## **Daily Bulletin**



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## STOCKS BONDS INTEREST RATES COMMODITIES CURRENCIES

아시아 증시는 상승 마감했습니다. 중국 증시는 미국 기업들의 실적 호조와 4월 미국 기업 활동 둔화 데이터에 따른 금리 인하 완화로 시장 심리가 개선되면서 반등하며 글로벌 증시 상승을 견인했습니다. 한국의 주가는 반도체 및 배터리 제조기업들이 수요 기대감에 힘입어 상승했고, LG에너지솔루션 은 4% 넘게 올랐습니다. 일본 시장 은 투자자들이 기술 관련주를 계속 사들이면서 상승했고 Tokyo Electron 주가는 7% 넘게 상승 했습니다.

유럽 증시는 Handelsbanken의 실망스러운 실적 발표로 금융주가 하락한 반면, ASM International 의 호조 전망으로 기술주가 손실 폭을 제한하면서 하락했습니다. 금융주는 2% 가까이 하락한 반면 기술주는 1.3% 상승했습니다. UBS는 은행 경영진이 스위스 정부의 자본 요건 강화 계획에 대한 주요 우려를 표명한 후 3% 넘게 하락했습니다. 하지만 ASM International은 2분기 매출 전망 을 상향 조정하면서 11% 이상 상승했습니다. 미국 증시는 투자자들이 특히 기술 대기업의 긍정적인 실적에 따른 국채 금리 상승에 무게를 두면서 혼조세를 보였습니다. S&P 500 주요 11개 섹터 중 7개가 필수소비재 주도로 상승세로 마감했습니다. Tesla는 생산량을 늘리고 더 저렴한 모델을 출시 하겠다는 계획이 분기 실적 부진 을 덮으면서 12% 급등했습니다. 그러나 Meta Platforms은 2024 년에 자본 지출이 최대 400억 달러에 달할 수 있다고 보고하며 11% 가까이 급락했습니다. 미국채 금리는 시장 참가자들이 연준 정책에 대한 추가 단서를 줄 주요 경제지표 발표를 기다리며 상승했고 국채 5년 물 발행에 대한 수요도 견조했습니다.

국제 유가는 중동 분쟁에 대한 우려가 완화되고 미국 내 기업 활동이 둔화되면서 하락했지만 미국 원유 재고가 감소하면서 하락폭은 제한되었습니다.

MSCI	Latest	1 Day	MTD	YTD	Q1 24	Q4 23	Q3 23	Mar-24	Feb-24	Jan-24
World	759	0.2	-2.9	5.1	8.3	11.1	-3.3	3.2	4.3	0.6
United States	4,831	0.0	-3.5	6.6	10.4	11.9	-3.1	3.2	5.4	1.6
Europe	2,064	-0.5	-1.9	3.4	5.4	11.1	-4.9	3.9	1.6	-0.1
Japan	3,887	1.8	-4.6	6.1	11.2	8.2	-1.5	3.2	3.0	4.6
<b>Emerging Markets</b>	1,035	1.5	-0.7	1.7	2.4	7.9	-2.8	2.5	4.8	-4.6
Asia Pac Ex Japan	534	1.7	-0.5	1.6	2.1	7.9	-3.3	2.6	4.5	-4.8
Asia Ex Japan	654	2.0	0.0	2.4	2.4	6.5	-3.2	2.6	5.6	-5.4
Australia	894	0.3	-3.1	-2.3	0.8	15.3	-3.3	3.0	-0.6	-1.6
Hong Kong	7,522	2.1	-0.3	-11.9	-11.7	3.4	-11.1	-6.5	4.6	-9.7
China H	56	2.1	4.2	2.0	-2.2	-4.2	-1.8	0.9	8.4	-10.6
China A	1,597	0.4	-0.3	0.4	0.7	-4.1	-3.4	-0.1	10.0	-8.3
Korea	490	3.1	-5.2	-3.5	1.8	15.4	-6.6	5.3	7.4	-10.0
Taiwan	693	3.5	-3.2	8.9	12.5	17.5	-7.1	7.9	5.5	-1.2
Thailand	307	0.5	-1.6	-9.6	-8.1	3.9	-4.4	-0.9	0.7	-7.9
Malaysia	256	0.7	1.3	4.4	3.0	4.6	4.5	1.0	2.4	-0.3
Singapore	3,199	0.6	3.7	3.9	0.1	4.5	-0.3	3.8	0.9	-4.4
Indonesia	750	1.1	-7.4	-4.9	2.6	2.0	-3.3	1.1	3.2	-1.6
India	988	0.3	1.2	7.4	6.1	12.0	2.9	0.8	2.8	2.4
Philippines	416	1.0	-7.0	-1.1	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	38,461	-0.1	-3.3	2.6	6.1	13.1	-2.1	2.2	2.5	1.3
DJA Nasdaq	38,461 15,713	-0.1 0.1	-3.3 -4.1	2.6 4.9	6.1 9.3	13.1 13.8	-2.1 -3.9	2.2 1.8	2.5 6.2	1.3 1.0
DJA Nasdaq S&P 500	38,461 15,713 5,072	-0.1 0.1 0.0	-3.3 -4.1 -3.4	2.6 4.9 6.8	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	38,461 15,713 5,072 506	-0.1 0.1 0.0 -0.4	-3.3 -4.1 -3.4 -0.9	2.6 4.9 6.8 6.8	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	38,461 15,713 5,072 506 8,040	-0.1 0.1 0.0 -0.4 -0.1	-3.3 -4.1 -3.4 -0.9 1.4	2.6 4.9 6.8 6.8 5.4	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	38,461 15,713 5,072 506 8,040 18,089	-0.1 0.1 0.0 -0.4 -0.1 -0.3	-3.3 -4.1 -3.4 -0.9 1.4 -2.2	2.6 4.9 6.8 6.8 5.4 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 -1.3 0.9
DJA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40	38,461 15,713 5,072 506 8,040 18,089 8,092	-0.1 0.1 0.0 -0.4 -0.1 -0.3 -0.2	-3.3 -4.1 -3.4 -0.9 1.4 -2.2 -0.9	2.6 4.9 6.8 6.8 5.4 8.0 8.0	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	38,461 15,713 5,072 506 8,040 18,089 8,092 34,271	-0.1 0.1 0.0 -0.4 -0.1 -0.3 -0.2 -0.3	-3.3 -4.1 -3.4 -0.9 1.4 -2.2 -0.9 0.2	2.6 4.9 6.8 6.8 5.4 8.0 8.0 15.3	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	38,461 15,713 5,072 506 8,040 18,089 8,092 34,271 11,028	-0.1 0.1 0.0 -0.4 -0.1 -0.3 -0.2 -0.3 -0.4	-3.3 -4.1 -3.4 -0.9 1.4 -2.2 -0.9 0.2 0.0	2.6 4.9 6.8 5.4 8.0 8.0 15.3 10.7	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	38,461 15,713 5,072 506 8,040 18,089 8,092 34,271 11,028 17,201	-0.1 0.1 0.0 -0.4 -0.1 -0.3 -0.2 -0.3 -0.4 2.2	-3.3 -4.1 -3.4 -0.9 1.4 -2.2 -0.9 0.2 0.0 4.0	2.6 4.9 6.8 6.8 5.4 8.0 8.0 15.3 10.7 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	38,461 15,713 5,072 506 8,040 18,089 8,092 34,271 11,028 17,201 38,460	-0.1 0.1 0.0 -0.4 -0.1 -0.3 -0.2 -0.3 -0.4 2.2 2.4	-3.3 -4.1 -3.4 -0.9 1.4 -2.2 -0.9 0.2 0.0 4.0 -4.7	2.6 4.9 6.8 5.4 8.0 8.0 15.3 10.7 1.4 15.8	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	38,461 15,713 5,072 506 8,040 18,089 8,092 34,271 11,028 17,201	-0.1 0.1 0.0 -0.4 -0.1 -0.3 -0.2 -0.3 -0.4 2.2	-3.3 -4.1 -3.4 -0.9 1.4 -2.2 -0.9 0.2 0.0 4.0	2.6 4.9 6.8 6.8 5.4 8.0 8.0 15.3 10.7 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 KOSPI Bonds and Commodities	38,461 15,713 5,072 506 8,040 18,089 8,092 34,271 11,028 17,201 38,460 363 Latest	-0.1 0.1 0.0 -0.4 -0.1 -0.3 -0.2 -0.3 -0.4 2.2 2.4	-3.3 -4.1 -3.4 -0.9 1.4 -2.2 -0.9 0.2 0.0 4.0 -4.7 -3.1 MTD	2.6 4.9 6.8 6.8 5.4 8.0 15.3 10.7 1.4 15.8 1.5 <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	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 -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	38,461 15,713 5,072 506 8,040 18,089 8,092 34,271 11,028 17,201 38,460 363 Latest 88.1	-0.1 0.1 0.0 -0.4 -0.1 -0.3 -0.2 -0.3 -0.4 2.2 2.4 1.9 <b>1 Day</b> -0.4	-3.3 -4.1 -3.4 -0.9 1.4 -2.2 -0.9 0.2 0.0 4.0 -4.7 -3.1 MTD 1.3	2.6 4.9 6.8 6.8 5.4 8.0 15.3 10.7 1.4 15.8 1.5 <b>YTD</b> 14.3	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> 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 <b>Q4 23</b> -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 <b>Feb-24</b> 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	38,461 15,713 5,072 506 8,040 18,089 8,092 34,271 11,028 17,201 38,460 363 Latest	-0.1 0.1 0.0 -0.4 -0.1 -0.3 -0.2 -0.3 -0.4 2.2 2.4 1.9 <b>1</b> Day	-3.3 -4.1 -3.4 -0.9 1.4 -2.2 -0.9 0.2 0.0 4.0 -4.7 -3.1 MTD	2.6 4.9 6.8 6.8 5.4 8.0 15.3 10.7 1.4 15.8 1.5 <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>	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 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 <b>Feb-24</b>	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	38,461 15,713 5,072 506 8,040 18,089 8,092 34,271 11,028 17,201 38,460 363 Latest 88.1	-0.1 0.1 0.0 -0.4 -0.1 -0.3 -0.2 -0.3 -0.4 2.2 2.4 1.9 <b>1 Day</b> -0.4	-3.3 -4.1 -3.4 -0.9 1.4 -2.2 -0.9 0.2 0.0 4.0 -4.7 -3.1 MTD 1.3	2.6 4.9 6.8 6.8 5.4 8.0 15.3 10.7 1.4 15.8 1.5 <b>YTD</b> 14.3	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> 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 <b>Q4 23</b> -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 <b>Feb-24</b> 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	38,461 15,713 5,072 506 8,040 18,089 8,092 34,271 11,028 17,201 38,460 363 Latest 88.1 82.8	-0.1 0.1 0.0 -0.4 -0.1 -0.3 -0.2 -0.3 -0.4 2.2 2.4 1.9 <b>1 Day</b> -0.4 -0.7	-3.3 -4.1 -3.4 -0.9 1.4 -2.2 -0.9 0.2 0.0 4.0 -4.7 -3.1 <b>MTD</b> 1.3 -0.5	2.6 4.9 6.8 5.4 8.0 15.3 10.7 1.4 15.8 1.5 <b>YTD</b> 14.3 16.1	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> -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 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 <b>Mar-24</b> 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 <b>Feb-24</b> 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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