

## Treasury Sales Team

**Alina Elena Vrabioiu**

+4021 307 58 17

[alina.vrabioiu@otpbank.ro](mailto:alina.vrabioiu@otpbank.ro)

**Irina Ananiese**

+4021 307 58 17

[irina.ananiese@otpbank.ro](mailto:irina.ananiese@otpbank.ro)

**Tania Fantana**

+4021 307 58 17

[tania.fantana@otpbank.ro](mailto:tania.fantana@otpbank.ro)

## Chief Economist

**Gergely Tardos**

+36 1 374 7273

[tardosg@otpbank.hu](mailto:tardosg@otpbank.hu)

## FX/FI Strategist

**Levente Pápa**

+36 1 354 7490

[papal@otpbank.hu](mailto:papal@otpbank.hu)



# Daily Report – Global markets

**STOCK EXCHANGE**

	Close	Daily chg. (%)	Weekly chg. (%)
DJIA	14 662	↑ 0,61	↑ 0,70
S&P500	1 570	↑ 0,52	↑ 0,41
Nasdaq100	2 821	↑ 0,84	↑ 1,12
Russell2000	934	↓ -0,48	↓ -1,22
Stoxx600	298	↑ 1,27	↑ 1,28
DAX	7 944	↑ 1,91	↑ 0,81
FTSE 100	6 491	↑ 1,23	↑ 1,53
CAC40	3 805	↑ 1,98	↑ 1,51
ATX	2 383	↑ 1,30	↑ 0,26
IBEX35	8 050	↑ 1,65	↑ 0,75
Nikkei 225	12 330	↑ 2,72	↓ -1,31
Hang Seng	22 368	↑ 0,31	↑ 0,25
SSEC	2 228	↓ -0,30	↓ -3,04
SENSEX	19 041	↑ 0,93	↑ 1,80
RTS	1 440	↓ -0,38	↓ -0,37
Bovespa	54 889	↓ -1,81	↓ -1,41

**FX MARKET**

	Close	Daily chg. (%)	Weekly chg. (%)
EUR/USD	1,2807	↓ -0,09	↑ 0,21
EUR/CHF	1,2166	↑ 0,02	↓ -0,19
USD/GBP	1,5087	↓ -0,10	↓ -0,28
USD/JPY	93,51	↑ 0,10	↓ -0,97
AUD/USD	1,0455	↑ 0,09	↑ 0,11
USD/CAD	1,0144	↑ 0,01	↓ -0,15

**RISK INDICATORS**

	Close	Daily chg (bp)	Weekly chg (bp)
VIX	12,8	↓ -0,8	↓ -1,0
EMBI+ Spread	287	↑ 12	↑ 30
CDS 5Y PIIS	245	↓ -4	↑ 7
CDS 5Y Italy	240	↓ -7	↑ 5
CDS 5Y Belg.	42	↓ 0	↑ 3
iTraxx 5Y EU	120,6	↓ -5	↑ 2
US TED Spread	20,7	↓ 0	↓ -1

Source: Reuters, OTP Research

**Summary**

- Europe's major indices added 1.3-2.0% and American benchmarks gained 0.5-0.8% on Tuesday.
- The EUR/USD is still hovering around 1.28.

Europe's key indices grew by 1.3-2.0%, and their American peers advanced 0.5-0.8% (with the exception of Russell's 0.5% drop).

Vodafone closed almost 5% higher on the back of further reports about potential buy-up plans – the reported price would amount to 34% premium in comparison with the current price.

In the USA, the healthcare sector's performance was particularly good. All of S&P's sub-indices closed higher.

The morning's positive sentiment was further boosted by the favourable gauge of US new industrial orders for March (+3.0%); moreover, the February figure was revised up.

The EUR/USD remained around 1.28.

**GOV'T BOND MARKET**

	Yield (%)		Daily chg (bp)		Weekly chg (bp)
US 2Y	0,24	↓	0	↓	-2
US 10Y	1,86	↑	2	↓	-5
JP 2Y	0,06	↑	0	↑	3
JP 10Y	0,56	↑	0	↑	2
GER 2Y	-0,04	↓	-1	↓	-6
GER 10Y	1,28	↑	1	↓	-7

**CENTRAL BANKS' RATES**

	Rate (%)		6M Consensus		1Y Consensus
Fed Funds	0,25	⇒	0,25	⇒	0,25
ECB Rate	0,75	⇒	0,75	⇒	0,75
BOE Rate	0,50	⇒	0,50	⇒	0,50
BOJ Rate	0,10	⇒	0,10	⇒	0,10
SNB Target	0,00	⇒	0,00	⇒	0,00

**MONEY MARKET**

	Rate (%)		Daily chg (bp)		Weekly chg (bp)
US 3M Libor	0,28	↓	0	↓	0
US 2Y Swap	0,39	↓	0	↓	-2
US 5Y Swap	0,94	↓	0	↑	1
EUR 3M Euribor	0,21	↓	0	↓	-1
EUR 2Y Swap	0,45	↓	-1	↓	-4
EUR 5Y Swap	0,87	↓	-1	↓	0
GB 3M Libor	0,51	⇒	0	⇒	0
GB 2Y Swap	0,57	↓	-1	↓	-1
GB 5Y Swap	0,94	↓	-1	↑	0
JP 3M Libor	0,16	⇒	0	↑	0
JP 2Y Swap	0,20	↓	-1	↓	-1
JP 5Y Swap	0,27	↓	-1	↑	0
CHF 3M Libor	0,02	⇒	0	⇒	0
CHF 2Y Swap	0,05	⇒	0	⇒	0
CHF 5Y Swap	0,41	⇒	0	↑	2

**COMMODITIES**

	Close		Daily chg. (%)		Weekly chg. (%)
Oil Brent	110,3	↓	-0,32	↑	0,90
Gold	1 567	↓	-0,50	↓	-2,33

Source: Reuters, OTP Research

In the USA, the vehicle sales statistics for March more or less matched forecasts. Factory goods orders for the same period beat expectations.

In today's publications, the preliminary data for the eurozone's inflation in March and the American ADP employment statistics will see the light of day.

	COUNTRY	DATE		FACT	CONSENSUS	PREVIOUS
Tuesday	EZ	Feb	Unemployment rate (%)	12,0	12,0	11,9
	DE	Mar	CPI (preliminary, yoy, %)	1,4	1,4	1,5
	US	Mar	Vehicle sales (ann, mln)	15,27	15,30	15,32
Wednesday	EZ	Mar	Inflation (flash, y-o-y, %)		1,7	1,8
	US	Mar	ADP employment report ('000)		200	198
	US	Mar	ISM non-manufacturing PMI (point)		55,8	56,0

Source: Reuters, OTP Research

**Chief Economist**  
Gergely Tardos  
tardosg@otpbank.hu  
+36 1 374 7273

**FX/FI Strategist**  
Levente Pápa  
papal@otpbank.hu  
+36 1 354 7490

**Fundamental Analyst**  
Bálint Szaniszló  
szaniszlob@otpbank.hu  
+36 1 374 7271

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