## **Daily Bulletin**



A Prudential plc company

20 November 2023

STOCKS | BONDS | INTEREST RATES | COMMODITIES | CURRENCIES

아시아 증시는 대체로 상승 마감 했습니다. 중국 증시는 미국 경제 데이터가 완화되면서 상승했지만 알리바바 그룹은 클라우드 사업 분사 계획을 폐기한 후 약 10% 하락했습니다. 일본 시장은 막 막을 내린 강력한 국내 실적 시즌에 힘입어 상승했고 일본 항공은 2% 이상 상승했습니다. 호주 증시는 국내 고용 보고서 호조로 중앙은행의 금리 인상 가능성에 대한 우려가 커지면서 하락했습니다.

유럽 증시는 금융주와 헬스케어 관련주에 힘입어 상승 마감했으며, 중앙은행들이 내년에 공격적으로 금리를 인하할 것이라는 낙관론이 커졌습니다. 금융서비스와 광업주는 각각 1.5% 이상 상승했으며, 모든 섹터와 주요 증권주가 상승 세를 보였습니다. Anima Holding은 스위스 민간은행인 Julius Bear로부터 소규모 동종 기업인 카이로스를 모두 인수하는 구속력 있는 계약을 체결한 후 1% 가량 올랐습니다.

미국 증시는 투자자들이 최근의 상승분을 소화하고, 연준 관계자들의 발언으로 중앙은행이 언제 금리 인하를 시작할 수 있을지에 대한 전망이 흐려지면서 소폭 상승했습니다. 에너지 부문의 상승으로 11개의 주요 S&P500 부문 중 6개 부문이 상승 마감했습니다. Tenet Healthcare 는 사우스 캐롤라이나 주 병원 세 곳을 Novant Health에 매각 하겠다고 밝힌 후 11% 이상 급등했습니다. 그러나 Charge PointHoldings는 회사가 3분기 매출 추정치를 하향 조정함에 따라 36% 이상 하락했습니다. 미 국채 금리는 투자자들이 연준의 금리 인상 캠페인이 마침내 끝날 수 있다는 데에 베팅하면서 하락 했습니다. 한편 벤치마크인 10년 만기 국채수익률은 4.4%를 기록했습니다.

국제 유가는 숏 표지션을 취한 투자자들이 차익실현에 나서고, 일부 러시아 원유 선사들에 대한 미국의 제재가 지지를 보내면서 약 4% 급등했습니다.

| MSCI  | Latest   | 1 Day   | MTD  | YTD  | Q3 23  | Q2 23  | Q1 23  | Oct-23  | Sep-23   | Aug-23   |
|---|--|---|--|--|--|--|--|---|--|--|
| World   | 686  | 0.3   | 7.8  | 15.6   | -3.3   | 6.3  | 7.4  | -3.0  | -4.1   | -2.8   |
| <b>United States</b>  | 4,296  | 0.2   | 7.9  | 19.7   | -3.1   | 8.7  | 7.7  | -2.3  | -4.7   | -1.7   |
| Europe  | 1,896  | 1.1   | 8.2  | 13.1   | -4.9   | 3.1  | 10.7   | -3.7  | -4.0   | -4.0   |
| Japan   | 3,538  | 1.4   | 8.3  | 15.4   | -1.5   | 6.4  | 6.4  | -4.5  | -2.0   | -2.4   |
| Emerging Markets  | 977  | -0.6  | 6.8  | 4.8  | -2.8   | 1.0  | 4.0  | -3.9  | -2.6   | -6.1   |
| Asia Pac Ex Japan   | 501  | -0.6  | 6.2  | 1.7  | -3.3   | -0.9   | 4.1  | -4.1  | -2.7   | -6.1   |
| Asia Ex Japan   | 615  | -0.7  | 6.0  | 1.8  | -3.2   | -1.1   | 4.4  | -3.9  | -2.6   | -6.4   |
| Australia   | 819  | 0.2   | 7.2  | 1.4  | -3.3   | 0.3  | 2.8  | -5.1  | -2.9   | -4.3   |
| Hong Kong   | 8,554  | -0.7  | 4.8  | -15.4  | -11.1  | -5.0   | -2.4   | -2.1  | -5.4   | -8.6   |
| China H   | 57   | -1.9  | 2.6  | -8.8   | -1.8   | -9.6   | 4.7  | -4.3  | -2.7   | -9.0   |
| China A   | 1,632  | 0.4   | 2.2  | -11.2  | -3.4   | -10.6  | 4.7  | -3.8  | -1.8   | -7.9   |
| Korea   | 469  | -0.8  | 13.4   | 12.9   | -6.6   | 4.5  | 9.7  | -7.0  | -5.1   | -7.6   |
| Taiwan  | 590  | 0.6   | 10.1   | 21.1   | -7.1   | 4.8  | 14.8   | -1.7  | -3.7   | -4.4   |
| Thailand  | 337  | 0.8   | 4.5  | -12.6  | -4.4   | -8.1   | -1.6   | -3.2  | -9.1   | -2.7   |
| Malaysia  | 247  | -0.1  | 3.0  | -5.0   | 4.5  | -8.4   | -3.6   | -0.1  | -1.7   | -3.1   |
| Singapore   | 2,930  | 0.2   | 3.5  | -0.5   | -0.3   | -5.6   | 7.1  | -4.6  | -0.4   | -8.5   |
| Indonesia   | 772  | 0.1   | 5.9  | 3.2  | -3.3   | 3.2  | 6.5  | -8.3  | -3.3   | -1.4   |
| India   | 836  | 0.0   | 4.6  | 9.9  | 2.9  | 12.4   | -6.3   | -3.0  | 1.7  | -1.9   |
| Philippines   | 404  | 0.6   | 6.9  | -1.3   | -3.5   | -1.1   | 2.7  | -5.7  | 2.9  | -9.2   |
|   |  |   |  |  |  |  |  |   |  |  |
| Local Indices   | Latest   | 1 Day   | MTD  | YTD  | Q3 23  | Q2 23  | Q1 23  | Oct-23  | Sep-23   | Aug-23   |
| DJIA  | 34,947   | 0.0   | 5.9  | 7.5  | -2.1   | 4.0  | 0.9  | -1.3  | -3.4   | -2.0   |
| DJIA<br>Nasdaq  | 34,947<br>14,125   |   | 5.9<br>10.0  |  | -2.1<br>-3.9   | 4.0<br>13.1  | 0.9<br>17.0  | -1.3<br>-2.8  | *  |  |
| DJIA<br>Nasdaq<br>S&P 500   | 34,947<br>14,125<br>4,514  | 0.0<br>0.1<br>0.1   | 5.9<br>10.0<br>7.8   | 7.5<br>36.0<br>19.3  | -2.1<br>-3.9<br>-3.3   | 4.0<br>13.1<br>8.7   | 0.9<br>17.0<br>7.5   | -1.3<br>-2.8<br>-2.1  | -3.4<br>-5.8<br>-4.8   | -2.0<br>-2.1<br>-1.6   |
| DJIA<br>Nasdaq<br>S&P 500<br>Euro Stoxx 600   | 34,947<br>14,125<br>4,514<br>456   | 0.0<br>0.1<br>0.1<br>1.0  | 5.9<br>10.0<br>7.8<br>5.2  | 7.5<br>36.0<br>19.3<br>10.7  | -2.1<br>-3.9<br>-3.3<br>-2.1   | 4.0<br>13.1<br>8.7<br>2.7  | 0.9<br>17.0<br>7.5<br>8.6  | -1.3<br>-2.8<br>-2.1<br>-3.6  | -3.4<br>-5.8<br>-4.8<br>-1.6   | -2.0<br>-2.1<br>-1.6<br>-2.5   |
| DJIA<br>Nasdaq<br>S&P 500<br>Euro Stoxx 600<br>FTSE100  | 34,947<br>14,125<br>4,514<br>456<br>7,504  | 0.0<br>0.1<br>0.1<br>1.0<br>1.3   | 5.9<br>10.0<br>7.8<br>5.2<br>2.8   | 7.5<br>36.0<br>19.3<br>10.7<br>4.5   | -2.1<br>-3.9<br>-3.3<br>-2.1<br>2.2  | 4.0<br>13.1<br>8.7<br>2.7<br>-0.3  | 0.9<br>17.0<br>7.5<br>8.6<br>3.6   | -1.3<br>-2.8<br>-2.1<br>-3.6<br>-3.7  | -3.4<br>-5.8<br>-4.8<br>-1.6<br>2.4  | -2.0<br>-2.1<br>-1.6<br>-2.5<br>-2.5   |
| DJIA<br>Nasdaq<br>S&P 500<br>Euro Stoxx 600<br>FTSE100<br>DAX   | 34,947<br>14,125<br>4,514<br>456<br>7,504<br>15,919  | 0.0<br>0.1<br>0.1<br>1.0<br>1.3<br>0.8  | 5.9<br>10.0<br>7.8<br>5.2<br>2.8<br>7.5  | 7.5<br>36.0<br>19.3<br>10.7<br>4.5<br>14.3   | -2.1<br>-3.9<br>-3.3<br>-2.1<br>2.2<br>-4.7  | 4.0<br>13.1<br>8.7<br>2.7<br>-0.3<br>3.3   | 0.9<br>17.0<br>7.5<br>8.6<br>3.6<br>12.2   | -1.3<br>-2.8<br>-2.1<br>-3.6<br>-3.7  | -3.4<br>-5.8<br>-4.8<br>-1.6<br>2.4<br>-3.5  | -2.0<br>-2.1<br>-1.6<br>-2.5<br>-2.5<br>-3.0   |
| DJIA<br>Nasdaq<br>S&P 500<br>Euro Stoxx 600<br>FTSE100<br>DAX<br>CAC 40   | 34,947<br>14,125<br>4,514<br>456<br>7,504<br>15,919<br>7,234   | 0.0<br>0.1<br>0.1<br>1.0<br>1.3<br>0.8<br>0.9   | 5.9<br>10.0<br>7.8<br>5.2<br>2.8<br>7.5<br>5.1   | 7.5<br>36.0<br>19.3<br>10.7<br>4.5<br>14.3   | -2.1<br>-3.9<br>-3.3<br>-2.1<br>2.2<br>-4.7<br>-3.4  | 4.0<br>13.1<br>8.7<br>2.7<br>-0.3<br>3.3<br>3.5  | 0.9<br>17.0<br>7.5<br>8.6<br>3.6<br>12.2<br>13.4   | -1.3<br>-2.8<br>-2.1<br>-3.6<br>-3.7<br>-3.7  | -3.4<br>-5.8<br>-4.8<br>-1.6<br>2.4<br>-3.5<br>-2.4  | -2.0<br>-2.1<br>-1.6<br>-2.5<br>-2.5<br>-3.0<br>-2.4   |
| DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB  | 34,947<br>14,125<br>4,514<br>456<br>7,504<br>15,919<br>7,234<br>29,498                                     | 0.0<br>0.1<br>0.1<br>1.0<br>1.3<br>0.8<br>0.9   | 5.9<br>10.0<br>7.8<br>5.2<br>2.8<br>7.5<br>5.1<br>6.3                                    | 7.5<br>36.0<br>19.3<br>10.7<br>4.5<br>14.3<br>15.0<br>29.5                                 | -2.1<br>-3.9<br>-3.3<br>-2.1<br>2.2<br>-4.7<br>-3.4<br>0.6   | 4.0<br>13.1<br>8.7<br>2.7<br>-0.3<br>3.3<br>3.5<br>7.2   | 0.9<br>17.0<br>7.5<br>8.6<br>3.6<br>12.2<br>13.4   | -1.3<br>-2.8<br>-2.1<br>-3.6<br>-3.7<br>-3.7<br>-3.5<br>-1.8  | -3.4<br>-5.8<br>-4.8<br>-1.6<br>2.4<br>-3.5<br>-2.4<br>-1.9  | -2.0<br>-2.1<br>-1.6<br>-2.5<br>-2.5<br>-3.0<br>-2.4<br>-2.7   |
| DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35  | 34,947<br>14,125<br>4,514<br>456<br>7,504<br>15,919<br>7,234<br>29,498<br>9,761                            | 0.0<br>0.1<br>0.1<br>1.0<br>1.3<br>0.8<br>0.9<br>0.8  | 5.9<br>10.0<br>7.8<br>5.2<br>2.8<br>7.5<br>5.1<br>6.3<br>8.3                             | 7.5<br>36.0<br>19.3<br>10.7<br>4.5<br>14.3<br>15.0<br>29.5<br>23.3                         | -2.1<br>-3.9<br>-3.3<br>-2.1<br>2.2<br>-4.7<br>-3.4<br>0.6<br>-0.8   | 4.0<br>13.1<br>8.7<br>2.7<br>-0.3<br>3.3<br>3.5<br>7.2<br>5.8  | 0.9<br>17.0<br>7.5<br>8.6<br>3.6<br>12.2<br>13.4<br>15.1<br>12.8                                       | -1.3<br>-2.8<br>-2.1<br>-3.6<br>-3.7<br>-3.7<br>-3.5<br>-1.8<br>-3.8  | -3.4<br>-5.8<br>-4.8<br>-1.6<br>2.4<br>-3.5<br>-2.4<br>-1.9  | -2.0<br>-2.1<br>-1.6<br>-2.5<br>-2.5<br>-3.0<br>-2.4<br>-2.7   |
| DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng  | 34,947<br>14,125<br>4,514<br>456<br>7,504<br>15,919<br>7,234<br>29,498<br>9,761<br>17,472                  | 0.0<br>0.1<br>0.1<br>1.0<br>1.3<br>0.8<br>0.9<br>0.8<br>1.0   | 5.9<br>10.0<br>7.8<br>5.2<br>2.8<br>7.5<br>5.1<br>6.3<br>8.3<br>2.2                      | 7.5<br>36.0<br>19.3<br>10.7<br>4.5<br>14.3<br>15.0<br>29.5<br>23.3<br>-8.5                 | -2.1<br>-3.9<br>-3.3<br>-2.1<br>2.2<br>-4.7<br>-3.4<br>0.6<br>-0.8<br>-4.2   | 4.0<br>13.1<br>8.7<br>2.7<br>-0.3<br>3.3<br>3.5<br>7.2<br>5.8  | 0.9<br>17.0<br>7.5<br>8.6<br>3.6<br>12.2<br>13.4<br>15.1<br>12.8<br>3.5                                | -1.3<br>-2.8<br>-2.1<br>-3.6<br>-3.7<br>-3.7<br>-3.5<br>-1.8<br>-3.8<br>-3.9                                    | -3.4<br>-5.8<br>-4.8<br>-1.6<br>2.4<br>-3.5<br>-2.4<br>-1.9<br>-0.8  | -2.0<br>-2.1<br>-1.6<br>-2.5<br>-2.5<br>-3.0<br>-2.4<br>-2.7<br>-1.4<br>-8.2                           |
| DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei                                       | 34,947<br>14,125<br>4,514<br>456<br>7,504<br>15,919<br>7,234<br>29,498<br>9,761<br>17,472<br>33,585        | 0.0<br>0.1<br>0.1<br>1.0<br>1.3<br>0.8<br>0.9<br>0.8<br>1.0<br>-2.1<br>0.5                                | 5.9<br>10.0<br>7.8<br>5.2<br>2.8<br>7.5<br>5.1<br>6.3<br>8.3<br>2.2<br>8.8               | 7.5<br>36.0<br>19.3<br>10.7<br>4.5<br>14.3<br>15.0<br>29.5<br>23.3<br>-8.5<br>31.2         | -2.1<br>-3.9<br>-3.3<br>-2.1<br>2.2<br>-4.7<br>-3.4<br>0.6<br>-0.8<br>-4.2<br>-3.3   | 4.0<br>13.1<br>8.7<br>2.7<br>-0.3<br>3.3<br>3.5<br>7.2<br>5.8<br>-6.0<br>18.5  | 0.9<br>17.0<br>7.5<br>8.6<br>3.6<br>12.2<br>13.4<br>15.1<br>12.8<br>3.5                                | -1.3<br>-2.8<br>-2.1<br>-3.6<br>-3.7<br>-3.7<br>-3.5<br>-1.8<br>-3.8<br>-3.9<br>-3.1                            | -3.4<br>-5.8<br>-4.8<br>-1.6<br>2.4<br>-3.5<br>-2.4<br>-1.9<br>-0.8<br>-2.6<br>-1.6                          | -2.0<br>-2.1<br>-1.6<br>-2.5<br>-2.5<br>-3.0<br>-2.4<br>-2.7<br>-1.4<br>-8.2<br>-1.6                   |
| DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng  | 34,947<br>14,125<br>4,514<br>456<br>7,504<br>15,919<br>7,234<br>29,498<br>9,761<br>17,472                  | 0.0<br>0.1<br>0.1<br>1.0<br>1.3<br>0.8<br>0.9<br>0.8<br>1.0   | 5.9<br>10.0<br>7.8<br>5.2<br>2.8<br>7.5<br>5.1<br>6.3<br>8.3<br>2.2                      | 7.5<br>36.0<br>19.3<br>10.7<br>4.5<br>14.3<br>15.0<br>29.5<br>23.3<br>-8.5                 | -2.1<br>-3.9<br>-3.3<br>-2.1<br>2.2<br>-4.7<br>-3.4<br>0.6<br>-0.8<br>-4.2   | 4.0<br>13.1<br>8.7<br>2.7<br>-0.3<br>3.3<br>3.5<br>7.2<br>5.8  | 0.9<br>17.0<br>7.5<br>8.6<br>3.6<br>12.2<br>13.4<br>15.1<br>12.8<br>3.5                                | -1.3<br>-2.8<br>-2.1<br>-3.6<br>-3.7<br>-3.7<br>-3.5<br>-1.8<br>-3.8<br>-3.9                                    | -3.4<br>-5.8<br>-4.8<br>-1.6<br>2.4<br>-3.5<br>-2.4<br>-1.9<br>-0.8  | -2.0<br>-2.1<br>-1.6<br>-2.5<br>-2.5<br>-3.0<br>-2.4<br>-2.7<br>-1.4<br>-8.2                           |
| DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei                                       | 34,947<br>14,125<br>4,514<br>456<br>7,504<br>15,919<br>7,234<br>29,498<br>9,761<br>17,472<br>33,585        | 0.0<br>0.1<br>0.1<br>1.0<br>1.3<br>0.8<br>0.9<br>0.8<br>1.0<br>-2.1<br>0.5                                | 5.9<br>10.0<br>7.8<br>5.2<br>2.8<br>7.5<br>5.1<br>6.3<br>8.3<br>2.2<br>8.8               | 7.5<br>36.0<br>19.3<br>10.7<br>4.5<br>14.3<br>15.0<br>29.5<br>23.3<br>-8.5<br>31.2         | -2.1<br>-3.9<br>-3.3<br>-2.1<br>2.2<br>-4.7<br>-3.4<br>0.6<br>-0.8<br>-4.2<br>-3.3   | 4.0<br>13.1<br>8.7<br>2.7<br>-0.3<br>3.3<br>3.5<br>7.2<br>5.8<br>-6.0<br>18.5  | 0.9<br>17.0<br>7.5<br>8.6<br>3.6<br>12.2<br>13.4<br>15.1<br>12.8<br>3.5                                | -1.3<br>-2.8<br>-2.1<br>-3.6<br>-3.7<br>-3.7<br>-3.5<br>-1.8<br>-3.8<br>-3.9<br>-3.1                            | -3.4<br>-5.8<br>-4.8<br>-1.6<br>2.4<br>-3.5<br>-2.4<br>-1.9<br>-0.8<br>-2.6<br>-1.6                          | -2.0<br>-2.1<br>-1.6<br>-2.5<br>-2.5<br>-3.0<br>-2.4<br>-2.7<br>-1.4<br>-8.2<br>-1.6                   |
| DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent     | 34,947<br>14,125<br>4,514<br>456<br>7,504<br>15,919<br>7,234<br>29,498<br>9,761<br>17,472<br>33,585<br>332 | 0.0<br>0.1<br>0.1<br>1.0<br>1.3<br>0.8<br>0.9<br>0.8<br>1.0<br>-2.1<br>0.5<br>-0.9                        | 5.9<br>10.0<br>7.8<br>5.2<br>2.8<br>7.5<br>5.1<br>6.3<br>8.3<br>2.2<br>8.8<br>8.2        | 7.5<br>36.0<br>19.3<br>10.7<br>4.5<br>14.3<br>15.0<br>29.5<br>23.3<br>-8.5<br>31.2<br>15.3 | -2.1<br>-3.9<br>-3.3<br>-2.1<br>2.2<br>-4.7<br>-3.4<br>0.6<br>-0.8<br>-4.2<br>-3.3<br>-3.9                                 | 4.0<br>13.1<br>8.7<br>2.7<br>-0.3<br>3.3<br>3.5<br>7.2<br>5.8<br>-6.0<br>18.5<br>6.9                                 | 0.9<br>17.0<br>7.5<br>8.6<br>3.6<br>12.2<br>13.4<br>15.1<br>12.8<br>3.5<br>8.5                         | -1.3<br>-2.8<br>-2.1<br>-3.6<br>-3.7<br>-3.7<br>-3.5<br>-1.8<br>-3.8<br>-3.9<br>-3.1<br>-7.0                    | -3.4<br>-5.8<br>-4.8<br>-1.6<br>2.4<br>-3.5<br>-2.4<br>-1.9<br>-0.8<br>-2.6<br>-1.6<br>-3.9                  | -2.0<br>-2.1<br>-1.6<br>-2.5<br>-2.5<br>-3.0<br>-2.4<br>-2.7<br>-1.4<br>-8.2<br>-1.6<br>-4.7           |
| DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities           | 34,947 14,125 4,514 456 7,504 15,919 7,234 29,498 9,761 17,472 33,585 332 Latest                           | 0.0<br>0.1<br>0.1<br>1.0<br>1.3<br>0.8<br>0.9<br>0.8<br>1.0<br>-2.1<br>0.5<br>-0.9                        | 5.9<br>10.0<br>7.8<br>5.2<br>2.8<br>7.5<br>5.1<br>6.3<br>8.3<br>2.2<br>8.8<br>8.2        | 7.5 36.0 19.3 10.7 4.5 14.3 15.0 29.5 23.3 -8.5 31.2 15.3 YTD                              | -2.1<br>-3.9<br>-3.3<br>-2.1<br>2.2<br>-4.7<br>-3.4<br>0.6<br>-0.8<br>-4.2<br>-3.3<br>-3.9                                 | 4.0<br>13.1<br>8.7<br>2.7<br>-0.3<br>3.3<br>3.5<br>7.2<br>5.8<br>-6.0<br>18.5<br>6.9                                 | 0.9<br>17.0<br>7.5<br>8.6<br>3.6<br>12.2<br>13.4<br>15.1<br>12.8<br>3.5<br>8.5<br>11.5                 | -1.3<br>-2.8<br>-2.1<br>-3.6<br>-3.7<br>-3.5<br>-1.8<br>-3.8<br>-3.9<br>-3.1<br>-7.0                            | -3.4<br>-5.8<br>-4.8<br>-1.6<br>2.4<br>-3.5<br>-2.4<br>-1.9<br>-0.8<br>-2.6<br>-1.6<br>-3.9<br>Sep-23        | -2.0<br>-2.1<br>-1.6<br>-2.5<br>-2.5<br>-3.0<br>-2.4<br>-2.7<br>-1.4<br>-8.2<br>-1.6<br>-4.7<br>Aug-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     | 34,947 14,125 4,514 456 7,504 15,919 7,234 29,498 9,761 17,472 33,585 332 Latest 80.6                      | 0.0<br>0.1<br>0.1<br>1.0<br>1.3<br>0.8<br>0.9<br>0.8<br>1.0<br>-2.1<br>0.5<br>-0.9<br>1 Day               | 5.9<br>10.0<br>7.8<br>5.2<br>2.8<br>7.5<br>5.1<br>6.3<br>8.3<br>2.2<br>8.8<br>8.2<br>MTD | 7.5 36.0 19.3 10.7 4.5 14.3 15.0 29.5 23.3 -8.5 31.2 15.3 YTD -6.3                         | -2.1<br>-3.9<br>-3.3<br>-2.1<br>2.2<br>-4.7<br>-3.4<br>0.6<br>-0.8<br>-4.2<br>-3.3<br>-3.9<br><b>Q3 23</b>                 | 4.0<br>13.1<br>8.7<br>2.7<br>-0.3<br>3.3<br>3.5<br>7.2<br>5.8<br>-6.0<br>18.5<br>6.9<br><b>Q2 23</b>                 | 0.9<br>17.0<br>7.5<br>8.6<br>3.6<br>12.2<br>13.4<br>15.1<br>12.8<br>3.5<br>8.5<br>11.5<br><b>Q1 23</b> | -1.3<br>-2.8<br>-2.1<br>-3.6<br>-3.7<br>-3.5<br>-1.8<br>-3.8<br>-3.9<br>-3.1<br>-7.0<br>Oct-23                  | -3.4<br>-5.8<br>-4.8<br>-1.6<br>2.4<br>-3.5<br>-2.4<br>-1.9<br>-0.8<br>-2.6<br>-1.6<br>-3.9<br><b>Sep-23</b> | -2.0<br>-2.1<br>-1.6<br>-2.5<br>-2.5<br>-3.0<br>-2.4<br>-2.7<br>-1.4<br>-8.2<br>-1.6<br>-4.7<br>Aug-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 | 34,947 14,125 4,514 456 7,504 15,919 7,234 29,498 9,761 17,472 33,585 332 Latest 80.6 75.9                 | 0.0<br>0.1<br>0.1<br>1.0<br>1.3<br>0.8<br>0.9<br>0.8<br>1.0<br>-2.1<br>0.5<br>-0.9<br>1 Day<br>4.0<br>4.1 | 5.9<br>10.0<br>7.8<br>5.2<br>2.8<br>7.5<br>5.1<br>6.3<br>8.3<br>2.2<br>8.8<br>8.2<br>MTD | 7.5 36.0 19.3 10.7 4.5 14.3 15.0 29.5 23.3 -8.5 31.2 15.3 YTD -6.3 -5.7                    | -2.1<br>-3.9<br>-3.3<br>-2.1<br>2.2<br>-4.7<br>-3.4<br>0.6<br>-0.8<br>-4.2<br>-3.3<br>-3.9<br><b>Q3 23</b><br>23.1<br>28.5 | 4.0<br>13.1<br>8.7<br>2.7<br>-0.3<br>3.3<br>3.5<br>7.2<br>5.8<br>-6.0<br>18.5<br>6.9<br><b>Q2 23</b><br>-5.8<br>-5.6 | 0.9<br>17.0<br>7.5<br>8.6<br>3.6<br>12.2<br>13.4<br>15.1<br>12.8<br>3.5<br>8.5<br>11.5<br><b>Q1 23</b> | -1.3<br>-2.8<br>-2.1<br>-3.6<br>-3.7<br>-3.5<br>-1.8<br>-3.8<br>-3.9<br>-3.1<br>-7.0<br>Oct-23<br>-7.2<br>-10.3 | -3.4<br>-5.8<br>-4.8<br>-1.6<br>2.4<br>-3.5<br>-2.4<br>-1.9<br>-0.8<br>-2.6<br>-1.6<br>-3.9<br><b>Sep-23</b> | -2.0<br>-2.1<br>-1.6<br>-2.5<br>-2.5<br>-3.0<br>-2.4<br>-2.7<br>-1.4<br>-8.2<br>-1.6<br>-4.7<br>Aug-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.

## Disclaimer

The general concepts shared are for educational purposes only.

The materials provided in this presentation are NOT used for the marketing or sale of any Eastspring investment products.

Readers are advised to be cautious if they intend to invest in any products that are used in the illustrations as the illustrations do not cover the full spectrum of considerations required in making an investment decision. Any investment views shared by the speaker is of his/her own and does not represent the position of Eastspring Investments Singapore or any of its affiliated companies.

This document is solely for educational information and may not be published, circulated, reproduced or distributed in whole or part to any other person.

This information is not an offer or solicitation by anyone in any jurisdiction in which such offer or solicitation is not lawful or in which the person making such offer or solicitation is not qualified to do so or to anyone to whom it is unlawful to make such an offer or solicitation. It should not be construed as an offer, solicitation of an offer, or a recommendation to transact in any securities if mentioned herein.

The information contained herein does not have any regards to the specific investment objectives, financial situation or particular needs of any person. Investors may wish to seek advice from a financial adviser before making any investment decision. In the event that investor chooses not to seek advice from a financial advisor, he should consider carefully whether the fund in question is suitable for him. Eastspring Investments (excluding JV companies) are ultimately wholly-owned / indirect subsidiaries / associates of Prudential plc of the United Kingdom.

Eastspring Investments companies (including JVs) and Prudential plc are not affiliated in any manner with Prudential Financial, Inc., a company whose principal place of business is in the United States of America or with the Prudential Assurance Company, a subsidiary of M&G plc, a company incorporated in the United Kingdom.

