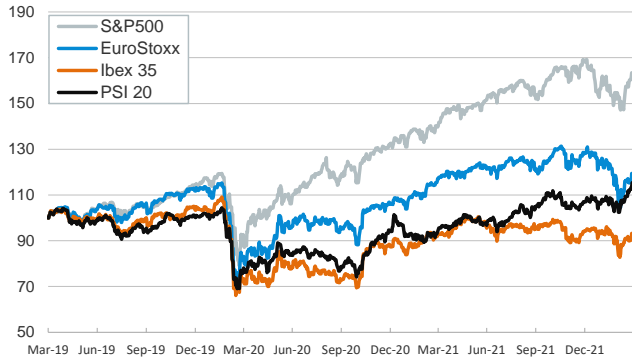


- ▶ In yesterday's session, investors' sentiment worsened amid mixed signals in the ongoing Russian-Ukrainian talks, concerns about gas supplies in Germany and rising inflationary pressures in the euro area. In Germany and in Spain, inflation rose in March to 7.6% and 9.8%, led by an increase in energy prices.
- ▶ In Europe, stock indices were mixed while sovereign yields rose as financial markets are now expecting a more hawkish response from the ECB against rising inflation. Peripheral spreads widened modestly. In the US, equities and yields on sovereign bonds declined.
- ▶ Elsewhere, the US dollar weakened against most advanced and emerging economies' currencies and the euro fluctuated above \$1.11. Brent and European gas prices rose.
- ▶ Today the focus will be on euro area unemployment and US PCE deflator for February and the OPEC+ meeting.

Interest Rates (%)	3/30	3/29	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
€STR	-0.58	-0.58	0	0	1	-1
Swap €STR (10Y)	1.03	1.01	2	22	94	112
3 months (Euribor)	-0.46	-0.47	1	3	11	7
12 months (Euribor)	-0.10	-0.11	0	6	40	38
Germany - 2-Year Bond	0.00	-0.05	6	26	62	69
Germany - 10-Year Bond	0.65	0.63	1	18	82	94
France - 10-Year Bond	1.07	1.05	2	15	88	112
Spain - 10-Year Bond	1.54	1.50	5	17	98	121
Portugal - 10-Year Bond	1.43	1.39	4	18	97	121
Italy - 10-Year Bond	2.13	2.11	1	15	96	146
Risk premium - Spain (10Y)	90	86	3	-1	15	27
Risk premium - Portugal (10Y)	79	76	3	0	15	27
Risk premium - Italy (10Y)	148	148	0	-4	13	52
US						
Fed - Upper Bound	0.50	0.50	0	0	25	25
3 months (Libor)	1.01	1.01	0	4	80	82
12 months (Libor)	2.20	2.20	0	19	162	192
2-Year Bond	2.31	2.36	-5	21	158	215
10-Year Bond	2.35	2.39	-4	6	84	61
Stock Markets						
	3/30	3/29	Daily Change (%)	Weekly Change (%)	YTD (%)	YoY Change (%)
CaixaBank	3.14	3.16	-0.6	2.7	30.2	19.1
Ibex 35	8551	8615	-0.7	2.7	-1.9	-0.3
PSI 20	6008	5922	1.4	4.0	7.9	21.9
MIB	25300	25308	0.0	4.1	-7.5	2.6
DAX	14606	14820	-1.4	2.3	-8.1	-2.7
CAC 40	6742	6792	-0.7	2.4	-5.8	11.1
Eurostoxx50	3959	4002	-1.1	2.3	-7.9	1.0
FTSE 100	7579	7537	0.6	1.6	2.6	12.9
S&P 500	4602	4632	-0.6	3.3	-3.4	15.8
Nasdaq	14442	14620	-1.2	3.7	-7.7	9.0
Nikkei 225	28027	28252	-0.8	0.0	-2.7	-3.9
MSCI Emerging Index	1149	1136	1.1	0.8	-6.7	-12.7
MSCI Emerging Asia	612	603	1.4	0.3	-8.2	-15.9
MSCI Emerging Latin America	2679	2676	0.1	3.3	25.8	16.4
Shanghai	3267	3204	2.0	-0.1	-10.3	-5.1
VIX Index	19.33	18.90	2.3	-18.0	12.3	-0.4
Currencies						
	3/30	3/29	Daily Change (%)	Weekly Change (%)	YTD (%)	YoY Change (%)
EUR/USD	1.116	1.109	0.7	1.4	-1.9	-4.9
EUR/GBP	0.85	0.85	0.4	2.0	1.0	-0.2
EUR/CHF	1.03	1.03	-0.2	0.6	-0.7	-6.9
USD/JPY	121.83	122.88	-0.9	0.6	5.9	10.0
USD/CNY	6.35	6.36	-0.3	-0.4	-0.1	-3.1
USD/MXN	19.88	19.98	-0.5	-1.7	-3.2	-2.7
Commodities						
	3/30	3/29	Daily Change (%)	Weekly Change (%)	YTD (%)	YoY Change (%)
Global Commodities Index	126.5	123.6	2.3	-1.9	27.5	51.5
Brent (US\$/barrel)	113.5	110.2	2.9	-6.7	45.9	78.5
Dutch TTF Natural Gas (EUR/MWh)	119.0	108.4	9.8	1.7	69.1	526.4
Gold (US\$/ounce)	1932.9	1919.4	0.7	-0.6	5.7	13.2

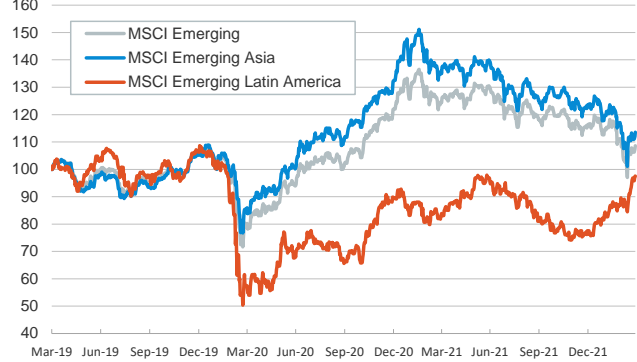
Main advanced stock markets

Index (100=Three years ago)



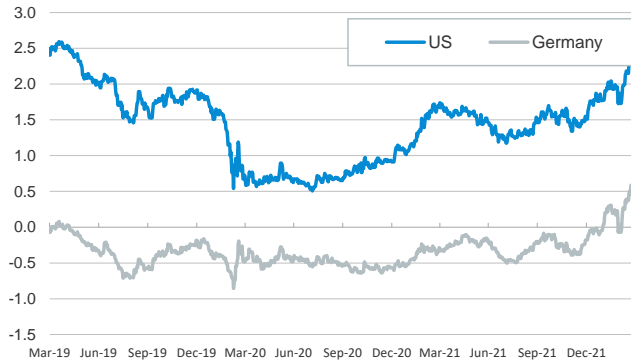
Emerging economies stock markets

Index (100=Three years ago)



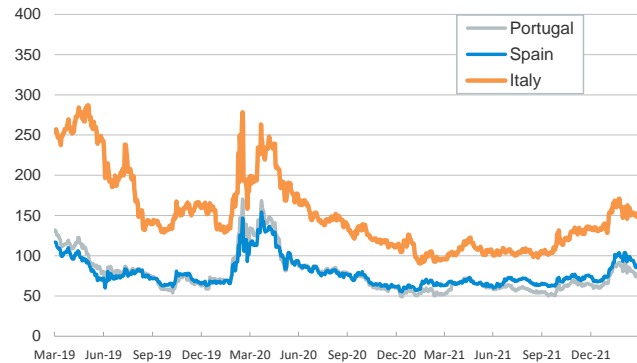
Yield on 10-year public debt: U.S. and Germany

(%)



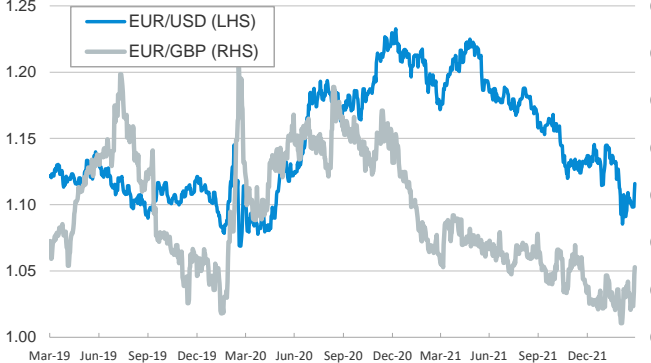
Risk Premium on 10-year debt: Italy, Spain, and Portugal

(basis points)



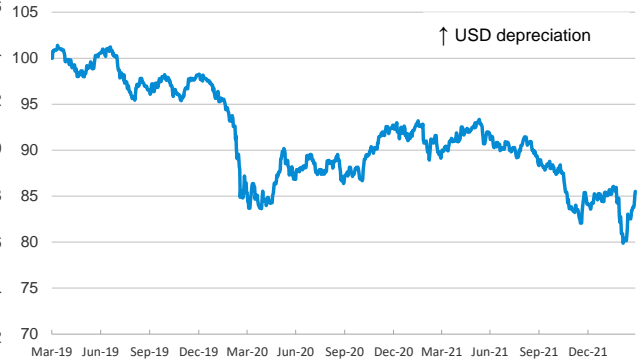
Exchange rate: Advanced-economy currencies

(Dollars per euro)



Exchange rate: Emerging economies Index

Index (100=Three years ago)



Brent oil price

(US\$/barrel)



Dutch TTF Natural gas price

(€/MWh)



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