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STOCKS BONDS INTEREST RATES COMMODITIES CURRENCIES

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미국 증시는 연준 관계자들이 금리 인하 전망에 대해 신중한 접근을 하고 투자자들이 금요일 월간 고용 보고서를 기다리면서 급락세로 마감했습니다. S&P 500 주요 11개 섹터 모두 정보 기술(IT) 섹터 주도로 하락세로 장을 마감 했습니다. 그러나 의류 제조기업 Levi Strauss 주가는 최근 비용 절감 조치와 할인 축소로 인한 비용 절감을 이유로 연간 수익 전망을 상향 조정한 후 상승했습니다. 미 국채 금리는 노동시장 지표가 완만하게 개선되면서 연준이 올해 중 양적완화를 시작할 수 있다는 기대감을 뒷받침하면서 수개월 만에 최고치를 기록한 다음 날인 목요일 하락했습니다.

국제 유가는 주요 산유국들이 감산을 유지하면서 공급 감소에 대한 우려와 세계 최대 원유 소비국인 미국의 경제 성장세 강화 조짐에 따라 상승했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q1 24	Q4 23	Q3 23	Mar-24	Feb-24	Jan-24
World	773	-0.6	-1.3	6.9	8.3	11.1	-3.3	3.2	4.3	0.6
United States	4,906	-1.2	-2.0	8.2	10.4	11.9	-3.1	3.2	5.4	1.6
Europe	2,119	0.6	0.3	5.7	5.4	11.1	-4.9	3.9	1.6	-0.1
Japan	4,015	1.1	-1.4	9.6	11.2	8.2	-1.5	3.2	3.0	4.6
Emerging Markets	1,049	0.5	0.6	3.0	2.4	7.9	-2.8	2.5	4.8	-4.6
Asia Pac Ex Japan	540	0.5	0.4	2.6	2.1	7.9	-3.3	2.6	4.5	-4.8
Asia Ex Japan	657	0.3	0.4	2.9	2.4	6.5	-3.2	2.6	5.6	-5.4
Australia	926	1.4	0.4	1.2	0.8	15.3	-3.3	3.0	-0.6	-1.6
Hong Kong	7,596	0.0	0.6	-11.1	-11.7	3.4	-11.1	-6.5	4.6	-9.7
China H	55	-0.1	1.1	-1.1	-2.2	-4.2	-1.8	0.9	8.4	-10.6
China A	1,622	0.1	1.2	1.9	0.7	-4.1	-3.4	-0.1	10.0	-8.3
Korea	516	1.7	-0.1	1.7	1.8	15.4	-6.6	5.3	7.4	-10.0
Taiwan	713	Hol.	-0.4	12.1	12.5	17.5	-7.1	7.9	5.5	-1.2
Thailand	313	0.1	-0.4	-8.5	-8.1	3.9	-4.4	-0.9	0.7	-7.9
Malaysia	255	1.3	0.9	4.0	3.0	4.6	4.5	1.0	2.4	-0.3
Singapore	3,117	0.6	0.7	0.8	0.1	4.5	-0.3	3.8	0.9	-4.4
Indonesia	788	1.8	-2.7	-0.1	2.6	2.0	-3.3	1.1	3.2	-1.6
India	987	0.1	1.1	7.3	6.1	12.0	2.9	0.8	2.8	2.4
Philippines	441	-0.5	-1.5	4.9	6.4	6.5	-3.5	-0.1	5.5	1.0
Local Indices	Latest	1 Day	MTD	YTD	Q1 24	Q4 23	Q3 23	Mar-24	Feb-24	Jan-24
DJA	38,597	-1.3	-3.0	2.9	6.1	13.1	-2.1	2.2	2.5	1.3
DJA Nasdaq	38,597 16,049	-1.3 -1.4	-3.0 -2.0	2.9 7.1	6.1 9.3	13.1 13.8	-2.1 -3.9	2.2 1.8	2.5 6.2	
DJA Nasdaq S&P 500	38,597 16,049 5,147	-1.3 -1.4 -1.2	-3.0 -2.0 -2.0	2.9 7.1 8.3	6.1 9.3 10.6	13.1 13.8 11.7	-2.1 -3.9 -3.3	2.2 1.8 3.2	2.5 6.2 5.3	1.3 1.0 1.7
DJA Nasdaq S&P 500 Euro Stoxx 600	38,597 16,049 5,147 511	-1.3 -1.4 -1.2 0.2	-3.0 -2.0 -2.0 -0.3	2.9 7.1 8.3 7.4	6.1 9.3 10.6 7.8	13.1 13.8 11.7 6.8	-2.1 -3.9 -3.3 -2.1	2.2 1.8 3.2 4.2	2.5 6.2 5.3 2.0	1.3 1.0 1.7 1.5
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100	38,597 16,049 5,147 511 7,976	-1.3 -1.4 -1.2 0.2 0.5	-3.0 -2.0 -0.3 0.3	2.9 7.1 8.3 7.4 4.3	6.1 9.3 10.6 7.8 4.0	13.1 13.8 11.7 6.8 2.3	-2.1 -3.9 -3.3 -2.1 2.2	2.2 1.8 3.2 4.2 4.8	2.5 6.2 5.3 2.0 0.5	1.3 1.0 1.7 1.5 -1.3
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX	38,597 16,049 5,147 511 7,976 18,403	-1.3 -1.4 -1.2 0.2 0.5 0.2	-3.0 -2.0 -0.3 0.3 -0.5	2.9 7.1 8.3 7.4 4.3 9.9	6.1 9.3 10.6 7.8 4.0 10.4	13.1 13.8 11.7 6.8 2.3 8.9	-2.1 -3.9 -3.3 -2.1 2.2 -4.7	2.2 1.8 3.2 4.2 4.8 4.6	2.5 6.2 5.3 2.0 0.5 4.6	1.3 1.0 1.7 1.5 -1.3 0.9
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40	38,597 16,049 5,147 511 7,976 18,403 8,152	-1.3 -1.4 -1.2 0.2 0.5 0.2 0.0	-3.0 -2.0 -0.3 0.3 -0.5 -0.7	2.9 7.1 8.3 7.4 4.3 9.9 8.3	6.1 9.3 10.6 7.8 4.0 10.4 9.0	13.1 13.8 11.7 6.8 2.3 8.9 5.9	-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	2.5 6.2 5.3 2.0 0.5 4.6 3.5	1.3 1.0 1.7 1.5 -1.3 0.9 1.6
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB	38,597 16,049 5,147 511 7,976 18,403 8,152 34,455	-1.3 -1.4 -1.2 0.2 0.5 0.2 0.0 -0.1	-3.0 -2.0 -0.3 0.3 -0.5 -0.7 -0.9	2.9 7.1 8.3 7.4 4.3 9.9 8.3 14.1	6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1	13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4	-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	2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0	1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35	38,597 16,049 5,147 511 7,976 18,403 8,152 34,455 11,091	-1.3 -1.4 -1.2 0.2 0.5 0.2 0.0 -0.1 0.5	-3.0 -2.0 -0.3 0.3 -0.5 -0.7 -0.9 0.1	2.9 7.1 8.3 7.4 4.3 9.9 8.3 14.1 10.8	6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6	13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2	-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	2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0 -0.7	1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	38,597 16,049 5,147 511 7,976 18,403 8,152 34,455 11,091 16,725	-1.3 -1.4 -1.2 0.2 0.5 0.2 0.0 -0.1 0.5 Hol.	-3.0 -2.0 -0.3 0.3 -0.5 -0.7 -0.9 0.1 1.2	2.9 7.1 8.3 7.4 4.3 9.9 8.3 14.1 10.8 -1.4	6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5	13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2 -3.9	-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	2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0 -0.7 6.6	1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2 -9.2
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	38,597 16,049 5,147 511 7,976 18,403 8,152 34,455 11,091 16,725 39,773	-1.3 -1.4 -1.2 0.2 0.5 0.2 0.0 -0.1 0.5 Hol. 0.8	-3.0 -2.0 -2.0 0.3 0.3 -0.5 -0.7 -0.9 0.1 1.2 -1.5	2.9 7.1 8.3 7.4 4.3 9.9 8.3 14.1 10.8 -1.4 19.7	6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5 21.5	13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2 -3.9 5.2	-2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6 -0.8 -4.2 -3.3	2.2 1.8 3.2 4.2 4.8 4.6 3.6 6.8 11.2 0.6 3.8	2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0 -0.7 6.6 8.0	1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2 -9.2 8.4
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	38,597 16,049 5,147 511 7,976 18,403 8,152 34,455 11,091 16,725	-1.3 -1.4 -1.2 0.2 0.5 0.2 0.0 -0.1 0.5 Hol.	-3.0 -2.0 -0.3 0.3 -0.5 -0.7 -0.9 0.1 1.2	2.9 7.1 8.3 7.4 4.3 9.9 8.3 14.1 10.8 -1.4	6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5	13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2 -3.9	-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	2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0 -0.7 6.6	1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2 -9.2
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	38,597 16,049 5,147 511 7,976 18,403 8,152 34,455 11,091 16,725 39,773	-1.3 -1.4 -1.2 0.2 0.5 0.2 0.0 -0.1 0.5 Hol. 0.8	-3.0 -2.0 -2.0 0.3 0.3 -0.5 -0.7 -0.9 0.1 1.2 -1.5	2.9 7.1 8.3 7.4 4.3 9.9 8.3 14.1 10.8 -1.4 19.7	6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5 21.5	13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2 -3.9 5.2	-2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6 -0.8 -4.2 -3.3	2.2 1.8 3.2 4.2 4.8 4.6 3.6 6.8 11.2 0.6 3.8	2.5 6.2 5.3 2.0 0.5 4.6 3.5 6.0 -0.7 6.6 8.0	1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2 -9.2 8.4
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent	38,597 16,049 5,147 511 7,976 18,403 8,152 34,455 11,091 16,725 39,773 376	-1.3 -1.4 -1.2 0.2 0.5 0.2 0.0 -0.1 0.5 Hol. 0.8 1.6	-3.0 -2.0 -0.3 0.3 -0.5 -0.7 -0.9 0.1 1.2 -1.5 0.3	2.9 7.1 8.3 7.4 4.3 9.9 8.3 14.1 10.8 -1.4 19.7 5.0	6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5 21.5 4.8	13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2 -3.9 5.2 8.3	-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	1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2 -9.2 8.4 -6.0
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities	38,597 16,049 5,147 511 7,976 18,403 8,152 34,455 11,091 16,725 39,773 376 Latest	-1.3 -1.4 -1.2 0.2 0.5 0.2 0.0 -0.1 0.5 Hol. 0.8 1.6 1 Day	-3.0 -2.0 -0.3 0.3 -0.5 -0.7 -0.9 0.1 1.2 -1.5 0.3 MTD	2.9 7.1 8.3 7.4 4.3 9.9 8.3 14.1 10.8 -1.4 19.7 5.0 YTD	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	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	-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	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	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	1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7 0.2 -9.2 8.4 -6.0 Jan-24
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent	38,597 16,049 5,147 511 7,976 18,403 8,152 34,455 11,091 16,725 39,773 376 Latest 91.1	-1.3 -1.4 -1.2 0.2 0.5 0.2 0.0 -0.1 0.5 Hol. 0.8 1.6 1 Day 2.0	-3.0 -2.0 -0.3 0.3 -0.5 -0.7 -0.9 0.1 1.2 -1.5 0.3 MTD 4.7	2.9 7.1 8.3 7.4 4.3 9.9 8.3 14.1 10.8 -1.4 19.7 5.0 YTD 18.3	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	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	-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	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	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	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
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	38,597 16,049 5,147 511 7,976 18,403 8,152 34,455 11,091 16,725 39,773 376 Latest 91.1 86.9	-1.3 -1.4 -1.2 0.2 0.5 0.2 0.0 -0.1 0.5 Hol. 0.8 1.6 1 Day 2.0 1.6	-3.0 -2.0 -0.3 0.3 -0.5 -0.7 -0.9 0.1 1.2 -1.5 0.3 MTD 4.7 4.5	2.9 7.1 8.3 7.4 4.3 9.9 8.3 14.1 10.8 -1.4 19.7 5.0 YTD 18.3 21.9	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	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	-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 Q3 23 23.1 28.5	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	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	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

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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