

U.S.	Europe	Japan	APEJ
U.S. stock indices fell over the week ¹ . Estée Lauder's share price fell by 21.8% to US\$67.23 from US\$85.92 amid news of merger negotiations between the company and Spanish beauty group Puig. Meta's share price fell by 11.4% to US\$525.72 from US\$593.66 amid losses in two high-profile court cases.	European stock indices (except Germany's) rose over the week. AstraZeneca's share price rose by 3.1% to £143.32 from £138.96 after the company revealed that its experimental lung disease medicine met its target in two late-stage clinical trials. However, Porsche's share price fell by 1.5% to €30.97 from €31.45.	Japan stock indices rose over the week. Tokio Marine's share price rose by 24.5% to ¥7,511 from ¥6,032 amid news that Berkshire Hathaway has agreed to invest US\$1.8B in the company. SoftBank's share price rose by 10.9% to ¥3,946 from ¥3,558 after its unit Arm Holdings unveiled a plan to sell its own computer chips.	APEJ stock indices (except Australia's) fell over the week. Pop Mart's share price fell by 28.6% to HK\$149.60 from HK\$209.60 amid worries over sustainability of Labubu sales. However, Woodside Energy's share price rose by 1.3% to AUD34.47 from AUD34.04 as Brent crude hovered above US\$101, supporting local energy stocks.

Source: CNBC, Financial Times, Morningstar, Reuters

Key Economic Indicators

United States

- Crude Oil Inventories (excl. SPR²) rose by 6.926M in the week ended 20 Mar, up from an increase of 6.156M in the prev. week
- Initial Jobless Claims (seasonally adj.) rose to 210,000 in the week ended 21 Mar, up from 205,000 in the prev. week
- Manufacturing PMI (seasonally adj.) rose to 52.4 in Mar, up from 51.6 in Feb
- Services PMI (seasonally adj.) fell to 51.1 in Mar, down from 51.7 in Feb

Eurozone/UK

- Eurozone Manufacturing PMI (seasonally adj.) rose to 51.4 in Mar, up from 50.8 in Feb
- Eurozone Services PMI (seasonally adj.) fell to 50.1 in Mar, down from 51.9 in Feb
- French Manufacturing PMI (seasonally adj.) rose to 50.2 in Mar, up from 50.1 in Feb
- French Services PMI (seasonally adj.) fell to 48.3 in Mar, down from 49.6 in Feb
- German Manufacturing PMI (seasonally adj.) rose to 51.7 in Mar, up from 50.9 in Feb
- German Services PMI (seasonally adj.) fell to 51.2 in Mar, down from 53.5 in Feb
- U.K. Manufacturing PMI (seasonally adj.) fell to 51.4 in Mar, down from 51.7 in Feb
- U.K. Services PMI (seasonally adj.) fell to 51.2 in Mar, down from 53.9 in Feb
- U.K. CPI rose by 3.0% yoy in Feb, relatively unchanged from an increase of 3.0% yoy in Jan
- U.K. Retail Sales (chained vol.; non-seasonally adj.) rose by 2.4% yoy in Feb, down from an increase of 5.3% yoy in Jan

Japan

- National Core CPI rose by 1.6% yoy in Feb, down from an increase of 2.0% yoy in Jan
- Manufacturing PMI (seasonally adj.) fell to 51.4 in Mar, down from 53.0 in Feb

Asia Pacific ex Japan (APEJ)

- Australian Manufacturing PMI (seasonally adj.) fell to 50.1 in Mar, down from 51.0 in Feb
- Australian Services PMI (seasonally adj.) fell to 46.6 in Mar, down from 52.8 in Feb
- Hong Kong Trade Deficit rose to HK\$64.2B in Feb, up from HK\$14.1B in Jan
- Indian Manufacturing PMI (seasonally adj.) fell to 53.8 in Mar, down from 56.9 in Feb
- Indian Services PMI (seasonally adj.) fell to 57.2 in Mar, down from 58.1 in Feb
- South Korean PPI rose by 2.4% yoy in Feb, up from an increase of 1.9% yoy in Jan
- Singaporean CPI rose by 1.2% yoy in Feb, down from an increase of 1.4% yoy in Jan

¹ Changes in stock indices & share prices based on Friday of the previous week to Friday of the summary week.

² "SPR" refers to Strategic Petroleum Reserves, the U.S.'s supply of emergency crude oil.

FPA Global Weekly Market Summary

30 March 2026

- Singaporean Industrial Production fell by 0.1% yoy in Feb, vs an increase of 12.9% yoy in Jan
- Taiwanese Industrial Production rose by 17.83% yoy in Feb, down from an increase of 27.88% yoy in Jan
- Taiwanese Unemployment Rate (seasonally adj.) fell to 3.33% in Feb, down from 3.36% in Jan

Source: Bloomberg Economic Calendar, various government sites

Indices	Weekly closing		Weekly change		Monthly change	
	27.03.26	20.03.26	Absolute	%	Absolute	%
US						
DJIA	45,166.64	45,577.47	-410.83	-0.90%	-3,811.28	-7.78%
S&P 500	6,368.85	6,506.48	-137.63	-2.12%	-510.03	-7.41%
NASDAQ	20,948.36	21,647.61	-699.25	-3.23%	-1,719.85	-7.59%
Europe						
FTSE 100	9,967.35	9,918.33	49.02	0.49%	-943.20	-8.64%
EURO STOXX 50	5,505.80	5,501.28	4.52	0.08%	-632.61	-10.31%
DAX	22,300.75	22,380.19	-79.44	-0.35%	-2,983.51	-11.80%
CAC 40	7,701.95	7,665.62	36.33	0.47%	-878.80	-10.24%
FTSE MIB	43,379.10	42,840.90	538.20	1.26%	-3,830.79	-8.11%
Japan						
TOPIX	3,649.69	3,609.40	40.29	1.12%	-288.99	-7.34%
NIKKEI 225	53,373.07	53,372.53	0.54	0.00%	-5,477.20	-9.31%
APEJ						
Shanghai Com	3,913.72	3,957.05	-43.33	-1.10%	-249.16	-5.99%
HANG SENG	24,951.88	25,277.32	-325.44	-1.29%	-1,678.66	-6.30%
HSCEI	8,453.77	8,574.07	-120.30	-1.40%	-405.72	-4.58%
TAIEX	33,112.59	33,543.88	-431.29	-1.29%	-2,301.90	-6.50%
KOSPI	5,438.87	5,781.20	-342.33	-5.92%	-805.26	-12.90%
STI	4,898.18	4,948.87	-50.69	-1.02%	-96.89	-1.94%
FTSEKLCI	1,712.65	1,720.71	-8.06	-0.47%	-3.96	-0.23%
SENSEX	73,583.22	74,532.96	-949.74	-1.27%	-7,703.97	-9.48%
All Ordinaries	8,712.8	8,628.3	84.5	0.98%	-722.8	-7.66%
Commodities						
Brent crude oil	105.32	106.41	-1.09	-1.02%	32.84	45.31%
WTI crude oil	99.64	98.32	1.32	1.34%	32.62	48.67%
Gold	4,524.30	4,609.60	-85.30	-1.85%	-723.60	-13.79%
Bonds						
US 10Y Treasury Yield	4.44%	4.39%	0.05%	1.16%	0.49%	12.30%

Source: MarketWatch, Investing.com

USD exchange rates	27.03.26	SGD exchange rates	27.03.26
GBPUSD	1.335	GBPSGD	1.713
EURUSD	1.155	EURSGD	1.482
AUDUSD	0.692	AUDSGD	0.888
USDSGD	1.284	SGDJPY	124.267
USDJPY	159.557	SGDMYR	3.106
USDMYR	3.988	SGDHKD	6.092
USDHKD	7.822	SGDTHB	25.580
USDTHB	32.844	SGDCNY	5.378
USDCNY	6.905		

Source: Oanda

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