



WEEKLY FINANCIAL MARKET OVERVIEW period 19.04.2021.-25.04.2021.

Financial Markets	Price	5D,%	1M,%	YTD,%	1YR,%
S&P 500 INDEX	4 180.17	-0.13	5.17	11.29	47.36
DOW JONES INDUS. AVG	34 043.49	-0.46	2.93	11.23	43.19
STOXX Europe 600 Index	439.04	-0.78	2.84	10.03	33.21
DAX INDEX	15 279.62	-1.17	3.60	11.38	47.83
RTS Index	1 387.46	0.99	4.28	8.97	39.82
SHANGHAI SE COMPOSITE	3 474.17	-0.67	1.05	-0.54	23.00
NIKKEI 225	29 020.63	-1.88	-0.17	6.13	51.21
MSCI WORLD	2 946.11	0.07	4.66	9.52	48.22
European Renewable Energy Index	2 523.12	4.53	7.01	-8.34	88.79
Chicago Board Options Exchange Volatility Index (VIX)	17.33	6.65	-8.11	-23.82	-51.77
Commodities	Price	5D,%	1M,%	YTD,%	1YR,%
GOLD Futures	1 777.00	-0.11	3.01	-6.23	2.52
SILVER Futures	26.08	0.61	3.60	-1.58	70.31
LME COPPER 3MO (S)	9 401.00	3.70	6.36	22.99	85.09
LME NICKEL 3MO (S)	16 063.00	0.20	1.52	-1.31	34.73
Brent	66.11	-2.33	1.42	26.43	205.46
WTI	62.14	-2.87	0.97	26.88	263.40
Currencies	Price	5D,%	1M,%	YTD,%	1YR,%
EUR/USD	1.21	0.54	2.62	-1.00	11.85
USD/JPY	107.88	0.21	1.68	-4.20	-0.50
GBP/USD	1.39	-0.60	0.82	1.84	12.09
Money Market	Price	5D,%	1M,%	YTD,%	1YR,%
LIBOR USD 3M	0.18	-3.65	-9.59	-23.91	-81.70
LIBOR EUR 3M	-0.54	0.26	0.99	4.06	-268.16
EURIBOR 3M	-0.54	-0.19	-0.37	1.10	-234.78
EUR SWAP (EONIA) 3M	-0.49	0.23	-0.37	-1.63	-1.91
Government Bonds	Yield	5D,%	1M,%	YTD,%	1YR,%
US Government Bonds 10 YR (USD)	1.56	-1.38	-5.57	73.30	163.42
German Government Bonds 10 YR (EUR)	-0.26	1.28	32.95	59.23	50.95
UK Government Bonds 10 YR (GBP)	0.74	-2.62	-2.49	277.67	154.80
Swiss Government Bonds 10 YR (CHF)	-0.25	-3.65	26.77	58.73	48.53
Japan Government Bonds 10 YR (JPY)	0.07	-23.53	-13.33	225.00	750.00

Main events of the previous week

Last week, the European Central Bank (ECB) kept its base lending rate at zero. The rate on deposits also remained at the same level - minus 0.5%, and the rate on short-term loans - at 0.25%. The European Central Bank intends to further support the economies of the member states by buying up their debt obligations. ECB President Christine Lagarde, speaking after the meeting of the Governing Council, called the debate about the end of the stimulus policy premature. The package allocated for anti-crisis measures amounts to 1 trillion 850 billion euros and is designed for the period until March 2022. Lagarde said that while recovering demand and strong financial stimulus are supporting global and euro-area economy, the immediate economic outlook is still clouded by uncertainty over a possible resurgence of the level of infection and the pace of vaccination campaigns. The decision taken last month to significantly increase the rate of spending of the program will be maintained in the second quarter, the ECB said in a statement.

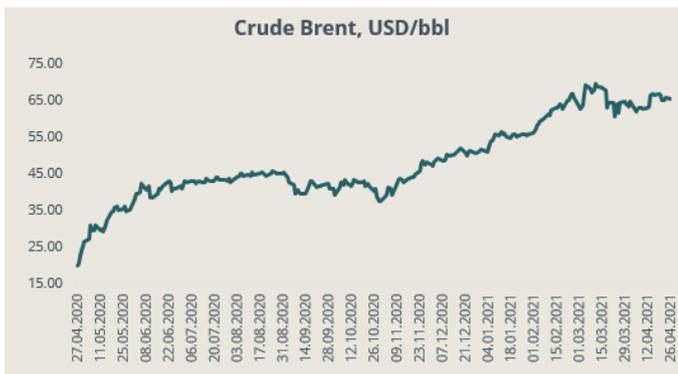


Economic data

Eurozone. According to the results of the primary assessment of the PMI business activity index in April, the indicator increased by 0.3 points and amounted to 53.7. Of the indicators that make up the index, business activity in the service sector was 0.7 points higher, and the state of the manufacturing sector increased by 0.8 points.

US. According to the results of the primary assessment of the PMI business activity index in April, the indicator increased by 2.5 points and amounted to 62.2. Of the indicators that make up the index, business activity in the service sector was 2.7 points higher, and the state of the manufacturing sector increased by 1.5 points.

The number of initial jobless claims for the week was registered in the amount of 574 thousand, which is 39 thousand less than the week before and 70 thousand less than predicted by analysts.



Key events this week

- On Monday, the US is to publish data on orders of durable goods for March.
- On Wednesday, the US will report on changes in oil reserves for the week, and the Fed will publish its decision on the key rate.
- On Thursday, the US will publish data on the number of initial jobless claims for the week, as well as GDP growth in the first quarter.
- On Friday, the Eurozone will know the GDP growth for the first quarter, the level of inflation for March, as well as the unemployment rate in March, while the US will know the level of income and expenses of Americans for March.



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