japan	637	-0.1	3.2	3.6	4.4	11.4	-13.7	-1.8	-2.1	3.5
Australia	842	0.5	3.9	2.0	2.8	15.7	-6.7	-4.8	0.2	-0.6
Hong Kong	9,722	0.7	5.5	-5.5	-2.4	18.2	-17.0	-8.7	0.6	1.2
China H	61	0.4	5.7	-3.8	4.7	13.5	-22.4	-8.4	-5.2	4.5
China A	1,767	0.8	0.1	-5.6	4.7	4.3	-18.2	-8.0	-2.1	0.0
Korea	491	-0.2	3.0	17.3	9.7	18.5	-16.3	4.8	-0.9	4.9
Taiwan	596	-1.4	0.7	18.9	14.8	9.7	-14.0	7.3	-4.2	3.1
Thailand	368	1.7	2.5	-5.5	-1.6	16.1	-2.8	-3.0	-3.3	4.4
Malaysia	236	-0.8	-1.0	-10.8	-3.6	14.0	-7.1	-5.4	-1.3	1.0
Singapore	3,084	1.1	2.9	2.3	7.1	10.5	-1.5	-6.5	-0.7	5.0
Indonesia	836	0.7	0.8	10.9	6.5	-3.5	7.8	-3.1	6.7	4.0
India	778	-0.6	1.0	1.6	-6.3	2.1	6.8	3.0	4.2	1.2
Philippines	417	-0.4	1.6	1.2	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
DJA	33,834	0.5	2.9	3.1	0.9	16.0	-6.2	-3.2	2.6	2.1
DJA Nasdaq	33,834 13,239	0.5 1.0	2.9 2.4	3.1 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
DJA Nasdaq S&P 500	33,834 13,239 4,294	0.5 1.0 0.6	2.9 2.4 2.8	3.1 27.0 12.7	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
DJA Nasdaq S&P 500 Euro Stoxx 600	33,834 13,239 4,294 461	0.5 1.0 0.6 0.0	2.9 2.4 2.8 2.1	3.1 27.0 12.7 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
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100	33,834 13,239 4,294 461 7,600	0.5 1.0 0.6 0.0 -0.2	2.9 2.4 2.8 2.1 2.3	3.1 27.0 12.7 11.0 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
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX	33,834 13,239 4,294 461 7,600 15,990	0.5 1.0 0.6 0.0 -0.2 0.2	2.9 2.4 2.8 2.1 2.3 2.1	3.1 27.0 12.7 11.0 4.1 14.8	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
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40	33,834 13,239 4,294 461 7,600 15,990 7,222	0.5 1.0 0.6 0.0 -0.2 0.2 0.3	2.9 2.4 2.8 2.1 2.3 2.1 1.8	3.1 27.0 12.7 11.0 4.1 14.8 14.4	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	-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
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB	33,834 13,239 4,294 461 7,600 15,990 7,222 27,275	0.5 1.0 0.6 0.0 -0.2 0.2 0.3 0.8	2.9 2.4 2.8 2.1 2.3 2.1 1.8 4.7	3.1 27.0 12.7 11.0 4.1 14.8 14.4 18.9	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	-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 1.2	2.1 6.8 3.7 -0.2 -2.5 1.7 0.9 -1.2
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35	33,834 13,239 4,294 461 7,600 15,990 7,222 27,275 9,338	0.5 1.0 0.6 0.0 -0.2 0.2 0.3 0.8 -0.2	2.9 2.4 2.8 2.1 2.3 2.1 1.8 4.7 3.2	3.1 27.0 12.7 11.0 4.1 14.8 14.4 18.9 15.6	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 12.8	-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 1.3	2.1 6.8 3.7 -0.2 -2.5 1.7 0.9 -1.2 -1.7
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	33,834 13,239 4,294 461 7,600 15,990 7,222 27,275 9,338 19,299	0.5 1.0 0.6 0.0 -0.2 0.2 0.3 0.8 -0.2 0.4	2.9 2.4 2.8 2.1 2.3 2.1 1.8 4.7 3.2 6.2	3.1 27.0 12.7 11.0 4.1 14.8 14.4 18.9 15.6 -1.2	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	-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 -7.9	2.6 0.1 1.6 2.6 3.4 1.9 3.0 1.2 1.3 -2.4	2.1 6.8 3.7 -0.2 -2.5 1.7 0.9 -1.2 -1.7 3.5
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	33,834 13,239 4,294 461 7,600 15,990 7,222 27,275 9,338 19,299 31,641	0.5 1.0 0.6 0.0 -0.2 0.2 0.3 0.8 -0.2 0.4 -0.9	2.9 2.4 2.8 2.1 2.3 2.1 1.8 4.7 3.2 6.2 2.4	3.1 27.0 12.7 11.0 4.1 14.8 14.4 18.9 15.6 -1.2 22.5	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
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	33,834 13,239 4,294 461 7,600 15,990 7,222 27,275 9,338 19,299	0.5 1.0 0.6 0.0 -0.2 0.2 0.3 0.8 -0.2 0.4	2.9 2.4 2.8 2.1 2.3 2.1 1.8 4.7 3.2 6.2	3.1 27.0 12.7 11.0 4.1 14.8 14.4 18.9 15.6 -1.2	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	-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 -7.9	2.6 0.1 1.6 2.6 3.4 1.9 3.0 1.2 1.3 -2.4	2.1 6.8 3.7 -0.2 -2.5 1.7 0.9 -1.2 -1.7 3.5
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	33,834 13,239 4,294 461 7,600 15,990 7,222 27,275 9,338 19,299 31,641	0.5 1.0 0.6 0.0 -0.2 0.2 0.3 0.8 -0.2 0.4 -0.9	2.9 2.4 2.8 2.1 2.3 2.1 1.8 4.7 3.2 6.2 2.4	3.1 27.0 12.7 11.0 4.1 14.8 14.4 18.9 15.6 -1.2 22.5	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
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent	33,834 13,239 4,294 461 7,600 15,990 7,222 27,275 9,338 19,299 31,641 343 Latest 77.2	0.5 1.0 0.6 0.0 -0.2 0.2 0.3 0.8 -0.2 0.4 -0.9 -0.6 1 Day 0.3	2.9 2.4 2.8 2.1 2.3 2.1 1.8 4.7 3.2 6.2 2.4 0.5 MTD 6.3	3.1 27.0 12.7 11.0 4.1 14.8 14.4 18.9 15.6 -1.2 22.5 20.2 YTD -10.2	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	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	-6.2 -3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -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 -8.7	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	2.1 6.8 3.7 -0.2 -2.5 1.7 0.9 -1.2 -1.7 3.5 3.1 1.4 Mar-23 -4.9
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	33,834 13,239 4,294 461 7,600 15,990 7,222 27,275 9,338 19,299 31,641 343 Latest	0.5 1.0 0.6 0.0 -0.2 0.2 0.3 0.8 -0.2 0.4 -0.9 -0.6 1 Day	2.9 2.4 2.8 2.1 2.3 2.1 1.8 4.7 3.2 6.2 2.4 0.5 MTD	3.1 27.0 12.7 11.0 4.1 14.8 14.4 18.9 15.6 -1.2 22.5 20.2 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 -2.5 -2.4 -8.3 -20.1 -0.8 -8.1 Q2 22	-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 2.9 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
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	33,834 13,239 4,294 461 7,600 15,990 7,222 27,275 9,338 19,299 31,641 343 Latest 77.2	0.5 1.0 0.6 0.0 -0.2 0.2 0.3 0.8 -0.2 0.4 -0.9 -0.6 1 Day 0.3	2.9 2.4 2.8 2.1 2.3 2.1 1.8 4.7 3.2 6.2 2.4 0.5 MTD 6.3	3.1 27.0 12.7 11.0 4.1 14.8 14.4 18.9 15.6 -1.2 22.5 20.2 YTD -10.2	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	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	-6.2 -3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -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 -8.7	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	2.1 6.8 3.7 -0.2 -2.5 1.7 0.9 -1.2 -1.7 3.5 3.1 1.4 Mar-23 -4.9
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	33,834 13,239 4,294 461 7,600 15,990 7,222 27,275 9,338 19,299 31,641 343 Latest 77.2 72.7	0.5 1.0 0.6 0.0 -0.2 0.2 0.3 0.8 -0.2 0.4 -0.9 -0.6 1 Day 0.3 0.3	2.9 2.4 2.8 2.1 2.3 2.1 1.8 4.7 3.2 6.2 2.4 0.5 MTD 6.3 6.8	3.1 27.0 12.7 11.0 4.1 14.8 14.4 18.9 15.6 -1.2 22.5 20.2 YTD -10.2 -9.7	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 -2.5 -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 2.9 Apr-23 0.1 2.6	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 -4.9 -2.9

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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