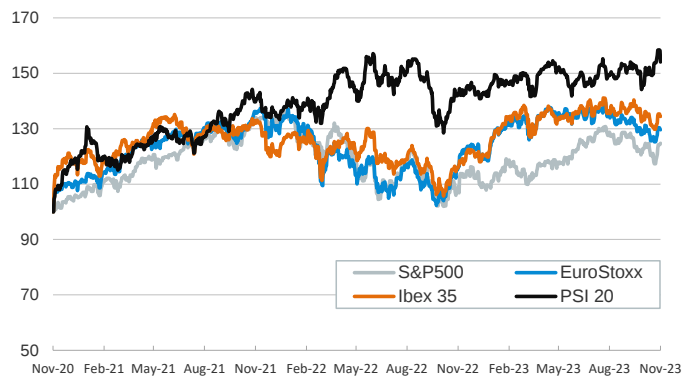


- ▶ The possible end of the central banks' hiking cycle continued to weigh on financial markets' sentiment yesterday. A list of FOMC members said yesterday that the US economy remains strong but expressed a generalized preference for remaining patient amid rising uncertainty in the coming months.
- ▶ In this context, yields on sovereign bonds declined on both sides of the Atlantic. In the euro area, peripheral spreads narrowed except for Portugal following the resignation of Prime minister Antonio Costa after revelations about an investigation into possible government corruption.
- ▶ In equity markets, indices declined in the euro area and Asia but rose in the US, thanks to the technology sector performance. Elsewhere, the US dollar strengthened against most of its peers and oil prices declined.
- ▶ Today the focus will be on the release of the September retail sales data for the euro area.

Interest Rates (%)	11/7	11/6	Daily Change (bp)	Weekly Change (bp)	YTD (bp)	YoY Change (bp)
Euro area						
ECB - Official Interest Rate (Refi)	4.50	4.50	0	0	200	250
€STR	3.90	3.90	0	2	201	250
Swap €STR (10Y)	2.94	3.01	-7	-20	0	8
3 months (Euribor)	3.97	3.96	0	-1	183	222
12 months (Euribor)	4.03	4.02	1	-2	74	121
Germany - 2-Year Bond	2.98	3.02	-4	-3	32	78
Germany - 10-Year Bond	2.66	2.74	-8	-15	22	32
France - 10-Year Bond	3.25	3.34	-9	-17	29	39
Spain - 10-Year Bond	3.72	3.80	-8	-17	20	33
Portugal - 10-Year Bond	3.39	3.45	-6	-13	-4	8
Italy - 10-Year Bond	4.54	4.64	-10	-18	3	6
Risk premium - Spain (10Y)	106	106	0	-2	-2	2
Risk premium - Portugal (10Y)	73	71	3	2	-26	-24
Risk premium - Italy (10Y)	189	190	-1	-3	-19	-25
US						
Fed - Upper Bound	5.50	5.50	0	0	100	150
Fed Funds Rate Future (Dec.-23)	5.34	5.34	0	-3	70	70
3 months (SOFR)	5.37	5.37	0	-1	78	116
12 months (SOFR)	5.26	5.26	0	-11	39	33
2-Year Bond	4.92	4.93	-1	-17	49	20
10-Year Bond	4.57	4.64	-7	-36	70	36
Stock Markets	11/7	11/6	Daily Change (%)	Weekly Change (%)	YTD (%)	YoY Change (%)
CaixaBank	3.77	3.82	-1.4	-1.8	2.5	12.7
Ibex 35	9236	9242	-0.1	2.4	12.2	16.0
PSI 20	6227	6390	-2.5	-0.5	8.8	8.0
MIB	28396	28593	-0.7	2.4	19.8	20.9
DAX	15153	15136	0.1	2.3	8.8	12.0
CAC 40	6986	7014	-0.4	1.5	7.9	8.9
Eurostoxx50	4153	4159	-0.1	2.3	9.5	12.0
S&P 500	4378	4366	0.3	4.4	14.0	15.0
Nasdaq	13640	13519	0.9	6.1	30.3	29.1
Nikkei 225	32272	32708	-1.3	4.6	23.7	17.2
MSCI Emerging Index	961	969	-0.9	5.0	0.4	7.1
MSCI Emerging Asia	513	518	-1.0	4.8	-0.2	9.8
MSCI Emerging Latin America	2362	2351	0.5	8.0	11.0	2.3
Shanghai	3057	3058	0.0	1.3	-1.0	-0.7
VIX Index	14.81	14.89	-0.5	-18.4	-31.7	-39.2
Currencies	11/7	11/6	Daily Change (%)	Weekly Change (%)	YTD (%)	YoY Change (%)
EUR/USD	1.070	1.072	-0.2	1.2	0.0	6.8
EUR/GBP	0.87	0.87	0.2	0.0	-1.7	0.0
EUR/CHF	0.96	0.96	-0.1	0.0	-2.7	-2.8
USD/JPY	150.37	150.07	0.2	-0.9	14.7	2.6
USD/CNY	7.28	7.27	0.1	-0.5	5.5	0.7
Commodities	11/7	11/6	Daily Change (%)	Weekly Change (%)	YTD (%)	YoY Change (%)
Global Commodities Index	103.0	105.0	-1.9	-1.5	-8.7	-12.8
Brent (US\$/barrel)	81.6	85.2	-4.2	-6.6	-5.0	-16.7
TTF Natural Gas-1M Future (€/MWh)	46.1	44.8	2.7	-4.1	-39.6	-58.0
TTF Natural Gas-Dec.-23 Future (€/MWh)	46.1	44.8	2.7	-4.1	-45.3	-62.9
Gold (US\$/ounce)	1969.5	1978.1	-0.4	-0.7	8.0	17.5

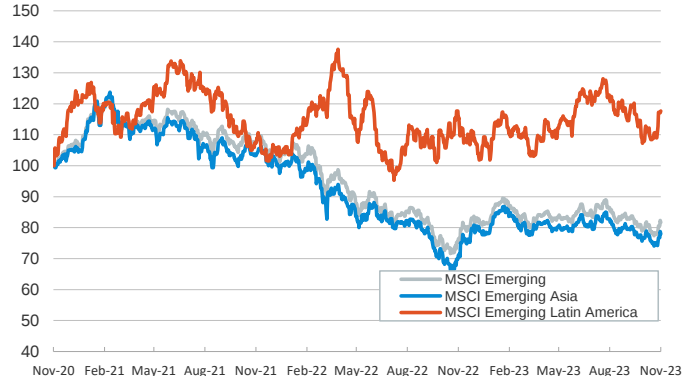
Main advanced stock markets

Index (100=Three years ago)



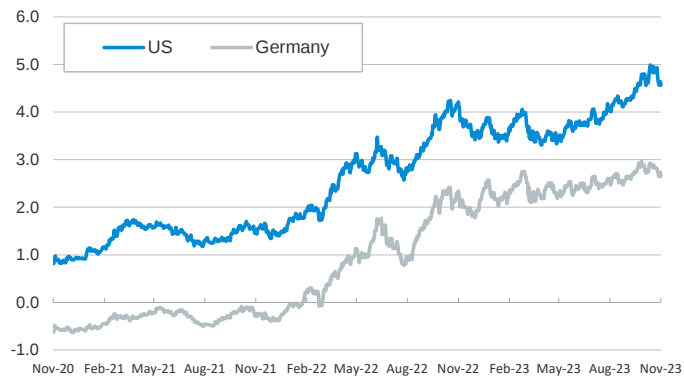
Emerging economies stock markets

Index (100=Three years ago)



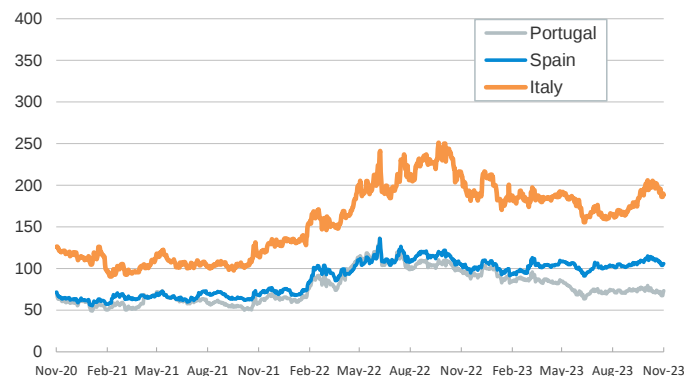
Yield on 10-year public debt: U.S. and Germany

(%)



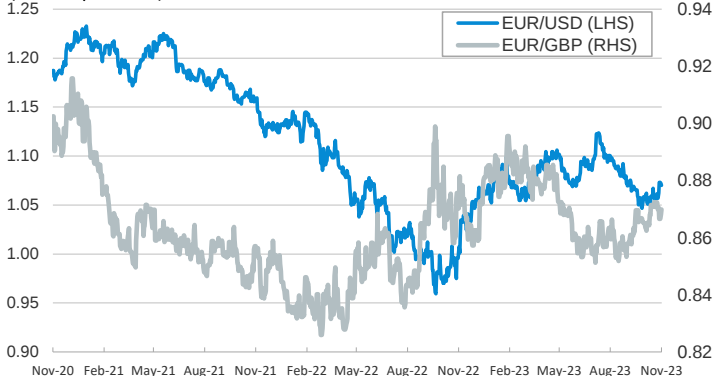
Risk Premium on 10-year debt: Italy, Spain, and Portugal

(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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