## **Daily Bulletin**



A Prudential plc company

17 April 2024

STOCKS | BONDS | INTEREST RATES | COMMODITIES | CURRENCIES

아시아 증시는 하락 마감했습니다. 중국 증시는 소형주를 중심으로 하락세를 보였고, 3월 경제지표는 예상보다 양호한 GDP 지표에도 불구하고 경기 회복 모멘텀이 약화되고 있음을 보여주었습니다. 한국의 주가는 미국 지표 호조로 연준의 금리 인하가 지연되고 중동 긴장 고조로 위험선호 심리 가 약화되면서 하락했습니다. 일본 시장은 기술주가 밤사이 하락세를 보였고 Advantest가 4% 넘게 떨어지며 하락했습니다. 유럽 증시는 중동 분쟁이 격화될수 있다는 우려로 하락했으며,투자자들은 고금리가 장기화될수 있다는 우려도 제기했습니다. 광업 및 은행주가 각각 2.6% 이상하락했고, 모든 섹터와 주요 증시가 하락세로 장을 마감했습니다. Wise 주가는 4분기 수익이 전년동기 대비 36% 증가한 3억 4,480만 달러를 기록했다고 발표한 후8%하락했습니다. 한편, Dr. Martens은 2025년 어두운 전망을밝힌후주가가 30% 가까이급락했습니다.

미국 증시는 국채 금리 상승과 지정학적 우려 고조로 인해 전반적으로 긍정적인 1분기 기업 실적이 상쇄되면서 혼조세를 보였습니다. S&P 500 주요 11개 섹터 중 8개가 부동산 주도로 하락 했습니다. Johnson & Johnson은 블록버스터 건선 치료제 Stelara의 매출이 기대에 미치지 못하면서 애널리스트들의 예상치를 밑돌아 2% 넘게 하락했습니다. 하지만 Morgan Stanley는 1분기 수익 추정치를 상회한 후 2.5% 이상 상승했습니다. 미 국채 금리는 글로벌 경제의 강세 조짐을 감안해 연준이 올해 금리 인하를 얼마나 빨리 단행할 지 시장이 재평가하면서 상승했습니다.

국제 유가는 경제적 어려움이 투자 심리를 압박하고 이스라엘과 이란의 이스라엘 영토 공격에 대한 대응을 주시하면서 지정학적 긴장으로 인한 상승을 억제하며 하락했습니다.

M SCI	Latest	1 Day	MTD	YTD	Q1 24	Q4 23	Q3 23	Mar-24	Feb-24	Jan-24
World	752	-0.8	-3.9	4.1	8.3	11.1	-3.3	3.2	4.3	0.6
United States	4,812	-0.2	-3.9	6.1	10.4	11.9	-3.1	3.2	5.4	1.6
Europe	2,023	-1.4	-4.1	1.1	5.4	11.1	-4.9	3.9	1.6	-0.1
Japan	3,878	-2.1	-4.8	5.8	11.2	8.2	-1.5	3.2	3.0	4.6
Emerging Markets	1,010	-2.0	-3.1	-0.7	2.4	7.9	-2.8	2.5	4.8	-4.6
Asia Pac Ex Japan	518	-2.1	-3.5	-1.4	2.1	7.9	-3.3	2.6	4.5	-4.8
Asia Ex Japan	634	-2.0	-3.1	-0.8	2.4	6.5	-3.2	2.6	5.6	-5.4
Australia	874	-2.6	-5.3	-4.5	0.8	15.3	-3.3	3.0	-0.6	-1.6
Hong Kong	7,113	-2.7	-5.7	-16.7	-11.7	3.4	-11.1	-6.5	4.6	-9.7
China H	53	-1.8	-1.5	-3.7	-2.2	-4.2	-1.8	0.9	8.4	-10.6
China A	1,592	-1.4	-0.7	0.0	0.7	-4.1	-3.4	-0.1	10.0	-8.3
Korea	473	-3.1	-8.5	-6.8	1.8	15.4	-6.6	5.3	7.4	-10.0
Taiwan	689	-3.0	-3.7	8.4	12.5	17.5	-7.1	7.9	5.5	-1.2
Thailand	318	0.0	1.4	-6.8	-8.1	3.9	-4.4	-0.9	0.7	-7.9
Malaysia	250	-0.7	-1.3	1.7	3.0	4.6	4.5	1.0	2.4	-0.3
Singapore	3,021	-0.6	-2.1	-1.9	0.1	4.5	-0.3	3.8	0.9	-4.4
Indonesia	745	-5.4	-8.0	-5.6	2.6	2.0	-3.3	1.1	3.2	-1.6
India	972	-0.6	-0.4	5.7	6.1	12.0	2.9	0.8	2.8	2.4
Philippines	410	-2.6	-8.5	-2.6	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 DJA	37,799	0.2	-5.0	0.8	<b>Q1 24</b> 6.1	13.1	-2.1	2.2	2.5	<b>Jan-24</b> 1.3
DJA Nasdaq		0.2 -0.1	-5.0 -3.1		6.1 9.3			2.2 1.8	2.5 6.2	
DJA Nasdaq S&P 500	37,799	0.2 -0.1 -0.2	-5.0 -3.1 -3.8	0.8 5.9 6.3	6.1 9.3 10.6	13.1	-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	37,799 15,865 5,051 498	0.2 -0.1 -0.2 -1.5	-5.0 -3.1 -3.8 -2.6	0.8 5.9 6.3 5.0	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	37,799 15,865 5,051 498 7,820	0.2 -0.1 -0.2 -1.5 -1.8	-5.0 -3.1 -3.8 -2.6 -1.5	0.8 5.9 6.3 5.0 2.5	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	37,799 15,865 5,051 498 7,820 17,766	0.2 -0.1 -0.2 -1.5 -1.8	-5.0 -3.1 -3.8 -2.6 -1.5	0.8 5.9 6.3 5.0 2.5 6.1	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
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40	37,799 15,865 5,051 498 7,820 17,766 7,933	0.2 -0.1 -0.2 -1.5 -1.8 -1.4 -1.3	-5.0 -3.1 -3.8 -2.6 -1.5 -3.9 -3.3	0.8 5.9 6.3 5.0 2.5 6.1 5.5	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	37,799 15,865 5,051 498 7,820 17,766 7,933 33,394	0.2 -0.1 -0.2 -1.5 -1.8 -1.4 -1.3	-5.0 -3.1 -3.8 -2.6 -1.5 -3.9 -3.3 -3.9	0.8 5.9 6.3 5.0 2.5 6.1 5.5	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
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35	37,799 15,865 5,051 498 7,820 17,766 7,933 33,394 10,527	0.2 -0.1 -0.2 -1.5 -1.8 -1.4 -1.3 -1.7	-5.0 -3.1 -3.8 -2.6 -1.5 -3.9 -3.3 -3.9 -4.5	0.8 5.9 6.3 5.0 2.5 6.1 5.5 10.6 5.6	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
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	37,799 15,865 5,051 498 7,820 17,766 7,933 33,394 10,527 16,249	0.2 -0.1 -0.2 -1.5 -1.8 -1.4 -1.3 -1.7 -1.5	-5.0 -3.1 -3.8 -2.6 -1.5 -3.9 -3.3 -3.9 -4.5 -1.7	0.8 5.9 6.3 5.0 2.5 6.1 5.5 10.6 5.6	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
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	37,799 15,865 5,051 498 7,820 17,766 7,933 33,394 10,527 16,249 38,471	0.2 -0.1 -0.2 -1.5 -1.8 -1.4 -1.3 -1.7 -1.5 -2.1	-5.0 -3.1 -3.8 -2.6 -1.5 -3.9 -3.3 -3.9 -4.5 -1.7 -4.7	0.8 5.9 6.3 5.0 2.5 6.1 5.5 10.6 5.6 -4.2	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
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	37,799 15,865 5,051 498 7,820 17,766 7,933 33,394 10,527 16,249	0.2 -0.1 -0.2 -1.5 -1.8 -1.4 -1.3 -1.7 -1.5	-5.0 -3.1 -3.8 -2.6 -1.5 -3.9 -3.3 -3.9 -4.5 -1.7	0.8 5.9 6.3 5.0 2.5 6.1 5.5 10.6 5.6	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
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	37,799 15,865 5,051 498 7,820 17,766 7,933 33,394 10,527 16,249 38,471	0.2 -0.1 -0.2 -1.5 -1.8 -1.4 -1.3 -1.7 -1.5 -2.1	-5.0 -3.1 -3.8 -2.6 -1.5 -3.9 -3.3 -3.9 -4.5 -1.7 -4.7	0.8 5.9 6.3 5.0 2.5 6.1 5.5 10.6 5.6 -4.2	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
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI	37,799 15,865 5,051 498 7,820 17,766 7,933 33,394 10,527 16,249 38,471 357	0.2 -0.1 -0.2 -1.5 -1.8 -1.4 -1.3 -1.7 -1.5 -2.1 -1.9	-5.0 -3.1 -3.8 -2.6 -1.5 -3.9 -3.3 -3.9 -4.5 -1.7 -4.7 -4.8	0.8 5.9 6.3 5.0 2.5 6.1 5.5 10.6 5.6 -4.2 15.8 -0.3	6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5 21.5 4.8	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	37,799 15,865 5,051 498 7,820 17,766 7,933 33,394 10,527 16,249 38,471 357 Latest	0.2 -0.1 -0.2 -1.5 -1.8 -1.4 -1.3 -1.7 -1.5 -2.1 -1.9 -2.3	-5.0 -3.1 -3.8 -2.6 -1.5 -3.9 -3.3 -3.9 -4.5 -1.7 -4.7 -4.8	0.8 5.9 6.3 5.0 2.5 6.1 5.5 10.6 5.6 -4.2 15.8 -0.3	6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5 21.5 4.8 <b>Q1 24</b>	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 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
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent	37,799 15,865 5,051 498 7,820 17,766 7,933 33,394 10,527 16,249 38,471 357 Latest	0.2 -0.1 -0.2 -1.5 -1.8 -1.4 -1.3 -1.7 -1.5 -2.1 -1.9 -2.3 1 Day	-5.0 -3.1 -3.8 -2.6 -1.5 -3.9 -3.3 -3.9 -4.5 -1.7 -4.7 -4.8 MTD	0.8 5.9 6.3 5.0 2.5 6.1 5.5 10.6 5.6 -4.2 15.8 -0.3 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 <b>Q1 24</b>	13.1 13.8 11.7 6.8 2.3 8.9 5.9 8.4 8.2 -3.9 5.2 8.3 <b>Q4 23</b>	-2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6 -0.8 -4.2 -3.3 -3.9 <b>Q3 23</b>	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 WTI	37,799 15,865 5,051 498 7,820 17,766 7,933 33,394 10,527 16,249 38,471 357 Latest 90.1 85.3	0.2 -0.1 -0.2 -1.5 -1.8 -1.4 -1.3 -1.7 -1.5 -2.1 -1.9 -2.3 1 Day -0.4 -0.8	-5.0 -3.1 -3.8 -2.6 -1.5 -3.9 -3.3 -3.9 -4.5 -1.7 -4.7 -4.8 MTD 3.6 2.5 11.2	0.8 5.9 6.3 5.0 2.5 6.1 5.5 10.6 5.6 -4.2 15.8 -0.3 YTD 16.9 19.6 20.4	6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5 21.5 4.8 <b>Q1 24</b> 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 <b>Q4 23</b> -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 <b>Q3 23</b> 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
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	37,799 15,865 5,051 498 7,820 17,766 7,933 33,394 10,527 16,249 38,471 357 Latest 90.1 85.3 4.67	0.2 -0.1 -0.2 -1.5 -1.8 -1.4 -1.3 -1.7 -1.5 -2.1 -1.9 -2.3 <b>1 Day</b> -0.4 -0.8 0.9	-5.0 -3.1 -3.8 -2.6 -1.5 -3.9 -3.3 -3.9 -4.5 -1.7 -4.7 -4.8 MTD 3.6 2.5	0.8 5.9 6.3 5.0 2.5 6.1 5.5 10.6 5.6 -4.2 15.8 -0.3 <b>YTD</b>	6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5 21.5 4.8 <b>Q1 24</b> 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 <b>Q4 23</b>	-2.1 -3.9 -3.3 -2.1 2.2 -4.7 -3.4 0.6 -0.8 -4.2 -3.3 -3.9 <b>Q3 23</b> 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	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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