

## Headquarter Treasury Sales

### Head of Sales

**Marius George Ionescu**

+40755 000 437

[marius.ionescu@otpbank.ro](mailto:marius.ionescu@otpbank.ro)

**Tania Fantana**

+4021 30758 17

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

**Alexandru Tibuleac**

+4021 30758 17

[alexandru.tibuleac@otpbank.ro](mailto:alexandru.tibuleac@otpbank.ro)

## Regional Treasury Sales

**Cezar Trandafirescu - Iasi**

+40755 000 246

[cezlar.trandafirescu@otpbank.ro](mailto:cezlar.trandafirescu@otpbank.ro)

**Szilamer Kozma - Cluj**

+40755 000 400

[szilamer.kozma@otpbank.ro](mailto:szilamer.kozma@otpbank.ro)

**Valentin Cioraneanu – Brasov**

+40755 000 464

[valentin.cioraneanu@otpbank.ro](mailto:valentin.cioraneanu@otpbank.ro)

**Radu Oprea – Bucharest**

+40755000474

[radu.oprea@otpbank.ro](mailto:radu.oprea@otpbank.ro)



# Daily Report – Global markets

**STOCK EXCHANGE**

	Close	Daily chg. (%)	Weekly chg. (%)
DJIA	16 368	↑ 0,56	↑ 0,19
S&P500	1 866	↑ 0,44	↓ -0,35
Nasdaq100	3 630	↑ 0,34	↓ -1,44
Russell2000	1 178	↓ -0,02	↓ -1,47
Stoxx600	329	↑ 1,29	↑ 0,20
DAX	9 338	↑ 1,63	↑ 1,04
FTSE 100	6 605	↑ 1,30	↓ -0,01
CAC40	4 344	↑ 1,59	↑ 0,72
ATX	2 453	↑ 0,77	↓ -0,95
IBEX35	9 991	↑ 0,78	↓ -0,61
Nikkei 225	14 477	↑ 0,37	↑ 0,10
Hang Seng	21 918	↑ 0,85	↑ 2,24
SSEC	2 062	↓ -0,23	↑ 2,01
SENSEX	22 152	↓ -0,23	↑ 2,01
RTS	1 170	↑ 3,41	↑ 0,77
Bovespa	48 180	↑ 0,39	↑ 3,46

**FX MARKET**

	Close	Daily chg. (%)	Weekly chg. (%)
EUR/USD	1,3810	↓ -0,11	↓ -0,16
EUR/CHF	1,2215	↑ 0,10	↑ 0,27
USD/GBP	1,6527	↑ 0,19	↓ -0,08
USD/JPY	102,31	↑ 0,05	↓ -0,02
AUD/USD	0,9191	↑ 0,31	↑ 1,67
USD/CAD	1,1151	↓ -0,13	↓ -0,74

**RISK INDICATORS**

	Close	Daily chg (bp)	Weekly chg (bp)
VIX	14,0	↓ -1,1	↓ -0,5
CDS 5Y PIIS	14	↓ -1	↓ -1
CDS 5Y Italy	112	↑ 2	↓ -2
CDS 5Y Belg.	116	↑ 3	↓ -2
iTraxx 5Y EU	27,1	↑ 0	↑ 0
US TED Spread	79,4	↑ 1	↑ 6

Source: Reuters, OTP Research

**Summary**

- Optimism ruled Tuesday's trading on global markets.
- Facebook announced a new acquisition.
- The data released in the USA have matched analysts' forecasts.

Tuesday's trading sentiment was positive on global markets. Except for the Russell's marginal dip, all US indices achieved gains. Of the S&P's sectors, industry's almost 1% advance was the best performance while the weakest sector was consumer discretionary, dropping 0.6%.

Europe's benchmarks closed Tuesday's trading higher. One of the reasons may be that a number of ECB officials talked about the possibility of further quantitative easing. Germany's DAX and France's CAC40 rallied 1.6% yesterday, marking the strongest achievement.

Asia's leading indices closed mixed. The Nikkei climbed 0.4% higher, and the Hang Seng upped by 0.9%, while the SENSEX and the Shanghai Composite made small advances.

Facebook announced a new acquisition, with a USD 2 billion price tag. A few weeks after buying WhatsApp, Facebook is now planning to purchase Oculus, the manufacturer of goggle-like headsets for video games, which takes players into virtual reality. Mark Zuckerberg said this product would be useful for non-game applications too, such as in architecture, car manufacturing, marketing, and education.

**GOV'T BOND MARKET**

	Yield (%)		Daily chg (bp)		Weekly chg (bp)
US 2Y	0,47	↑	2	↑	11
US 10Y	2,75	↑	2	↑	8
JP 2Y	0,08	↓	0	↓	0
JP 10Y	0,61	↑	0	↓	-1
GER 2Y	0,19	↓	-2	↑	3
GER 10Y	1,58	↓	-6	↑	1

**CENTRAL BANKS' RATES**

	Rate (%)		6M Consensus		1Y Consensus
Fed Funds	0,25	→	0,25	→	0,25
ECB Rate	0,25	→	0,25	→	0,25
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	0,23	↓	0	↓	0
US 2Y Swap	0,55	↑	1	↑	3
US 5Y Swap	1,79	↑	0	↑	3
EUR 3M Euribor	0,32	↓	0	↑	1
EUR 2Y Swap	0,49	↑	1	↓	0
EUR 5Y Swap	0,99	↓	-2	↓	-6
GB 3M Libor	0,52	↑	0	↑	0
GB 2Y Swap	1,02	→	0	↓	-1
GB 5Y Swap	1,98	↑	1	→	0
JP 3M Libor	0,14	→	0	↓	0
JP 2Y Swap	0,17	↓	-1	↓	-1
JP 5Y Swap	0,31	↑	1	→	0
CHF 3M Libor	0,02	→	0	↑	0
CHF 2Y Swap	0,05	↓	-1	↓	-1
CHF 5Y Swap	0,43	↓	-1	↓	-3

**COMMODITIES**

	Close		Daily chg. (%)		Weekly chg. (%)
Oil Brent	107,3	↑	0,27	↑	1,35
Gold	1 314	↑	0,27	↓	-1,27

Source: Reuters, OTP Research

Tuesday's release of German business climate index (IFO) slightly missed analysts' expectations. The UK consumer price index was in line with forecasts.

The USA published favourable macroeconomic statistics: the consumer confidence index has beaten expectations and the Case Schiller home price index matched forecasts.

Today's EU-USA summit in Brussels is likely to grab analysts' attention because the representatives of economic powers will meet without Russia's participation.

	COUNTRY	DATE	INDICATOR	FACT	CONSENSUS	PREVIOUS
Tuesday	DE	Mar	IFO business climate (point)	110,7	111,0	111
	UK	Feb	CPI (YoY, %)	1,7	1,7	1,9
	US	Jan	Case Shiller 20 (YoY, %)	13,2	13,2	13,4
	US	Mar	Consumer confidence (point)	82,3	78,6	78,1
	US	Feb	New home sales (MoM)	440,0	445,0	468,0
		Mar	EU-US meeting	-	-	-
	US	Feb	Durable goods (YoY, %)	-	1,0	-1,0
	US	Mar	Markit manufacturing PMI (flash, point)	-	-	53,3

Source: Reuters, OTP Research

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

**Fundamental Analyst**  
Balázs Süveg  
SuvegB@otpbank.hu  
+36 1 354 7490

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