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Global Daily Report

Summary

- Friday's trading session ended mixed on the stock markets of the world, including the CEE region
- The USD firmed against the EUR but lost ground versus the JPY
- The conservative Austrian People's party won national elections.

Friday's trading session ended mixed on the stock markets of the world. In Europe, the DAX inched up 0.1%, while the CAC40 dropped 0.2% and the FTSE100 shed 0.3%. Of America's benchmark indices, the S&P500 edged 0.1% higher, and the NASDAQ100 upped 0.4%. Investor sentiment was likewise heterogeneous in the CEE region, with the WIG20 sinking 0.6% and the BUX climbing 0.3% higher.

Asia's markets looked mixed this morning. The Nikkei closed 0.5% higher while the SSEC fell 0.6%.

Currency markets saw noticeable shifts on Friday. The USD appreciated 0.4% against the EUR but weakened 0.6% versus the yen (JPY).

The conservative Austrian People's Party (ÖVP) came out top in the weekend's national elections (31.36%), in line with expectations. It preceded both the far-right FPÖ and the centre-left Social Democrats (SPÖ). The head of the Austrian People's Party, Sebastian Kurz (31) is set to become Austria's Chancellor.

In Friday's trading, oil prices slipped about 1%, while precious metal prices rose nearly 1%. The number of US oil rigs dropped to 743 (by five), according to Baker Hughes' data released on Friday.

Today's important publication is the New York Fed's manufacturing index, which analysts had expected to have contracted since the previous month. Later in the week, chiefly monthly data are due out. The Friday speech of the Fed chair will be also important. Moody's is to review Hungary's credit rating on Friday night.

	Stocks				Bonds				Commodity & FX			
	Product name	Close	Daily change (%)	YTD (%)	Product name	Yield	Daily change*	YTD*	Product name	Close	Daily change (%)	YTD (%)
Global	S&P500	2553,2	0,1	14,0	VIX	9,6	-3,0	-32	WTI	51,45	1,7	-4,2
	DOW	22871,7	0,1	15,7	US 2Y	1,50	-2,0	30	Brent	57,17	1,6	0,6
	Nasdaq100	6092,5	0,4	25,3	US 10Y	2,28	-4,3	-15	Gold	1304,5	0,9	13,3
	DAX	12991,9	0,1	13,2	GER 2Y	-0,72	-1,7	7	Silver	17,35	1,0	8,9
	CAC40	5351,7	-0,2	10,1	GER 10Y	0,40	-4,6	20	EUR/USD	1,1822	-0,1	12,5
	FTSE 100	7535,4	-0,3	5,5	PT10Y	2,34	1,1	-142	EUR/GBP	0,8896	-0,3	4,4
	FTSE MIB	22413,5	0,1	16,5	IT 10Y	2,07	-5,7	24	EUR/NOK	9,3259	-0,2	2,6
	Stoxx600	391,4	0,3	8,3	SP 10	1,60	-3,8	21	USD/CAD	1,2466	0,0	-7,2
	- Banks	163,5	-0,5	21,9	iTRAXX	55,3	-1,3	-24	AUD/USD	0,7888	0,9	9,3
	Nikkei 225	21255,6	0,5	11,2	JPY 2Y	-0,14	-0,1	4	USD/JPY	111,84	-0,4	-4,3
SSEC	3368,8	-0,6	8,5	JPY 10Y	0,06	-0,2	1	GBP/USD	1,3284	0,2	7,7	
Regional	RTS	1156,6	1,1	0,4	RUS10	7,49	-0,5	-11	USD/RUB	57,171	-1,0	-7
	WIG20	2528,16	-0,4	29,8	POL 10	3,31	-1,9	-9	EUR/PLN	4,2455	-0,5	-3,6
	PX50	1053,1	-0,2	14,3	CZ10	1,37	0,0	193	EUR/RON	4,5848	0,0	1,1
Hungary	BUX	38895	0,3	21,5	3M TB	0,03	0	-13	EUR/HUF	307,99	-0,2	-0,3
	OTP	10575	-0,2	25,9	1Y	0,04	0	-14	USD/HUF	260,43	-0,1	-11,3
	MOL	3172	2,3	23,0	3Y	0,52	-2	-34	CHF/HUF	267,07	-0,1	-7,2
	MTelekom	482	0,0	-3,2	5Y	1,28	-3	-49	PLN/HUF	72,470	0,3	3,5
	Richter	6525	-1,5	5,1	10Y	2,59	-6	-61	GBP/HUF	346,29	0,2	-4

* In the case of bond yields, the change is in basis points instead of percentage (VIX and ITRAXX not included).

Data	Cd.	Event/Data	Period	Fact	Cons.	Prev.
2017 10. 16.	14 : 30	US	New York Fed Manufacturing index (points)	Oct.	20,75	24,4
17.	9 : 00	HU	Construction output (yoy, %)	Aug.	-	22,7
	10 : 30	UK	Inflation (yoy, %)	Sept.	3	2,9
	10 : 30	UK	Core inflation (yoy, %)	Sept.	2,7	2,7
	11 : 00	DE	ZEW Economic Sentiment (points)	Oct.	19,5	17,0
	12 : 00	EZ	CPI (final, yoy, %)	Sept.	1,5	1,5*
	15 : 15	US	Industrial production (mom, %)	Sept.	0,3	-0,90
18.	14 : 30	US	Housing starts (annualized monthly, '000s)	Sept.	1175	1180,0
	14 : 30	US	Building permits (annualized monthly, '000s)	Sept.	1255	1272,0
	20 : 00	US	Beige Book	Oct.	-	-
19.	4 : 00	CN	Infrastructural investments (yoy, %)	Sept.	7,7	8
	4 : 00	CN	Industrial production (yoy, %)	Q3	6,2	6,0
	9 : 00	CN	Retail sales (yoy, %)	Aug.	10,2	10,1
	4 : 00	CN	GDP (yoy, %)	Sept.	6,8	6,9
	4 : 00	CN	GDP (qoq, %, SA)	Sept.	1,7	1,7
	4 : 00	HU	Gross wages (yoy, %)	Q3	-	13,1
	10 : 30	UK	Retail sales (mom, %)	Sept.	-0,2	1,0
	16 : 00	US	Leading index (mom, %)	Sept.	0,2	0,4
20.	16 : 00	US	Existing home sales (mom, %)	Sept.	5310	5350,0
	23 : 55	HU	Moody's Credit Rating decision	Oct.	-	Baa3 stabil
21.	1 : 15	US	Janet Yellen's speech (Washington)	Oct.	-	-

* preliminary data

Source: Reuters, OTP Research

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