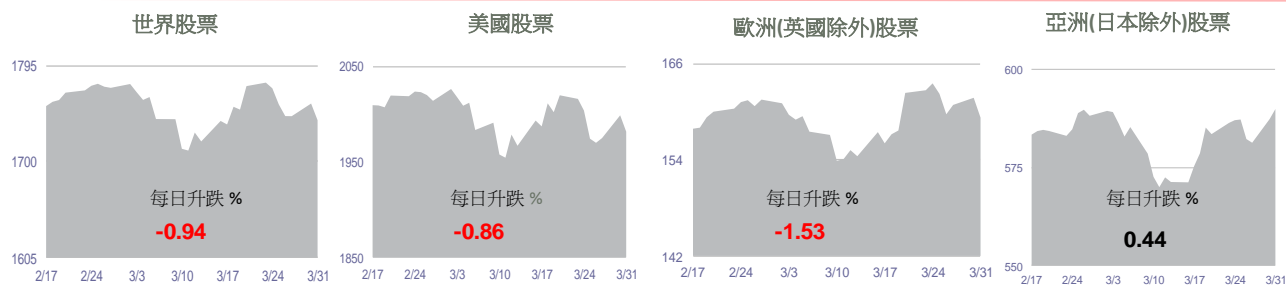


# Daily Bulletin

April 1, 2015

- ▶ 儘管隔夜華爾街股市凌厲攀升，但亞洲股市周二走勢個別發展。市場早段的升幅化為烏有，擔憂希臘政府能否於4月20日耗盡現金前獲得貸款援助。
- ▶ 備受獲利回吐影響，加上列治文聯邦儲備銀行總裁拉克爾Jeffrey Lacker發表評論，重燃市場對利率前景的憂慮，拖累美國股市全面下跌。拉克爾在列治文總商會Greater Richmond Chamber of Commerce發表講話時表示，有充分的理由相信相對的短期內當局將會加息。
- ▶ 歐洲股市周繼上日市況凌厲攀升後，周二走勢全面下跌。希臘局勢令人憂慮，加上歐元區失業率數據欠佳，遏抑市場投資氣氛。失業率維持高企，而且超出市場預期。此外，希臘政府與國際債權人就改革方案未能達成協議。根據媒體報導，在布魯塞爾舉行的雙方會談已經結束，但雙方未能達成共識。



資料來源: 由彭博資訊提供以美元計算摩根士丹利指數回報率

數據截至

March 31, 2015

美國	收盤	漲跌%	年初至今%
道瓊斯工業平均	17,776.12	-1.11	-0.26
納斯達克綜合	4,900.89	-0.94	3.48
標準普爾500	2,067.89	-0.88	0.44
標準普爾500波幅 (VIX)	15.29	5.38	-20.36
MSCI 美國指數	1,981.62	-0.86	0.86

歐洲	收盤	漲跌%	年初至今%
道瓊歐洲 50	3,697.38	-0.82	17.51
富時 100 (倫敦)	6,773.04	-1.72	3.15
法蘭克福 DAX (法蘭克福)	11,966.17	-0.99	22.03
巴黎 CAC-40 (巴黎)	5,033.64	-0.98	17.81
富時意大利 MIB (意大利)	23,157.12	-0.44	21.80
西班牙 Ibex 35 (西班牙)	11,521.10	-0.07	12.08
MSCI 歐洲(英國除外)股票	159.26	-1.53	18.44

亞洲	收盤	漲跌%	年初至今%
悉尼普通股指數 S&P/ASX (澳洲)	5,891.51	0.78	8.42
新西蘭 50 (新西蘭)	5,833.99	0.22	4.78
恆生 (香港)	24,900.89	0.18	5.49
雅加達綜合 (雅加達)	5,518.68	1.47	5.58
吉隆坡綜合 (馬來西亞)	1,830.78	0.49	3.95
南韓綜合 (南韓)	2,041.03	0.54	5.94
菲律賓 PSE (菲律賓)	7,940.49	0.52	9.82
印度孟買 SENSEX 30 (印度)	27,957.49	-0.07	1.67
曼谷 SET (泰國)	1,505.94	0.63	0.55
上證綜合 (上海)	3,747.90	-1.02	15.87
新加坡海峽時報 (新加坡)	3,447.01	-0.21	2.43
東証 (日本)	1,543.11	-0.94	8.61
日經平均指數 225 (東京)	19,206.99	-1.05	9.17
台灣加權 (台灣)	9,586.44	0.68	2.49
MSCI 亞洲 (日本除外) 指數	589.92	0.44	4.65

其它	收盤	漲跌%	年初至今%
巴西 Bovespa (巴西)	51,150.16	-0.18	2.29
墨西哥 Bolsa (墨西哥)	43,724.78	-0.45	1.34

政府債券 (收益率)	收盤	淨變動	年初至今
美國10年期公債	1.92	-0.02	-0.24
英國10年期公債	1.58	0.00	-0.18
德國10年期公債	0.18	-0.03	-0.36
日本10年期公債	0.41	0.03	0.07

債券	收盤	漲跌%	年初至今%
花旗全球公債	0.00	0.00	A Invalid Security
JPM 亞洲信貸 +	190.86	0.07	2.28
JPM 新興市場債券 +	570.03	-0.03	1.75
花旗美國高收益	0.00	0.00	A Invalid Security
JPM 亞洲高收益 +	234.38	0.13	2.03

利率	收盤	淨變動	年初至今
3個月倫敦美元拆息 #	Holiday	Holiday	0.02

商品 +	收盤	漲跌%	年初至今%
油價 (輕原油)	47.60	-2.22	-10.64
黃金	1,187.00	0.13	-1.58

各國貨幣	收盤	漲跌%	年初至今%
歐元*	1.07	-0.94	-11.07
美元/日圓	120.13	0.05	0.15
英鎊*	1.48	0.05	-4.71
澳元*	0.76	-0.61	-6.51

資料來源: 瀚亞投資(新加坡)有限公司。請注意, 指數表現是按本地貨幣計算。若指數並非以美元計算, 有關資料會加上“+”。漲跌點及漲跌%指相對上一個交易日。“#”3個月倫敦美元銀行同業拆息數據來自英國銀行家協會。“\*”國家貨幣以美元為單位

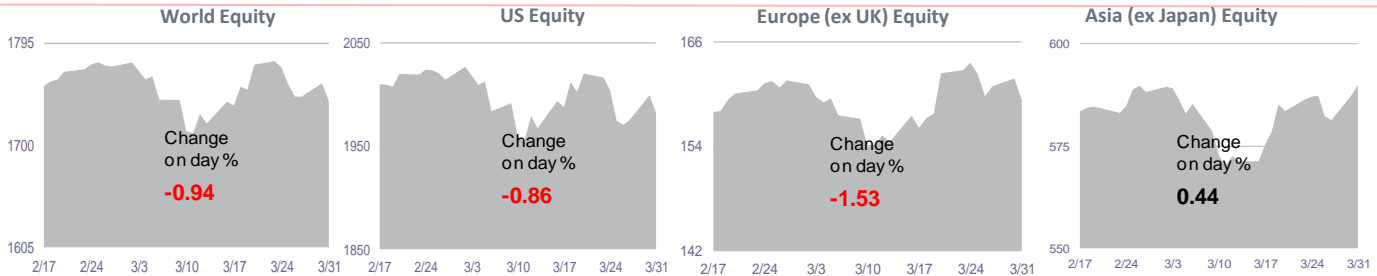
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# Daily Bulletin

April 1, 2015

- Asian stocks turned in a mixed performance on Tuesday despite a strong finish on Wall Street overnight. The markets pared early gains on worries about whether Greece can secure aid before it runs out of cash by April 20.
- US stocks closed down due to profit taking and renewed worries about the outlook for interest rates may also have weighed on the markets following remarks by Richmond Federal Reserve Bank President Jeffrey Lacker. In a speech to the Greater Richmond Chamber of Commerce, Lacker said he believes a strong case can be made for an increase in interest rates relatively soon.
- European markets finished in the red Tuesday, following the strong gains of the previous session. Investor concerns over the situation in Greece weighed on the markets, as well as Eurozone unemployment data. Unemployment remains high and came in higher than anticipated. The Greek government and its international creditors have yet to come to an agreement on reforms. According to media reports, talks between the two sides in Brussels have ended without an agreement.



Source : MSCI from Bloomberg in USD terms.

Data as of

March 31, 2015

US Indexes	Last	% Chg	%YTD Chg
Dow Jones Industrial Average	17,776.12	-1.11	-0.26
Nasdaq Composite	4,900.89	-0.94	3.48
S&P 500	2,067.89	-0.88	0.44
S&P 500 Volatility (Vix)	15.29	5.38	-20.36
MSCI US	1,981.62	-0.86	0.86

Europe Indexes	Last	% Chg	%YTD Chg
Euro Stoxx 50	3,697.38	-0.82	17.51
FTSE 100 (UK)	6,773.04	-1.72	3.15
DAX (Germany)	11,966.17	-0.99	22.03
CAC-40 (France)	5,033.64	-0.98	17.81
FTSE MIB Index (Italy)	23,157.12	-0.44	21.80
Ibex35 (Spain)	11,521.10	-0.07	12.08
MSCI Europe ex UK	159.26	-1.53	18.44

Asia Indexes	Last	% Chg	%YTD Chg
S&P/ASX (Australia)	5,891.51	0.78	8.42
NZX 50 Index (New Zealand)	5,833.99	0.22	4.78
Hang Seng (Hong Kong)	24,900.89	0.18	5.49
Jakarta Composite Index (Jakarta)	5,518.68	1.47	5.58
KLCI (Malaysia)	1,830.78	0.49	3.95
KOSPI (Korea)	2,041.03	0.54	5.94
PSEI (Philippines)	7,940.49	0.52	9.82
BSE Sensex 30 (India)	27,957.49	-0.07	1.67
SET (Thailand)	1,505.94	0.63	0.55
Shanghai SE Composite (Shanghai)	3,747.90	-1.02	15.87
Straits Times Index (Singapore)	3,447.01	-0.21	2.43
Topix (Japan)	1,543.11	-0.94	8.61
Nikkei 225 (Tokyo)	19,206.99	-1.05	9.17
Taiwan Taiex Index (Taiwan)	9,586.44	0.68	2.49
MSCI Asia ex Japan	589.92	0.44	4.65

Others	Last	% Chg	%YTD Chg
Bovespa (Brazil)	51,150.16	-0.18	2.29
Mexican Bolsa (Mexico)	43,724.78	-0.45	1.34

Government Bonds - 10 Yr Benchmark (Yield/bid)	Last	Net Chg	Net YTD Chg
US Generic Govt 10-year	1.92	-0.02	-0.24
UK Govt 10-year Note Generic	1.58	0.00	-0.18
German Govt Bonds 10-year	0.18	-0.03	-0.36
Japan Govt Bonds 10-year	0.41	0.03	0.07

Bond Indexes	Last	% Chg	%YTD Chg
Citigroup World Govt Bond	-	0.00	Security
JP Morgan Asian Credit +	190.86	0.07	2.28
JP Morgan EMBI Eurobonds +	570.03	-0.03	1.75
Citigroup US HY Market	-	0.00	Security
JP Morgan Asian HY Corp +	234.38	0.13	2.03

Interest rate	Last	Net Chg	Net YTD Chg
LIBOR USD 3-month #	Holiday	Holiday	0.02

Commodities +	Last	% Chg	%YTD Chg
Oil (Light Crude)	47.60	-2.22	-10.64
Gold	1,187.00	0.13	-1.58

Currencies	Last	% Chg	%YTD Chg
Euro *	1.07	-0.94	-11.07
Yen *	120.13	0.05	0.15
Pound *	1.48	0.05	-4.71
AUD *	0.76	-0.61	-6.51

Source: Eastspring Investments (Singapore) Limited

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