## **Daily Bulletin**



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STOCKS | BONDS | INTEREST RATES | COMMODITIES | CURRENCIES

아시아 증시는 하락 마감했습니다. 중국 증시는 미국 채권 금리가 4개월 내 최고치를 기록했지만 중국의 서비스업 활동이 가속화 되고 있다는 데이터가 발표되면서 글로벌 증시 약세를 따라 하락 했습니다. 한국의 주가는 반도체 및 배터리 제조기업 주가가 하락 하고 금리 인하 지연 가능성이 커지면서 전일 미 증시 약세를 따라 하락했습니다. 일본 시장은 대형주 Fast Retailing 주도로 하락했고, 기술주들은 차입 비용 상승으로 실적이 부진했습니다. 유럽 증시는 예상보다 부진한 미국 서비스업 지표로 상승했고, 투자자들은 유로존 인플레이션 지표가 완화된 것으로 평가하며 ECB 금리 인하에 힘을 실었습니다. 은행 주가는 1.5% 상승, 2018년 이후 최고치를 기록했습니다. Forvia는 4월 18일 1분기 실적 발표를 앞두고 긍정적인 평가가나오면서 5.25% 넘게 올랐습니다. 하지만 Swiss Re 는 기업 솔루션 부문 사장인 Andreas Berger를 그룹 CEO로 임명할 예정임을 밝히며 3.75% 하락했습니다.

미국 증시는 3월 서비스업 성장세가 둔화되었다는 데이터에 따라 대체로 상승 마감했지만, 제롬 파월 연준 의장이 금리 인하가 아직 가시화되지 않았다고 밝힌 후 상승폭은 제한되었습니다. 11개 주요 S&P 500 섹터 중 7개가 통신 서비스 섹터 주도로 상승세로 마감했습니다. 그러나 Intel 은 파운드리 사업에서 70억 달러의 영업 손실을 기록했다고 밝힌 후 8% 이상 하락했는데, 이는 2023년에 보고된 52억 달러보다 더 큰 손실 규모입니다.

미 국채 금리는 제롬 파월 연준 의장이 최근 낙관적인 지표가 통화정책의 전반적인 상황을 바꾸지 않았으며 올해 금리가 여전히 하락할 것으로 예상한다고 지적하면서 수개월 내 최고치에서 하락했습니다.

국제유가는 중동 분쟁으로 인한 공급 차질에 대한 투자자들의 우려로 작년 10월 이후 최고치를 기록했지만, 미국 원유 재고 증가로 상승폭은 제한되었습니다.

M SCI La	itest 1 Da	у мір	YID	Q1 24	Q4 23	Q3 23	Mar-24	Feb-24	Jan-24
World	778 0	.1 -0.7	7.5	8.3	11.1	-3.3	3.2	4.3	0.6
United States 4	1,967 0	.1 -0.8	9.5	10.4	11.9	-3.1	3.2	5.4	1.6
Europe 2	2,107 0	.8 -0.3	5.1	5.4	11.1	-4.9	3.9	1.6	-0.1
Japan 3	3,972 -0	.6 -2.5	8.4	11.2	8.2	-1.5	3.2	3.0	4.6
Emerging Markets 1	-0,043	.6 0.0	2.5	2.4	7.9	-2.8	2.5	4.8	-4.6
Asia Pac Ex Japan	537 -0		2.1	2.1	7.9	-3.3	2.6	4.5	-4.8
Asia Ex Japan	655 -0		2.6	2.4	6.5	-3.2	2.6	5.6	-5.4
Australia	913 -0		-0.2	0.8	15.3	-3.3	3.0	-0.6	-1.6
	7,597 -1		-11.1	-11.7	3.4	-11.1	-6.5	4.6	-9.7
China H	55 -0		-1.0	-2.2	-4.2	-1.8	0.9	8.4	-10.6
	l,619 <b>-</b> 0		1.8	0.7	-4.1	-3.4	-0.1	10.0	-8.3
Korea	507 -1		-0.1	1.8	15.4	-6.6	5.3	7.4	-10.0
Taiwan	713 -0		12.1	12.5	17.5	-7.1	7.9	5.5	-1.2
Thailand	312 -0		-8.6	-8.1	3.9	-4.4	-0.9	0.7	-7.9
Malaysia	252 -0		2.6	3.0	4.6	4.5	1.0	2.4	-0.3
	3,097 -0		0.2	0.1	4.5	-0.3	3.8	0.9	-4.4
Indonesia	774 -2		-1.9	2.6	2.0	-3.3	1.1	3.2	-1.6
India		.0 1.0	7.1	6.1	12.0	2.9	0.8	2.8	2.4
Philippines	444 -1	.7 -0.9	5.4	6.4	6.5	-3.5	-0.1	5.5	1.0
			0.1	0.7	0.0	-0.0	-0.1	0.0	1.0
	itest 1 Da		YTD	Q1 24	Q4 23	Q3 23	Mar-24	Feb-24	Jan-24
Local Indices La DJA 39	ntest 1 Da	y MTD		<b>Q1 24</b> 6.1		Q3 23 -2.1			
Local Indices La DJA 39 Nasdaq 16	ntest 1 Da 0,127 -0 5,277 0	MTD .1 -1.7 .2 -0.6	<b>YTD</b> 4.3 8.6	<b>Q1 24</b> 6.1 9.3	Q4 23 13.1 13.8	Q3 23 -2.1 -3.9	Mar-24 2.2 1.8	Feb-24 2.5 6.2	<b>Jan-24</b> 1.3 1.0
Local Indices La DJA 39 Nasdaq 16 S&P 500 5	1 Da 0,127 -0 3,277 0 5,211 0	MTD .1 -1.7 .2 -0.6 .1 -0.8	4.3 8.6 9.7	<b>Q1 24</b> 6.1 9.3 10.6	Q4 23 13.1 13.8 11.7	Q3 23 -2.1 -3.9 -3.3	Mar-24 2.2 1.8 3.2	Feb-24 2.5 6.2 5.3	Jan-24 1.3 1.0 1.7
Local Indices  DJA  Nasdaq  S&P 500  Euro Stoxx 600	1 Da 0,127 -0 5,277 0 5,211 0 510 0	y MTD .1 -1.7 .2 -0.6 .1 -0.8 .3 -0.5	4.3 8.6 9.7 7.3	Q1 24 6.1 9.3 10.6 7.8	Q4 23 13.1 13.8 11.7 6.8	Q3 23 -2.1 -3.9 -3.3 -2.1	Mar-24 2.2 1.8 3.2 4.2	2.5 6.2 5.3 2.0	Jan-24 1.3 1.0 1.7 1.5
Local Indices         La           DJA         39           Nasdaq         16           S&P 500         5           Euro Stoxx 600         7           FTSE100         7	1 Da 0,127 -0 5,277 0 5,211 0 510 0 7,937 0	y MTD 1 -1.7 .2 -0.6 .1 -0.8 .3 -0.5 .0 -0.2	4.3 8.6 9.7 7.3 3.8	Q1 24 6.1 9.3 10.6 7.8 4.0	Q4 23 13.1 13.8 11.7 6.8 2.3	Q3 23 -2.1 -3.9 -3.3 -2.1 2.2	Mar-24 2.2 1.8 3.2 4.2 4.8	2.5 6.2 5.3 2.0 0.5	Jan-24  1.3  1.0  1.7  1.5  -1.3
Local Indices         La           DJA         39           Nasdaq         16           S&P 500         5           Euro Stoxx 600         7           FTSE100         7           DAX         18	1 Da 0,127 -0 0,277 0 0,211 0 5,211 0 5,10 0 7,937 0 0,368 0	y MTD 1 -1.7 2 -0.6 1 -0.8 3 -0.5 0 -0.2 5 -0.7	4.3 8.6 9.7 7.3 3.8 9.6	Q1 24 6.1 9.3 10.6 7.8 4.0 10.4	Q4 23 13.1 13.8 11.7 6.8 2.3 8.9	Q3 23 -2.1 -3.9 -3.3 -2.1 2.2 -4.7	Mar-24 2.2 1.8 3.2 4.2 4.8 4.6	Feb-24  2.5 6.2 5.3 2.0 0.5 4.6	Jan-24  1.3  1.0  1.7  1.5  -1.3  0.9
Local Indices         La           DJA         39           Nasdaq         16           S&P 500         5           Euro Stoxx 600         7           FTSE100         7           DAX         18           CAC 40         8	1 Da 0,127 -0 0,277 0 5,211 0 510 0 7,937 0 3,368 0 3,153 0	y MTD 1 -1.7 2 -0.6 1 -0.8 3 -0.5 0 -0.2 5 -0.7 3 -0.6	4.3 8.6 9.7 7.3 3.8 9.6 8.3	Q1 24 6.1 9.3 10.6 7.8 4.0 10.4 9.0	Q4 23 13.1 13.8 11.7 6.8 2.3 8.9 5.9	Q3 23 -2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4	2.2 1.8 3.2 4.2 4.8 4.6 3.6	Feb-24  2.5 6.2 5.3 2.0 0.5 4.6 3.5	Jan-24  1.3  1.0  1.7  1.5  -1.3  0.9  1.6
Local Indices         La           DJA         39           Nasdaq         16           S&P 500         5           Euro Stoxx 600         7           FTSE100         7           DAX         18           CAC 40         8           FTSE MIB         34	1 Da 0,127 -0 0,277 0 5,211 0 510 0 7,937 0 3,368 0 3,153 0 1,481 0	y MTD 1 -1.7 2 -0.6 1 -0.8 3 -0.5 0 -0.2 5 -0.7 3 -0.6 5 -0.8	4.3 8.6 9.7 7.3 3.8 9.6 8.3 14.2	Q1 24 6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1	Q4 23 13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4	Q3 23 -2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6	2.2 1.8 3.2 4.2 4.8 4.6 3.6 6.8	Feb-24  2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0	Jan-24  1.3  1.0  1.7  1.5  -1.3  0.9  1.6  1.7
Local Indices         La           DJA         39           Nasdaq         16           S&P 500         5           Euro Stoxx 600         7           FTSE100         7           DAX         18           CAC 40         8           FTSE MIB         34           Ibex 35         11	1 Da 0,127 -0 0,277 0 5,211 0 510 0 7,937 0 3,368 0 3,153 0 1,481 0 1,032 0	y MTD 1 -1.7 2 -0.6 1 -0.8 3 -0.5 0 -0.2 .5 -0.7 .3 -0.6 .5 -0.8 .5 -0.4	4.3 8.6 9.7 7.3 3.8 9.6 8.3 14.2	Q1 24 6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6	Q4 23 13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2	Q3 23 -2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6 -0.8	2.2 1.8 3.2 4.2 4.8 4.6 3.6 6.8 11.2	Feb-24  2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0 -0.7	Jan-24  1.3  1.0  1.7  1.5  -1.3  0.9  1.6  1.7  0.2
Local Indices         La           DJA         39           Nasdaq         16           S&P 500         5           Euro Stoxx 600         7           FTSE100         7           DAX         18           CAC 40         8           FTSE MIB         34           Ibex 35         11           Hang Seng         16	1 Da 0,127 -0 0,277 0 5,211 0 510 0 7,937 0 3,368 0 3,153 0 4,481 0 1,032 0 5,725 -1	y MTD  1 -1.7 2 -0.6 1 -0.8 3 -0.5 0 -0.2 5 -0.7 3 -0.6 5 -0.8 5 -0.4 2 1.2	4.3 8.6 9.7 7.3 3.8 9.6 8.3 14.2 10.2 -1.4	Q1 24 6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5	Q4 23 13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2 -3.9	Q3 23 -2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6 -0.8 -4.2	2.2 1.8 3.2 4.2 4.8 4.6 3.6 6.8 11.2 0.6	Feb-24  2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0 -0.7 6.6	Jan-24  1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2 -9.2
Local Indices         La           DJA         39           Nasdaq         16           S&P 500         5           Euro Stoxx 600         7           FTSE100         7           DAX         18           CAC 40         8           FTSE MIB         34           Ibex 35         11           Hang Seng         16           Nikkei         39	1 Day 1,127 -0,2,277 0,5,211 0,510 0,7,937 0,3,368 0,3,153 0,4,481 0,032 0,5,725 -1,0,452 -1	y MTD  1 -1.7 2 -0.6 1 -0.8 1 -0.5 0 -0.2 5 -0.7 3 -0.6 5 -0.8 5 -0.4 2 1.2 0 -2.3	4.3 8.6 9.7 7.3 3.8 9.6 8.3 14.2 10.2 -1.4 18.8	Q1 24 6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5 21.5	Q4 23 13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2 -3.9 5.2	Q3 23 -2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6 -0.8 -4.2 -3.3	Mar-24 2.2 1.8 3.2 4.2 4.8 4.6 3.6 6.8 11.2 0.6 3.8	Feb-24  2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0 -0.7 6.6 8.0	Jan-24  1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2 -9.2 8.4
Local Indices         La           DJA         39           Nasdaq         16           S&P 500         5           Euro Stoxx 600         7           FTSE100         7           DAX         18           CAC 40         8           FTSE MIB         34           Ibex 35         11           Hang Seng         16	1 Da 0,127 -0 0,277 0 5,211 0 510 0 7,937 0 3,368 0 3,153 0 4,481 0 1,032 0 5,725 -1	y MTD  1 -1.7 2 -0.6 1 -0.8 1 -0.5 0 -0.2 5 -0.7 3 -0.6 5 -0.8 5 -0.4 2 1.2 0 -2.3	4.3 8.6 9.7 7.3 3.8 9.6 8.3 14.2 10.2 -1.4	Q1 24 6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5	Q4 23 13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2 -3.9	Q3 23 -2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6 -0.8 -4.2	2.2 1.8 3.2 4.2 4.8 4.6 3.6 6.8 11.2 0.6	Feb-24  2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0 -0.7 6.6	Jan-24  1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2 -9.2
Local Indices         La           DJA         39           Nasdaq         16           S&P 500         5           Euro Stoxx 600         7           FTSE100         7           DAX         18           CAC 40         8           FTSE MIB         34           Ibex 35         11           Hang Seng         16           Nikkei         39           KOSPI	1 Day 1,127 -0,2,277 0,5,211 0,510 0,7,937 0,3,368 0,3,153 0,4,481 0,032 0,5,725 -1,0,452 -1	y MTD  1 -1.7 2 -0.6 1 -0.8 3 -0.5 0 -0.2 5 -0.7 3 -0.6 5 -0.8 5 -0.4 2 1.2 0 -2.3 8 -1.3	4.3 8.6 9.7 7.3 3.8 9.6 8.3 14.2 10.2 -1.4 18.8	Q1 24 6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5 21.5	Q4 23 13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2 -3.9 5.2	Q3 23 -2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6 -0.8 -4.2 -3.3	Mar-24 2.2 1.8 3.2 4.2 4.8 4.6 3.6 6.8 11.2 0.6 3.8	Feb-24  2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0 -0.7 6.6 8.0	Jan-24  1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2 -9.2 8.4
Local Indices	1 Day	y MTD  1 -1.7 2 -0.6 1 -0.8 3 -0.5 0 -0.2 5 -0.7 3 -0.6 5 -0.8 5 -0.4 2 1.2 0 -2.3 8 -1.3	4.3 8.6 9.7 7.3 3.8 9.6 8.3 14.2 10.2 -1.4 18.8 3.4	Q1 24 6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5 21.5 4.8	Q4 23 13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2 -3.9 5.2 8.3	Q3 23 -2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6 -0.8 -4.2 -3.3 -3.9	2.2 1.8 3.2 4.2 4.8 4.6 3.6 6.8 11.2 0.6 3.8 5.4	2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0 -0.7 6.6 8.0 5.7	Jan-24  1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2 -9.2 8.4 -6.0
Local Indices	1 Day	y MTD  1 -1.7 2 -0.6 1 -0.8 3 -0.5 0 -0.2 5 -0.7 3 -0.6 5 -0.8 5 -0.4 2 1.2 0 -2.3 8 -1.3	4.3 8.6 9.7 7.3 3.8 9.6 8.3 14.2 10.2 -1.4 18.8 3.4 YTD	Q1 24 6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5 21.5 4.8 Q1 24	Q4 23  13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2 -3.9 5.2 8.3 Q4 23	Q3 23  -2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6 -0.8 -4.2 -3.3 -3.9 Q3 23	Mar-24  2.2 1.8 3.2 4.2 4.8 4.6 3.6 6.8 11.2 0.6 3.8 5.4 Mar-24	Feb-24  2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0 -0.7 6.6 8.0 5.7  Feb-24	Jan-24  1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2 -9.2 8.4 -6.0 Jan-24
Local Indices	1 Day	y MTD .1 -1.7 .2 -0.6 .1 -0.8 .3 -0.5 .0 -0.2 .5 -0.7 .3 -0.6 .5 -0.8 .5 -0.4 .2 1.2 .2 1.2 .0 -2.3 .8 -1.3 .9 MTD .1 2.7 .5 2.9	4.3 8.6 9.7 7.3 3.8 9.6 8.3 14.2 10.2 -1.4 18.8 3.4 YTD 16.0 20.0	Q1 24 6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5 21.5 4.8 Q1 24 12.9 16.6	Q4 23  13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2 -3.9 5.2 8.3 Q4 23 -16.4	Q3 23  -2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6 -0.8 -4.2 -3.3 -3.9 Q3 23 23.1	Mar-24  2.2 1.8 3.2 4.2 4.8 4.6 3.6 6.8 11.2 0.6 3.8 5.4 Mar-24 6.1 6.2	Feb-24  2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0 -0.7 6.6 8.0 5.7 Feb-24	Jan-24  1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2 -9.2 8.4 -6.0 Jan-24 4.7 6.6
Local Indices	1 Day	y MTD .1 -1.7 .2 -0.6 .1 -0.8 .3 -0.5 .0 -0.2 .5 -0.7 .3 -0.6 .5 -0.8 .5 -0.4 .2 1.2 .2 1.2 .0 -2.3 .8 -1.3 .9 MTD .1 2.7 .5 2.9	4.3 8.6 9.7 7.3 3.8 9.6 8.3 14.2 10.2 -1.4 18.8 3.4 YTD	Q1 24 6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5 21.5 4.8 Q1 24	Q4 23  13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2 -3.9 5.2 8.3 Q4 23 -16.4 -21.4	Q3 23  -2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6 -0.8 -4.2 -3.3 -3.9 Q3 23  23.1 28.5	Mar-24  2.2 1.8 3.2 4.2 4.8 4.6 3.6 6.8 11.2 0.6 3.8 5.4 Mar-24	Feb-24  2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0 -0.7 6.6 8.0 5.7 Feb-24  1.6 3.0	Jan-24  1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2 -9.2 8.4 -6.0 Jan-24

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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