- Investors traded in a more cautious way in yesterday's session. U.S. and euro area sovereign yields nudged up on the back of a surge in U.S. consumer confidence (the Conference Board's index rose to 121.7 points in April, its highest level since February 2020), while global stock markets were mixed.
- In FX markets, the main currencies were little changed. In commodity markets, Brent oil prices edged higher amid reports that the OPEC+ will stick to its current production plans (which envisage a moderate easing of supply cuts in May, to be reassessed again in June).
- Today the focus will be on the outcome of the Fed's monetary policy meeting. We do not expect adjustments to policy tools yet, but we will be paying close attention to hints that shed light on the question of when the Fed will start to prepare for tapering its asset purchases.

Interest Rates (%)	4/27	4/26	Daily Change (basis points)	Weekly Change (basis points)	YTD (basis points)	YoY Change (basis points)
Eurozone						
ECB - Official Interest Rate (Refi)	**0.00**	0.00	0	0	0	0
Eonia	**-0.48**	-0.48	0	0	2	-3
Swap Eonia (10Y)	**0.02**	0.01	0	2	33	29
3 months (Euribor)	**-0.54**	-0.54	0	0	1	-30
12 months (Euribor)	**-0.48**	-0.48	-1	-1	2	-37
Germany - 2-Year Bond	**-0.69**	-0.69	0	1	1	1
Germany - 10-Year Bond	**-0.25**	-0.25	0	1	32	22
France - 10-Year Bond	**0.09**	0.08	1	2	43	9
Spain - 10-Year Bond	**0.42**	0.40	2	1	37	-43
Portugal - 10-Year Bond	**0.42**	0.41	1	1	39	-55
Italy - 10-Year Bond	**0.82**	0.80	2	4	28	-91
Risk premium - Spain (10Y)	**67**	65	1	0	5	-65
Risk premium - Portugal (10Y)	**67**	66	1	0	7	-77
Risk premium - Italy (10Y)	**107**	105	2	3	-4	-113
US						
Fed - Upper Bound	**0.25**	0.25	0	0	0	0
3 months (Libor)	**0.18**	0.18	0	0	-6	-58
12 months (Libor)	**0.28**	0.28	0	-1	-6	-63
2-Year Bond	**0.18**	0.17	1	3	6	-3
10-Year Bond	**1.62**	1.57	5	6	71	101

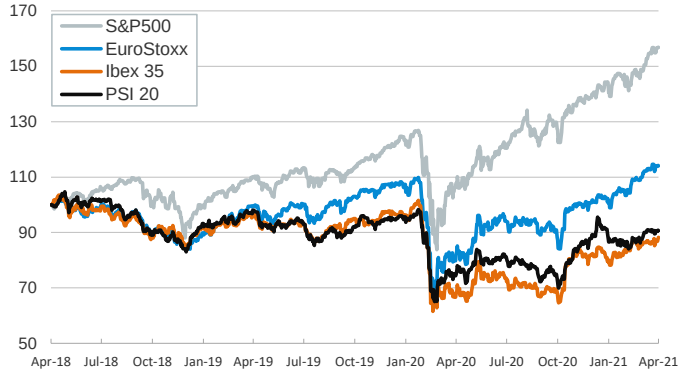
Stock Markets	4/27	4/26	Daily Change (%)	Weekly Change (%)	YTD (%)	YoY Change (%)
CaixaBank	**2.61**	2.55	2.3	4.3	24.0	65.1
Ibex 35	**8757**	8702	0.6	3.5	8.5	28.1
PSI 20	**5013**	5021	-0.2	1.3	2.3	19.0
MIB	**24473**	24514	-0.2	1.6	10.1	38.4
DAX	**15249**	15296	-0.3	0.8	11.2	41.3
CAC 40	**6274**	6276	0.0	1.8	13.0	37.3
Eurostoxx50	**4012**	4021	-0.2	1.8	12.9	36.8
FTSE 100	**6945**	6963	-0.3	1.2	7.5	16.6
S&P 500	**4187**	4188	0.0	1.3	11.5	46.2
Nasdaq	**14090**	14139	-0.3	2.2	9.3	63.7
Nikkei 225	**28992**	29126	-0.5	-0.4	5.6	46.6
MSCI Emerging Index	**1362**	1361	0.1	1.1	5.5	50.9
MSCI Emerging Asia	**752**	750	0.2	1.1	5.4	52.5
MSCI Emerging Latin America	**2413**	2430	-0.7	0.1	-1.6	48.7
Shanghai	**3443**	3441	0.0	-0.9	-0.9	22.5
VIX Index	**17.56**	17.64	-0.5	-6.0	-22.8	-47.7

Currencies	4/27	4/26	Daily Change (%)	Weekly Change (%)	YTD (%)	YoY Change (%)
EUR/USD	**1.209**	1.209	0.0	0.5	-1.0	11.7
EUR/GBP	**0.87**	0.87	0.0	0.6	-2.8	-0.2
EUR/CHF	**1.10**	1.10	0.0	0.2	2.2	4.7
USD/JPY	**108.70**	108.08	0.6	0.5	5.3	1.7
USD/CNY	**6.48**	6.49	0.0	-0.3	-0.7	-8.4
USD/MXN	**20.06**	19.87	0.9	0.4	0.7	-17.5

Commodities	4/27	4/26	Daily Change (%)	Weekly Change (%)	YTD (%)	YoY Change (%)
Global Commodities Index	**90.1**	89.5	0.6	3.6	15.4	51.0
Brent (US$/barrel)	**66.4**	65.7	1.2	-0.2	28.2	224.6
Gold (US$/ounce)	**1776.6**	1781.4	-0.3	-0.1	-6.4	4.0
Metal Index	**270.9**	269.3	0.6	5.0	17.2	66.0
Agricultural Index	**397.5**	397.0	0.1	7.9	20.3	76.1

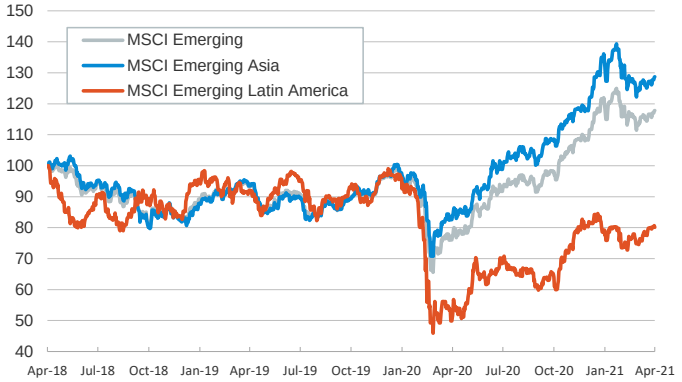
Main advanced stock markets

Index (100=Three years ago)



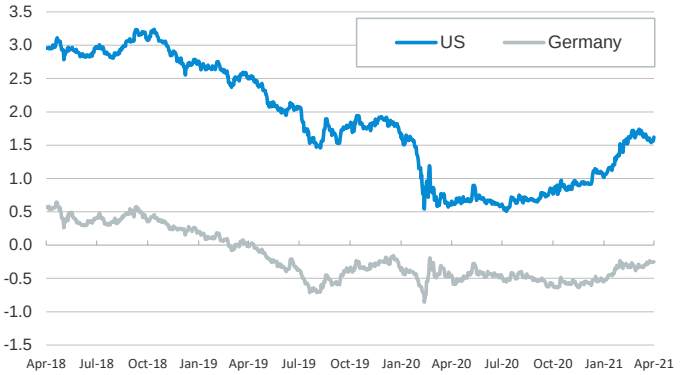
Emerging economies stock markets

Index (100=Three years ago)



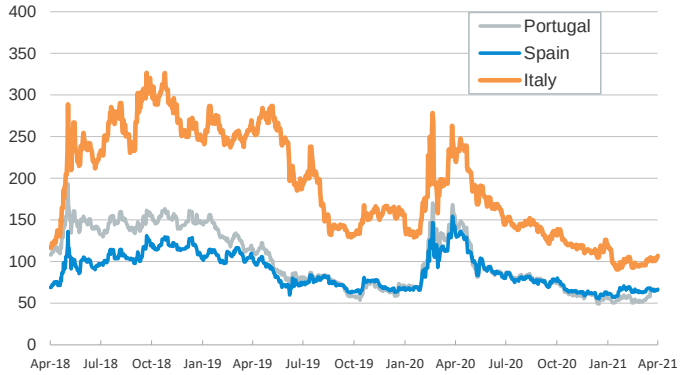
Yield on 10-year public debt: U.S. and Germany

(%)



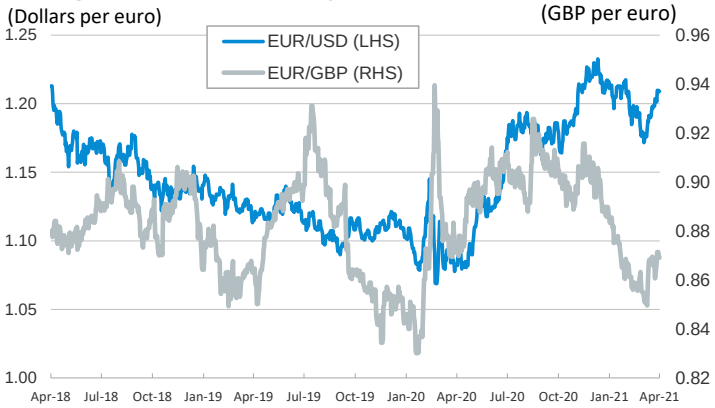
Risk Premium on 10-year debt: Italy, Spain, and Portugal

(basis points)



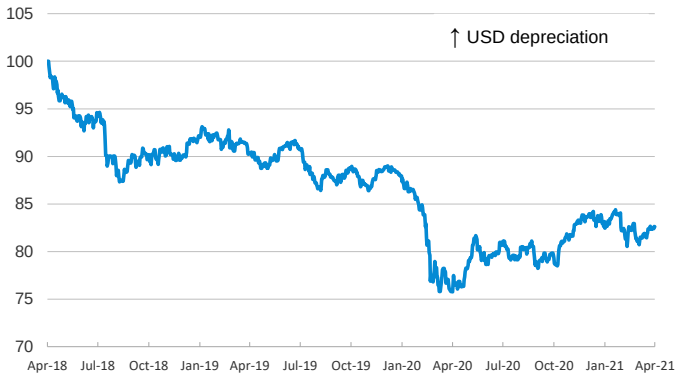
Exchange rate: Advanced-economy currencies

(Dollars per euro) (GBP per euro)



Exchange rate: Emerging economies Index

Index (100=Three years ago)

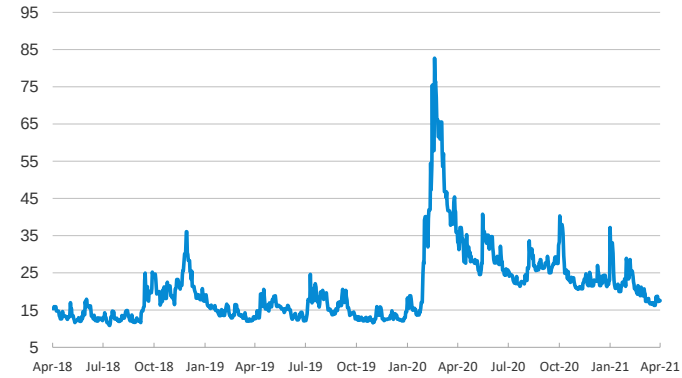


Brent oil price

(US$/barrel)

Implied volatility on US stock markets

VIX Index



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