

# Global Daily Report



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### Summary

- Optimism ruled the world's stock markets on Tuesday.
- The Nasdaq100 and the S&P500 closed at record highs.
- Crude oil prices continued to grow yesterday.

The figures of the earnings season determined the sentiment on the advanced world's stock markets on Tuesday, when the key indices posted gains. America's Nasdaq100 and S&P500 closed at all-time highs. Amid a flurry of quarterly reports, Twitter stood out by sky-rocketing 15% owing to the cheering earnings figures. Second to it was Hasbro, surging 14.2% on the day when its report came out. Likewise, investors appreciated the encouraging quarterly figures in the reports of Coca-Cola and United Technologies. Conversely, Procter&Gamble closed 2.7% lower, owing to the modest guidance for this year.

The US dollar firmed slightly against the euro on Tuesday. The US 10Y yield dropped to 2.57%.

Monday's announcement that the USA will sanction countries that buy oil from Iran after 1 May has pushed Brent and WTI crude prices higher. The key precious and industrial metal prices slipped.

Asia's key indices closed in the red this morning. The yen firmed trivially against the US dollar.

Germany will publish the April reading of the IFO economic sentiment index.

	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	2933,7	0,9	17,0	VIX	12,3	-1,1	-52	WTI	66,0	0,5	45,4
	DOW	26656,4	0,5	14,3	US 2Y	2,36	-2,5	-13	Brent	74,51	0,6	38,5
	Nasdaq100	7810,7	1,3	23,4	US 10Y	2,57	-2,0	-12	Gold	1272,2	-0,2	-0,8
	DAX	12235,5	0,1	15,9	GER 2Y	-0,59	0,1	0	Silver	14,82	-1,1	-4,3
	CAC40	5591,7	0,2	18,2	GER 10Y	0,04	1,8	-20	EUR/USD	1,1225	-0,3	-2,1
	FTSE 100	7523,1	0,8	11,8	PT10Y	1,20	3,3	-52	EUR/GBP	0,8676	0,1	-3,4
	FTSE MIB	21896,8	-0,3	19,5	IT 10Y	2,68	8,6	-9	EUR/NOK	9,5920	0,3	-3,2
	Stoxx600	391,4	0,2	15,9	SP 10	1,12	5,7	-30	USD/CAD	1,3422	0,6	-1,6
	- Banks	125,7	-1,3	11,2	iTRAXX	57,8	0,7	-34,4	AUD/USD	0,7101	-0,4	0,7
	Nikkei 225	22186,5	-0,3	10,9	JPY 2Y	-0,15	0,1	-1	USD/JPY	111,86	-0,1	2,1
SSEC	3197,1	0,0	28,2	JPY 10Y	-0,04	-1,0	-4	GBP/USD	1,2937	-0,3	1,4	
Regional	RTS	1277,7	0,2	19,8	RUS10	8,3	0,4	-5	USD/RUB	63,694	-0,1	-8,6
	WIG20	2370,63	0,2	4,1	POL 10	2,9	0,7	2	EUR/PLN	4,28	0,0	-0,1
	PX50	1098,5	-0,3	11,3	CZ10	1,9	0,6	-5	EUR/RON	4,757	0,1	2,3
Hungary	BUX	43245	1,0	10,5	3M DKJ	0,03	-6,0	-4	EUR/HUF	320,48	0,1	-0,1
	OTP	12980	-0,2	15,0	1Y	0,27	0,4	-18	USD/HUF	285,31	0,3	2,0
	MOL	3380	2,1	9,8	3Y	1,40	1,6	15	CHF/HUF	280,12	-0,1	-1,9
	MTelekom	462	-0,2	5,0	5Y	2,18	2,0	-35	PLN/HUF	74,82	0,1	0,3
	Richter	5845	2,5	7,6	10Y	3,27	3,0	23	GBP/HUF	370,43	0,3	4,0

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

Sources: Reuters, OTP Research

Data	Cd.	Event/Data	Period	Fact	Cons.	Prev.
2019 4. 22. 16 : 00	US	Existing home sales (mom, %)	Mar	5210	5300	5510
23. 16 : 00	US	New home sales (annualized monthly, '000s)	Mar	692	650	667
16 : 00	EZ	Consumer confidence (point)	Apr	-7,9	-7,0	-7,2
24. 10 : 00	DE	IFO Economic sentiment index (points)	Apr		99,9	99,6
16 : 00	CA	Interest rate decision (%)	Apr		1,8	1,8
25. 5 : 00	JP	Interest rate decision (%)	Apr		-0,1	-0,1
13 : 00	TR	Interest rate decision (%)	Apr		24,0	24,0
14 : 30	US	Continuing jobless claims ('000s)	weekly		1699	1653
14 : 30	US	Initial jobless claims ('000s)	weekly		200	192
14 : 30	US	Durable goods orders (mom, %)	Mar		0,4	-1,6
26. 14 : 30	US	GDP (preliminary, annualized qoq, %)	Q1		1,8	2,2

Sources: Reuters, OTP Research

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