## **Daily Bulletin**



A Prudential plc company

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아시아 증시는 상승 마감했습니다. 중국 증시는 투자자들이 미국 금리 전망을 긍정적으로 평가 하면서 은행주 주도로 상승했고 Shenzhou International Group 은 5% 올랐습니다. 한국의 주가는 중동의 지정학적 리스크가 지속 되고 미국의 금리 인하가 지연될 것이라는 추측 속 투자자들이 저가매수에 나서며 급등했습니다. 일본 시장은 운송장비, 제약, 해상운송 섹터의 랠리로 주가가 오르며 상승했습니다. 유럽 증시는 유럽중앙은행의 첫 금리 인하에 대한 추측이 이어 지면서 소폭 상승 마감했습니다. 유가 급락으로 원유 및 가스주가 1.5% 하락한 반면 은행 업종이 1.5% 넘게 오르며 상승세를 주도했습니다. ABB는 예상을 뛰어넘는 영업이익 증가를 발표한 후 5.5% 이상 상승했습니다. 그러나 핀란드 기업 Nokia의 주가는 영업이익이 시장 기대치를 하회하며 19% 급락했습니다.

미국 증시는 투자자들이 최근 기업 실적을 살피는 가운데 경제 지표와 연준 관계자의 발언으로 중앙은행이 금리를 근시일 내 인하할 것 같지 않다는 전망이나오면서 보합세로 마감했습니다. S&P 500 주요 11개 업종 중 7개가 필수 소비재 섹터 주도로 상승했습니다. 자동차 부품 유통기업 Genuine Parts는 2024년 수익 전망을 상향 조정한 후 11% 넘게 급등했습니다. 하지만 Equifax는 예상치를 하회하는 2분기 수익을 전망하며 8.5% 하락했습니다.

미 국채 금리는 투자자들이 안정적인 노동시장 지표와 인플레이션 하락세가 주춤할 수 있다는 연준 관계자의 경고에 무게를 두면서 11월 이후 최고치 를 기록했습니다.

국제 유가는 투자자들이 미국 경제지표 혼조, 베네수엘라와 이란에 대한 미국의 제재, 중동의 긴장 완화 등을 고려하면서 3주 내 최저치로 떨어졌습니다.

MSCI	Latest	1 Day	MTD	YTD	Q1 24	Q4 23	Q3 23	Mar-24	Feb-24	Jan-24
World	749	0.0	-4.3	3.7	8.3	11.1	-3.3	3.2	4.3	0.6
United States	4,772	-0.2	-4.7	5.3	10.4	11.9	-3.1	3.2	5.4	1.6
Europe	2,033	0.4	-3.6	1.6	5.4	11.1	-4.9	3.9	1.6	-0.1
Japan	3,842	0.4	-5.7	4.9	11.2	8.2	-1.5	3.2	3.0	4.6
<b>Emerging Markets</b>	1,019	0.6	-2.3	0.1	2.4	7.9	-2.8	2.5	4.8	-4.6
Asia Pac Ex Japan	523	0.7	-2.5	-0.4	2.1	7.9	-3.3	2.6	4.5	-4.8
Asia Ex Japan	640	0.7	-2.1	0.3	2.4	6.5	-3.2	2.6	5.6	-5.4
Australia	880	0.7	-4.6	-3.8	0.8	15.3	-3.3	3.0	-0.6	-1.6
Hong Kong	7,165	0.7	-5.0	-16.1	-11.7	3.4	-11.1	-6.5	4.6	-9.7
China H	54	0.7	-0.4	-2.6	-2.2	-4.2	-1.8	0.9	8.4	-10.6
China A	1,623	0.1	1.3	2.0	0.7	-4.1	-3.4	-0.1	10.0	-8.3
Korea	482	2.7	-6.6	-4.9	1.8	15.4	-6.6	5.3	7.4	-10.0
Taiwan	705	0.7	-1.5	10.8	12.5	17.5	-7.1	7.9	5.5	-1.2
Thailand	309	-0.4	-1.3	-9.3	-8.1	3.9	-4.4	-0.9	0.7	-7.9
Malaysia	252	0.6	-0.4	2.6	3.0	4.6	4.5	1.0	2.4	-0.3
Singapore	3,069	1.3	-0.5	-0.4	0.1	4.5	-0.3	3.8	0.9	-4.4
Indonesia	748	1.0	-7.6	-5.2	2.6	2.0	-3.3	1.1	3.2	-1.6
India	967	-0.5	-0.9	5.2	6.1	12.0	2.9	0.8	2.8	2.4
Dhilinnings	416	1.2	-7.1	-1.1	6.4	6.5	-3.5	-0.1	5.5	1.0
Philippines	710	1.4	7 + 1	111	0. 1	0.5			5.5	
Local Indices	Latest	1 Day	MTD	YTD	Q1 24	Q4 23	Q3 23	Mar-24	Feb-24	Jan-24
			<b>MTD</b> -5.0		<b>Q1 24</b> 6.1		<b>Q3 23</b> -2.1	Mar- <b>24</b> 2.2	<b>Feb-24</b> 2.5	
Local Indices	<b>Latest</b> 37,775 15,602	1 Day	MTD	YTD	Q1 24	Q4 23	Q3 23	Mar-24	Feb-24	Jan-24
Local Indices DJIA Nasdaq S&P 500	Latest 37,775 15,602 5,011	0.1 -0.5 -0.2	-5.0 -4.7 -4.6	97TD 0.8 4.1 5.5	<b>Q1 24</b> 6.1 9.3 10.6	<b>Q4 23</b> 13.1 13.8 11.7	Q3 23 -2.1 -3.9 -3.3	Mar-24 2.2 1.8 3.2	<b>Feb-24</b> 2.5 6.2 5.3	Jan-24 1.3 1.0 1.7
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600	37,775 15,602 5,011 500	<b>1 Day</b> 0.1 -0.5	-5.0 -4.7 -4.6 -2.3	<b>YTD</b> 0.8 4.1	<b>Q1 24</b> 6.1 9.3	<b>Q4 23</b> 13.1 13.8	<b>Q3 23</b> -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 DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100	37,775 15,602 5,011 500 7,877	0.1 -0.5 -0.2 0.3 0.4	-5.0 -4.7 -4.6 -2.3 -0.7	97TD 0.8 4.1 5.5 5.3 3.3	Q1 24 6.1 9.3 10.6 7.8 4.0	Q4 23 13.1 13.8 11.7 6.8 2.3	-2.1 -3.9 -3.3 -2.1 2.2	Mar-24  2.2  1.8  3.2  4.2  4.8	Feb-24  2.5 6.2 5.3 2.0 0.5	Jan-24 1.3 1.0 1.7 1.5 -1.3
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX	Latest 37,775 15,602 5,011 500 7,877 17,837	0.1 -0.5 -0.2 0.3 0.4 0.4	-5.0 -4.7 -4.6 -2.3 -0.7 -3.5	97TD  0.8  4.1  5.5  5.3  3.3  6.5	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	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
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40	Latest 37,775 15,602 5,011 500 7,877 17,837 8,023	0.1 -0.5 -0.2 0.3 0.4 0.4 0.5	-5.0 -4.7 -4.6 -2.3 -0.7 -3.5 -2.2	97TD  0.8  4.1  5.5  5.3  3.3  6.5  6.7	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	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  DJIA  Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB	Latest 37,775 15,602 5,011 500 7,877 17,837 8,023 33,882	1 Day 0.1 -0.5 -0.2 0.3 0.4 0.4 0.5 0.7	-5.0 -4.7 -4.6 -2.3 -0.7 -3.5 -2.2 -2.5	0.8 4.1 5.5 5.3 3.3 6.5 6.7 12.2	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  DJIA  Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35	Latest 37,775 15,602 5,011 500 7,877 17,837 8,023 33,882 10,765	1 Day 0.1 -0.5 -0.2 0.3 0.4 0.4 0.5 0.7 1.2	-5.0 -4.7 -4.6 -2.3 -0.7 -3.5 -2.2 -2.5 -2.3	0.8 4.1 5.5 5.3 3.3 6.5 6.7 12.2 8.0	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 DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	Latest  37,775  15,602  5,011  500  7,877  17,837  8,023  33,882  10,765  16,386	0.1 -0.5 -0.2 0.3 0.4 0.4 0.5 0.7 1.2	-5.0 -4.7 -4.6 -2.3 -0.7 -3.5 -2.2 -2.5 -2.3 -0.9	97TD  0.8  4.1  5.5  5.3  3.3  6.5  6.7  12.2  8.0  -3.4	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	Mar-24  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  DJIA  Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	Latest 37,775 15,602 5,011 500 7,877 17,837 8,023 33,882 10,765 16,386 38,080	1 Day 0.1 -0.5 -0.2 0.3 0.4 0.4 0.5 0.7 1.2 0.8 0.3	-5.0 -4.7 -4.6 -2.3 -0.7 -3.5 -2.2 -2.5 -2.3 -0.9 -5.7	0.8 4.1 5.5 5.3 3.3 6.5 6.7 12.2 8.0 -3.4 14.6	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 DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	Latest  37,775  15,602  5,011  500  7,877  17,837  8,023  33,882  10,765  16,386	0.1 -0.5 -0.2 0.3 0.4 0.4 0.5 0.7 1.2	-5.0 -4.7 -4.6 -2.3 -0.7 -3.5 -2.2 -2.5 -2.3 -0.9	97TD  0.8  4.1  5.5  5.3  3.3  6.5  6.7  12.2  8.0  -3.4	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	Mar-24  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  DJIA  Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	Latest 37,775 15,602 5,011 500 7,877 17,837 8,023 33,882 10,765 16,386 38,080	1 Day 0.1 -0.5 -0.2 0.3 0.4 0.4 0.5 0.7 1.2 0.8 0.3	-5.0 -4.7 -4.6 -2.3 -0.7 -3.5 -2.2 -2.5 -2.3 -0.9 -5.7	0.8 4.1 5.5 5.3 3.3 6.5 6.7 12.2 8.0 -3.4 14.6	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  DJIA  Nasdaq S&P 500  Euro Stoxx 600  FTSE100  DAX  CAC 40  FTSE MIB  Ibex 35  Hang Seng  Nikkei  KOSPI	Latest  37,775  15,602  5,011  500  7,877  17,837  8,023  33,882  10,765  16,386  38,080  359	1 Day  0.1 -0.5 -0.2 0.3 0.4 0.4 0.5 0.7 1.2 0.8 0.3 1.8	-5.0 -4.7 -4.6 -2.3 -0.7 -3.5 -2.2 -2.5 -2.3 -0.9 -5.7 -4.2	0.8 4.1 5.5 5.3 3.3 6.5 6.7 12.2 8.0 -3.4 14.6 0.4	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	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	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	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  DJIA  Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities	Latest  37,775  15,602  5,011  500  7,877  17,837  8,023  33,882  10,765  16,386  38,080  359  Latest	1 Day 0.1 -0.5 -0.2 0.3 0.4 0.4 0.5 0.7 1.2 0.8 0.3 1.8 1 Day	-5.0 -4.7 -4.6 -2.3 -0.7 -3.5 -2.2 -2.5 -2.3 -0.9 -5.7 -4.2	97D 0.8 4.1 5.5 5.3 3.3 6.5 6.7 12.2 8.0 -3.4 14.6 0.4 97D	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  DJIA  Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent	Latest 37,775 15,602 5,011 500 7,877 17,837 8,023 33,882 10,765 16,386 38,080 359 Latest 86.9	1 Day  0.1 -0.5 -0.2 0.3 0.4 0.4 0.5 0.7 1.2 0.8 0.3 1.8 1 Day -0.6	-5.0 -4.7 -4.6 -2.3 -0.7 -3.5 -2.2 -2.5 -2.3 -0.9 -5.7 -4.2 MTD -0.1	97D 0.8 4.1 5.5 5.3 3.3 6.5 6.7 12.2 8.0 -3.4 14.6 0.4 97D 12.8 15.9	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 -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 6.1	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 4.7 6.6
Local Indices  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	Latest  37,775  15,602  5,011  500  7,877  17,837  8,023  33,882  10,765  16,386  38,080  359  Latest  86.9  82.6	1 Day  0.1 -0.5 -0.2 0.3 0.4 0.4 0.5 0.7 1.2 0.8 0.3 1.8 1 Day -0.6 -0.2	-5.0 -4.7 -4.6 -2.3 -0.7 -3.5 -2.2 -2.5 -2.3 -0.9 -5.7 -4.2 MTD	97TD  0.8  4.1  5.5  5.3  3.3  6.5  6.7  12.2  8.0  -3.4  14.6  0.4  97TD  12.8	Q1 24 6.1 9.3 10.6 7.8 4.0 10.4 9.0 15.1 10.6 -2.5 21.5 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	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	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

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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