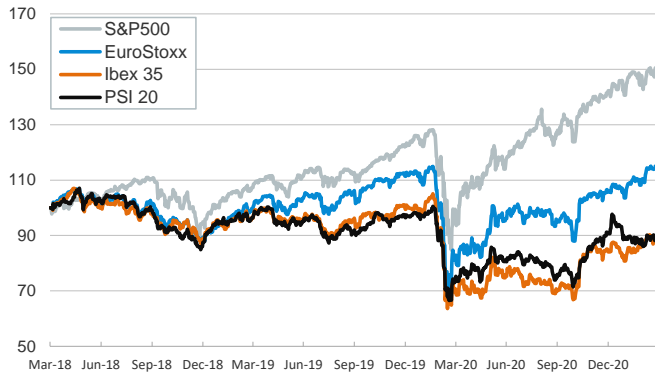


- ▶ Investors continued to trade in a mixed mood in yesterday's session. Commodity prices declined across the board while the USD strengthened. Stocks were mixed, advancing in Asia and Europe but declining moderately in the U.S.
- ▶ Sovereign yields were little changed in the U.S. but rose across euro area core and peripheral countries. ECB data showed that PEPP's gross purchases were roughly unchanged last week (€20.4bn after €20.9bn in the previous week).
- ▶ Data released this morning showed that Chinese manufacturing activity continued to expand in March (official manufacturing PMI up to 51.9 points from 50.6 in February). In Europe, economic sentiment continued to recover but remained below pre-pandemic levels (the euro area's ESI index rose to 101.0 points in March from 93.4 in February).
- ▶ Today the focus will be on the release of euro area inflation figures for March. Preliminary country-level data released yesterday point to an uptick in the area-wide figures (Germany's HICP inflation rose to 2.0% and [Spain's CPI to 1.3%](#)).

Interest Rates (%)	3/30	3/29	Daily Change (basis points)	Weekly Change (basis points)	YTD (basis points)	YoY Change (basis points)
<b>Eurozone</b>						
ECB - Official Interest Rate (Refi)	0.00	0.00	0	0	0	0
Eonia	-0.49	-0.49	0	-1	1	-5
Swap Eonia (10Y)	-0.01	-0.02	2	4	31	20
3 months (Euribor)	-0.54	-0.54	0	0	1	-18
12 months (Euribor)	-0.49	-0.49	-1	0	1	-32
Germany - 2-Year Bond	-0.69	-0.71	2	2	1	0
Germany - 10-Year Bond	-0.29	-0.32	3	6	28	19
France - 10-Year Bond	-0.04	-0.07	3	5	30	-2
Spain - 10-Year Bond	0.34	0.31	3	5	30	-33
Portugal - 10-Year Bond	0.23	0.20	3	6	20	-64
Italy - 10-Year Bond	0.68	0.64	4	8	14	-84
Risk premium - Spain (10Y)	63	63	0	-1	1	-52
Risk premium - Portugal (10Y)	52	52	0	0	-8	-82
Risk premium - Italy (10Y)	97	96	1	2	-15	-103
<b>US</b>						
Fed - Upper Bound	0.25	0.25	0	0	0	0
3 months (Libor)	0.20	0.20	0	0	-4	-125
12 months (Libor)	0.28	0.28	0	0	-6	-72
2-Year Bond	0.15	0.14	1	0	3	-10
10-Year Bond	1.70	1.71	-1	8	79	103
<b>Stock Markets</b>						
	3/30	3/29	Daily Change (%)	Weekly Change (%)	YTD (%)	YoY Change (%)
CaixaBank	2.69	2.59	3.7	5.1	27.8	58.0
Ibex 35	8595	8492	1.2	2.4	6.5	26.7
PSI 20	4890	4864	0.5	0.2	-0.2	20.2
MIB	24636	24421	0.9	2.2	10.8	44.5
DAX	15009	14818	1.3	2.4	9.4	51.1
CAC 40	6088	6016	1.2	2.4	9.7	38.5
Eurostoxx50	3926	3883	1.1	2.6	10.5	40.9
FTSE 100	6772	6736	0.5	1.1	4.8	19.4
S&P 500	3959	3971	-0.3	1.2	5.4	53.2
Nasdaq	13045	13060	-0.1	-1.4	1.2	69.4
Nikkei 225	29433	29385	0.2	1.5	7.2	55.6
MSCI Emerging Index	1320	1310	0.7	-0.3	2.2	55.5
MSCI Emerging Asia	731	726	0.8	-0.6	2.5	58.1
MSCI Emerging Latin America	2276	2245	1.4	-0.7	-7.2	44.4
Shanghai	3457	3435	0.6	1.3	-0.5	25.7
VIX Index	19.61	20.74	-5.4	-3.4	-13.8	-63.4
<b>Currencies</b>						
	3/30	3/29	Daily Change (%)	Weekly Change (%)	YTD (%)	YoY Change (%)
EUR/USD	1.172	1.177	-0.4	-1.1	-4.1	6.2
EUR/GBP	0.85	0.85	-0.3	-1.0	-4.6	-4.0
EUR/CHF	1.10	1.11	-0.1	-0.2	2.1	4.1
USD/JPY	110.36	109.81	0.5	1.6	6.9	2.6
USD/CNY	6.57	6.57	0.0	0.9	0.7	-7.2
USD/MXN	20.58	20.62	-0.2	-1.3	3.4	-13.1
<b>Commodities</b>						
	3/30	3/29	Daily Change (%)	Weekly Change (%)	YTD (%)	YoY Change (%)
Global Commodities Index	82.8	83.9	-1.4	-0.5	6.0	33.8
Brent (US\$/barrel)	64.1	65.0	-1.3	5.5	23.8	182.1
Gold (US\$/ounce)	1685.2	1712.2	-1.6	-2.4	-11.2	6.8
Metal Index	249.1	252.5	-1.4	-1.2	7.7	57.6
Agricultural Index	339.0	345.4	-1.9	-4.2	2.6	39.9

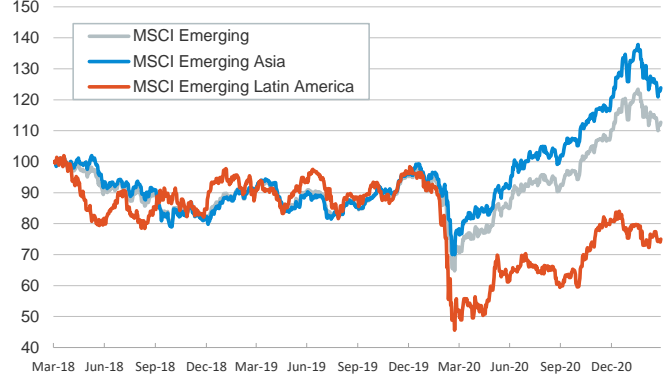
**Main advanced stock markets**

Index (100=Three years ago)



**Emerging economies stock markets**

Index (100=Three years ago)



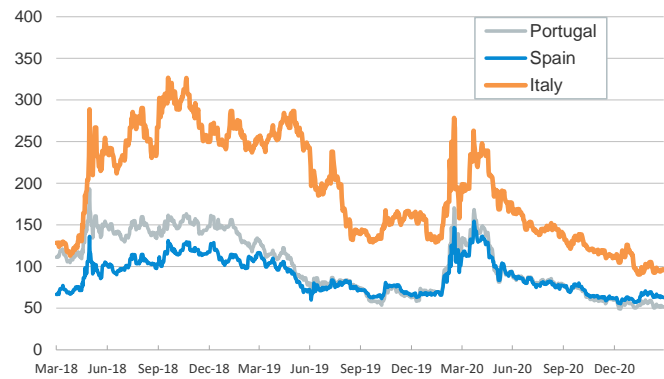
**Yield on 10-year public debt: U.S. and Germany**

(%)



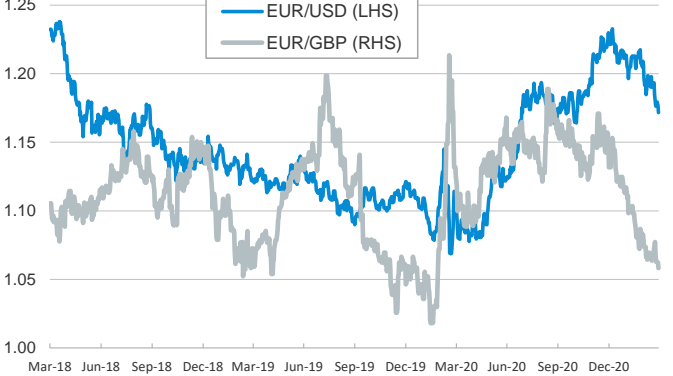
**Risk Premium on 10-year debt: Italy, Spain, and Portugal**

(basis points)



**Exchange rate: Advanced-economy currencies**

(Dollars per euro)



**Exchange rate: Emerging economies Index**

Index (100=Three years ago)



**Brent oil price**

(US\$/barrel)



**Implied volatility on US stock markets**

VIX Index



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