Daily Bulletin



A Prudential plc company

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아시아 증시는 대체로 하락세 마감 했습니다. 중국 증시는 부동산 주가 하락으로 하락했고, 투자자들은 이번 주와 다음 주에 발표될 주요 경제지표를 기다리며 정책 방향을 가늠하고 있습니다. 한국의 주가는 공휴일로 인해 휴장했습니다. 일본 시장은 두 세션 연속 상승 후 투자자들이 차익실현에 나서면서 하락했고, 미국의 주요 인플레이션 수치를 앞두고 경계감이 우세 했습니다. 호주 증시는 광업 및 의료주 상승에 힘입어 상승했고 CSL은 약 1.5% 상승했습니다. 유럽 증시는 미국의 높은 인플레이션 수치에 투자자들이 유럽 중앙은행의 통화정책 결정에 초점을 맞춘 가운데 하락세로 마감했습니다. 기술주는 약 0.5% 상승한반면 유틸리티는 1.3% 이상하락했습니다. Barry Callebaut의주가는 낙관적인 반기 실적을발표하면서 코코아 가격 급등과기타 인플레이션 압력이 수요에타격을 줄 수 있다는 우려가완화되면서 11% 가까이급등했습니다. 한편 Tesco는수익이 더 늘어날 것으로 예상한 후 3% 이상 상승했습니다.

미국 증시는 투자자들이 연준이 예상보다 적은 금리 인하를 단행할 수 있다는 우려를 불러일으킨 3월 인플레이션 수치를 평가하면서 하락 마감 했습니다. S&P 500 주요 11개 업종 중 10개 업종이 부동산 부문의 손실로 인해 (-)로 마감 했습니다. 생명공학 기업인 Vertex Pharmaceuticals의 주가는 Alpine Immune Sciences를 현금 49억 달러, 주당 65달러에 인수한다고 발표한 후 1% 넘게 하락했습니다. 미국채 금리는 인플레이션 지표가 예상보다 높게 나오면서 급등했고, 연준이 6월에 금리 인하를 시작 할지 여부에 대한 의구심이 커졌습니다.

국제 유가는 이스라엘이 OPEC+ 회원국인 이란에 테헤란이 이스라엘을 공격하면 이슬람 공화국을 공격하겠다고 경고 하면서 중동의 긴장이 고조된 후 1% 이상 상승했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q1 24	Q4 23	Q3 23	Mar-24	Feb-24	Jan-24
World	773	-0.8	-1.3	6.9	8.3	11.1	-3.3	3.2	4.3	0.6
United States	4,920	-0.9	-1.7	8.5	10.4	11.9	-3.1	3.2	5.4	1.6
Europe	2,079	-0.8	-1.6	3.7	5.4	11.1	-4.9	3.9	1.6	-0.1
Japan	3,993	-1.3	-2.0	9.0	11.2	8.2	-1.5	3.2	3.0	4.6
Emerging Markets	1,058	0.3	1.5	4.0	2.4	7.9	-2.8	2.5	4.8	-4.6
Asia Pac Ex Japan	544	0.3	1.2	3.4	2.1	7.9	-3.3	2.6	4.5	-4.8
Asia Ex Japan	665	0.6	1.6	4.0	2.4	6.5	-3.2	2.6	5.6	-5.4
Australia	917	-1.2	-0.6	0.2	0.8	15.3	-3.3	3.0	-0.6	-1.6
Hong Kong	7,691	0.8	2.0	-9.9	-11.7	3.4	-11.1	-6.5	4.6	-9.7
China H	56	1.4	2.7	0.4	-2.2	-4.2	-1.8	0.9	8.4	-10.6
China A	1,592	-1.0	-0.7	0.0	0.7	-4.1	-3.4	-0.1	10.0	-8.3
Korea	504	Hol.	-2.3	-0.6	1.8	15.4	-6.6	5.3	7.4	-10.0
Taiwan	733	0.1	2.3	15.1	12.5	17.5	-7.1	7.9	5.5	-1.2
Thailand	323	0.2	3.1	-5.3	-8.1	3.9	-4.4	-0.9	0.7	-7.9
Malaysia	255	Hol.	0.8	3.8	3.0	4.6	4.5	1.0	2.4	-0.3
Singapore	3,126	-0.4	1.3	1.5	0.1	4.5	-0.3	3.8	0.9	-4.4
Indonesia	787	Hol.	-2.8	-0.2	2.6	2.0	-3.3	1.1	3.2	-1.6
India	1,001	0.8	2.6	8.9	6.1	12.0	2.9	0.8	2.8	2.4
Philippines	435	Hol.	-2.8	3.4	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
Local Indices DJIA	38,462	-1.1	-3.3	2.6	Q1 24 6.1	Q4 23 13.1	-2.1	2.2	2.5	Jan-24 1.3
DJIA Nasdaq	38,462 16,170	-1.1 -0.8	-3.3 -1.3	2.6 7.9	6.1 9.3		-2.1 -3.9	2.2 1.8	2.5 6.2	
DJIA Nasdaq S&P 500	38,462 16,170 5,161	-1.1 -0.8 -0.9	-3.3 -1.3 -1.7	2.6 7.9 8.6	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
DJIA Nasdaq S&P 500 Euro Stoxx 600	38,462 16,170 5,161 507	-1.1 -0.8 -0.9 0.2	-3.3 -1.3 -1.7 -1.1	2.6 7.9 8.6 6.6	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
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100	38,462 16,170 5,161 507 7,961	-1.1 -0.8 -0.9 0.2 0.3	-3.3 -1.3 -1.7 -1.1 0.1	2.6 7.9 8.6 6.6 4.1	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
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX	38,462 16,170 5,161 507 7,961 18,097	-1.1 -0.8 -0.9 0.2 0.3 0.1	-3.3 -1.3 -1.7 -1.1 0.1 -2.1	2.6 7.9 8.6 6.6 4.1 8.0	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
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40	38,462 16,170 5,161 507 7,961 18,097 8,045	-1.1 -0.8 -0.9 0.2 0.3 0.1	-3.3 -1.3 -1.7 -1.1 0.1 -2.1 -2.0	2.6 7.9 8.6 6.6 4.1 8.0 6.9	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
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB	38,462 16,170 5,161 507 7,961 18,097 8,045 34,040	-1.1 -0.8 -0.9 0.2 0.3 0.1 0.0	-3.3 -1.3 -1.7 -1.1 0.1 -2.1 -2.0 -2.0	2.6 7.9 8.6 6.6 4.1 8.0 6.9	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	-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
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35	38,462 16,170 5,161 507 7,961 18,097 8,045 34,040 10,775	-1.1 -0.8 -0.9 0.2 0.3 0.1 0.0 0.3 -0.4	-3.3 -1.3 -1.7 -1.1 0.1 -2.1 -2.0 -2.0 -2.3	2.6 7.9 8.6 6.6 4.1 8.0 6.9 12.8 8.1	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	1.3 1.0 1.7 1.5 -1.3 0.9 1.6 1.7
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	38,462 16,170 5,161 507 7,961 18,097 8,045 34,040 10,775 17,139	-1.1 -0.8 -0.9 0.2 0.3 0.1 0.0 0.3 -0.4	-3.3 -1.3 -1.7 -1.1 0.1 -2.1 -2.0 -2.0 -2.3 3.7	2.6 7.9 8.6 6.6 4.1 8.0 6.9 12.8 8.1 1.1	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	-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	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
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	38,462 16,170 5,161 507 7,961 18,097 8,045 34,040 10,775 17,139 39,582	-1.1 -0.8 -0.9 0.2 0.3 0.1 0.0 0.3 -0.4 1.8 -0.5	-3.3 -1.3 -1.7 -1.1 0.1 -2.1 -2.0 -2.0 -2.3 3.7 -2.0	2.6 7.9 8.6 6.6 4.1 8.0 6.9 12.8 8.1 1.1	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
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	38,462 16,170 5,161 507 7,961 18,097 8,045 34,040 10,775 17,139	-1.1 -0.8 -0.9 0.2 0.3 0.1 0.0 0.3 -0.4	-3.3 -1.3 -1.7 -1.1 0.1 -2.1 -2.0 -2.0 -2.3 3.7	2.6 7.9 8.6 6.6 4.1 8.0 6.9 12.8 8.1 1.1	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	-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	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
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	38,462 16,170 5,161 507 7,961 18,097 8,045 34,040 10,775 17,139 39,582	-1.1 -0.8 -0.9 0.2 0.3 0.1 0.0 0.3 -0.4 1.8 -0.5	-3.3 -1.3 -1.7 -1.1 0.1 -2.1 -2.0 -2.0 -2.3 3.7 -2.0	2.6 7.9 8.6 6.6 4.1 8.0 6.9 12.8 8.1 1.1	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
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI	38,462 16,170 5,161 507 7,961 18,097 8,045 34,040 10,775 17,139 39,582 370	-1.1 -0.8 -0.9 0.2 0.3 0.1 0.0 0.3 -0.4 1.8 -0.5 Hol.	-3.3 -1.3 -1.7 -1.1 0.1 -2.1 -2.0 -2.0 -2.3 3.7 -2.0 -1.2	2.6 7.9 8.6 6.6 4.1 8.0 6.9 12.8 8.1 1.1 19.2 3.5	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
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities	38,462 16,170 5,161 507 7,961 18,097 8,045 34,040 10,775 17,139 39,582 370 Latest	-1.1 -0.8 -0.9 0.2 0.3 0.1 0.0 0.3 -0.4 1.8 -0.5 Hol.	-3.3 -1.3 -1.7 -1.1 0.1 -2.1 -2.0 -2.0 -2.3 3.7 -2.0 -1.2	2.6 7.9 8.6 6.6 4.1 8.0 6.9 12.8 8.1 1.1 19.2 3.5	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	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
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent	38,462 16,170 5,161 507 7,961 18,097 8,045 34,040 10,775 17,139 39,582 370 Latest	-1.1 -0.8 -0.9 0.2 0.3 0.1 0.0 0.3 -0.4 1.8 -0.5 Hol. 1 Day	-3.3 -1.3 -1.7 -1.1 0.1 -2.1 -2.0 -2.0 -2.3 3.7 -2.0 -1.2 MTD 4.2 3.8	2.6 7.9 8.6 6.6 4.1 8.0 6.9 12.8 8.1 1.1 19.2 3.5 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 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	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
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	38,462 16,170 5,161 507 7,961 18,097 8,045 34,040 10,775 17,139 39,582 370 Latest 90.7 86.3	-1.1 -0.8 -0.9 0.2 0.3 0.1 0.0 0.3 -0.4 1.8 -0.5 Hol. 1 Day	-3.3 -1.3 -1.7 -1.1 0.1 -2.1 -2.0 -2.3 3.7 -2.0 -1.2 MTD 4.2 3.8 8.3	2.6 7.9 8.6 6.6 4.1 8.0 6.9 12.8 8.1 1.1 19.2 3.5 YTD 17.7 21.0	6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5 21.5 4.8 Q1 24 12.9 16.6 8.2	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 -15.5	-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 20.5	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	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 4.7 6.6 2.8
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	38,462 16,170 5,161 507 7,961 18,097 8,045 34,040 10,775 17,139 39,582 370 Latest 90.7 86.3 4.55	-1.1 -0.8 -0.9 0.2 0.3 0.1 0.0 0.3 -0.4 1.8 -0.5 Hol. 1 Day 1.2 4.4	-3.3 -1.3 -1.7 -1.1 0.1 -2.1 -2.0 -2.0 -2.3 3.7 -2.0 -1.2 MTD 4.2 3.8	2.6 7.9 8.6 6.6 4.1 8.0 6.9 12.8 8.1 1.1 19.2 3.5 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 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	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

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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