



## WEEKLY FINANCIAL MARKET OVERVIEW

period 16.11.2020.-22.11.2020.

Financial Markets	Price	5D,%	1M,%	YTD,%	1YR,%
S&P 500 INDEX	3 557.54	-0.77	2.66	10.11	14.38
DOW JONES INDUS. AVG	29 263.48	-0.73	3.27	2.54	4.98
STOXX Europe 600 Index	389.61	1.15	7.48	-6.31	-3.56
DAX INDEX	13 137.25	0.46	3.89	-0.84	-0.20
RTS Index	1 548.92	2.84	8.47	-18.48	-13.24
SHANGHAI SE COMPOSITE	3 377.73	2.00	4.15	11.93	18.32
NIKKEI 225	25 527.37	0.56	8.55	7.91	10.45
MSCI WORLD	2 540.02	-0.84	4.50	7.70	11.70
European Renewable Energy Index	2 356.69	4.92	17.07	64.29	77.23
Chicago Board Options Exchange Volatility Index (VIX)	23.70	2.60	-13.97	71.99	92.06

Commodities	Price	5D,%	1M,%	YTD,%	1YR,%
GOLD Futures	1 872.40	-0.75	-1.49	23.02	28.02
SILVER Futures	24.36	-1.82	-1.32	35.87	43.24
LME COPPER 3MO (\$)	7 093.00	4.22	5.49	17.87	23.87
LME NICKEL 3MO (\$)	15 834.00	1.63	0.80	15.16	12.47
Brent	44.96	3.49	8.57	-31.29	-28.46
WTI	42.42	3.39	7.25	-30.00	-26.02

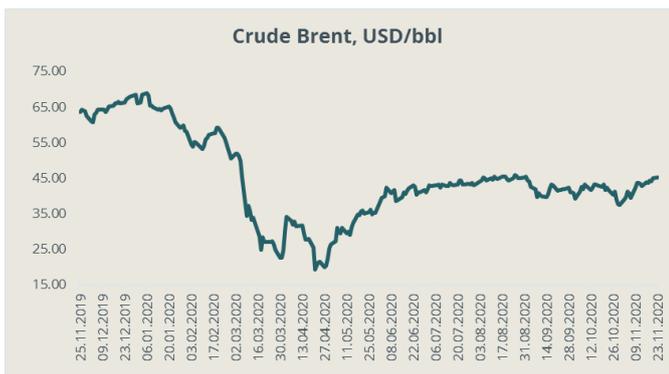
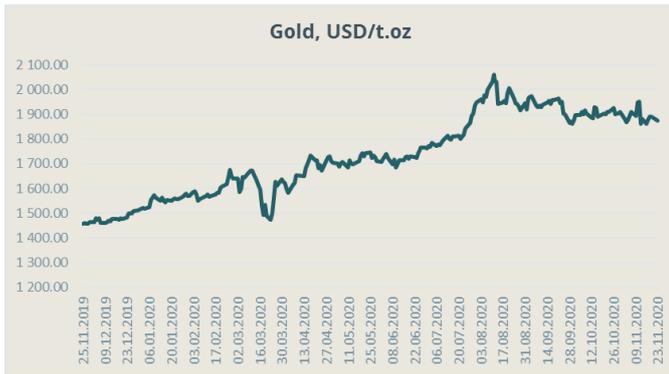
Currencies	Price	5D,%	1M,%	YTD,%	1YR,%
EUR/USD	1.19	0.27	0.12	5.74	7.89
USD/JPY	103.86	0.76	0.93	4.66	5.02
GBP/USD	1.33	0.92	2.15	0.42	3.34

Money Market	Price	5D,%	1M,%	YTD,%	1YR,%
LIBOR USD 3M	0.20	-7.71	-5.04	-89.26	-89.21
LIBOR EUR 3M	-0.54	-0.98	-2.01	-31.28	-21.40
EURIBOR 3M	-0.53	-2.72	-4.14	-37.86	-30.05
EUR SWAP (EONIA) 3M	-0.48	-0.35	-0.58	-9.01	-5.91

Government Bonds	Yield	5D,%	1M,%	YTD,%	1YR,%
US Government Bonds 10 YR (USD)	0.82	-8.03	4.91	-57.01	-52.76
German Government Bonds 10 YR (EUR)	-0.58	-6.58	3.80	-215.14	-68.01
UK Government Bonds 10 YR (GBP)	0.30	-10.65	61.50	-63.26	-58.63
Swiss Government Bonds 10 YR (CHF)	-0.50	-3.33	6.42	-5.31	8.15
Japan Government Bonds 10 YR (JPY)	0.01	-50.00	-50.00	140.00	108.70

### Main events of the previous week

The Saudi Arabia hosted the G20 summit online on November 21-22, the main themes of which were the fight against the pandemic, the international economic crisis and climate change. The summit mainly focused on the coronavirus pandemic and measures against the spread of COVID-19. Following the summit, the leaders of the G20 countries adopted a common declaration. The pandemic has exposed countries' vulnerabilities, the statement said. The G20 leaders said they would continue to provide support to developing nations facing the medical, economic and social impact of COVID-19. Countries have mobilized resources to fund the development, production and distribution of safe and effective means of diagnosing and treating coronavirus infection, as well as vaccines against it. The G20 guarantees access to drugs for COVID-19 for all people. The declaration also notes that economic recovery is uneven, including due to an increase in the number of new cases of coronavirus infection in the world and the introduction of restrictions by some countries. The leaders of the G20 countries have pledged to use all available funds to save people's lives, jobs and incomes, support the recovery of the global economy, and increase the stability of the financial system. Countries, in particular, plan to extend the possibility of suspension of debt repayment for the poorest states until June 2021. By November, 46 countries had asked for a debt freeze.



## Economic data

**US.** Retail sales rose 0.3% in October versus September, while retail sales were expected to grow at 0.5%. In turn, excluding data on gasoline and car sales from the indicator, retail sales in October rose by 0.2%.

The number of initial jobless claims for the week was registered in the amount of 742 thousand, which is 31 thousand more than week before and 35 thousand more than analysts predicted.

**Eurozone.** Consumer price index in October increased 0.2% against September, while the annual inflation was negative and amounted to -0.3%. The growth of the core inflation rate excluding food and energy in October amounted to 0.2% y/y.

**China.** Industrial production in October increased by 6.9% compared to October 2019. At the same time, the growth in industrial production by 0.4 percentage points exceeded expectations.

October retail sales rose 4.3% y/y, while retail sales were expected to grow by 4.9%.

The unemployment rate in October decreased by 0.1 percentage points compared to September and amounted to 5.3%.

## Key events this week

- On Monday, the Eurozone and the US will publish primary data on business activity in November.
- On Wednesday, in the US the data will become known on sales of durable goods for October, GDP growth in the third quarter, the number of initial jobless claims for the week, personal income and expenses of Americans in October, as well as changes in oil inventories for the week.

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