

MARKETS OVERVIEW

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Bond Markets

	in %	in bps			
	24/07/2026	1-Week	1-Month	Year to date	1-Year
Bund 2Y	2.82	+10.0	+26.8	+73.1	+91.4
Bund 5Y	2.91	+9.8	+29.7	+44.7	+69.0
Bund 10Y	3.15	+7.2	+27.4	+28.3	+49.0
OAT 10Y	3.88	+12.2	+37.4	+38.5	+51.9
BTP 10Y	3.96	+13.5	+35.9	+46.5	+40.9
BONO 10Y	3.59	+7.5	+30.0	+34.6	+35.4
Treasuries 2Y	4.33	+5.4	+18.7	+84.9	+38.8
Treasuries 5Y	4.44	+6.5	+25.2	+71.0	+47.3
Treasuries 10Y	4.68	-1.2	+28.1	+51.7	+3.2
Gilt 2Y	4.43	+6.1	+30.1	+67.6	+55.8
Treasuries 5Y	4.60	+7.4	+34.5	+75.3	+56.4
Gilt 10Y	5.11	-3.9	+42.3	+47.6	+17.2

Currencies & Commodities

	Level	Change, %			
	24/07/2026	1-Week	1-Month	Year to date	1-Year
EUR/USD	1.14	-0.2	+0.3	-3.1	-3.3
GBP/USD	1.33	-0.4	+1.4	-0.9	-1.6
USD/JPY	163.75	+0.8	+1.2	+4.5	+11.5
DXY	101.47	+0.2	-0.1	+3.2	+1.2
EUR/GBP	0.85	+0.1	-1.0	-2.2	-1.7
EUR/CHF	0.93	+0.4	+0.8	-0.0	-0.6
EUR/JPY	186.33	+0.6	+1.5	+1.2	+7.9
Oil, Brent (\$/bbl)	96.86	+16.3	+31.2	+59.2	+39.9
Gold (\$/ounce)	4076	+1.5	+1.9	-5.8	+20.9

Equity Indices

	Level	Change, %			
	24/07/2026	1-Week	1-Month	Year to date	1-Year
World					
MSCI World (\$)	4789	-1.0	+0.9	+8.1	+16.1
North America					
S&P500	7412	-1.4	+0.7	+8.3	+16.5
Dow Jones	51947	-1.1	+0.2	+8.1	+16.2
Nasdaq composite	24976	-3.5	-2.0	+7.5	+18.6
Europe					
CAC 40	8372	+0.1	-0.2	+2.7	+7.1
DAX 30	25099	-0.1	+1.4	+2.5	+3.3
EuroStoxx50	6281	+0.2	+1.1	+8.5	+17.3
FTSE100	10736	+2.3	+2.6	+8.1	+17.5
Asia					
MSCI, loc.	1929	+0.0	+0.7	+14.2	+25.3
Nikkei 225	64611	-3.9	-6.6	+28.4	+54.5
Emerging					
MSCI Emerging (\$)	1628	-1.3	-5.9	+15.8	+28.5
China	73	+0.9	+2.6	-12.1	-10.0
India	925	-2.6	-2.9	-12.7	-12.6
Brazil	1854	+1.2	+6.3	+12.6	+32.6

Performance by sector

Eurostoxx600

Year 2026 to 24-7, €

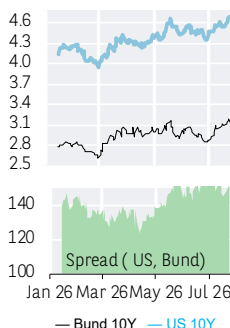
+31.6%	Oil & Gas
+17.3%	Banks
+16.9%	Commodities
+16.7%	Technology
+15.5%	Utilities
+13.1%	Chemical
+9.1%	Industry
+8.8%	Eurostoxx600
+7.5%	Telecoms
+6.7%	Financial services
+6.6%	Insurance
+4.9%	Food industry
+2.7%	Real Estate
+0.7%	Health
+0.1%	Retail
-1.9%	Travel & leisure
-2.8%	Construction
-5.8%	Media
-9.0%	Consumption Goods

S&P500

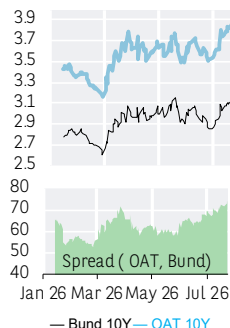
Year 2026 to 24-7, \$

+33.6%	Semiconductors
+33.0%	Energy
+33.0%	Tech. Hardware & Equip.
+21.4%	Capital Goods
+12.1%	Food, Beverage & Tobacco
+11.1%	Materials
+10.8%	Pharmaceuticals
+9.4%	Bank
+8.4%	Utilities
+8.3%	S&P500
+6.6%	Insurance
+4.3%	Retail
-0.7%	Consumer Discretionary
-2.6%	Telecoms
-4.4%	Media
-4.6%	Healthcare
-4.8%	Consumer Services
-6.2%	Commercial & Pro. Services
-27.1%	Automobiles
-30.4%	Real Estate

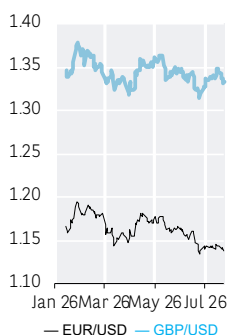
Bund 10Y & US Treas. 10Y



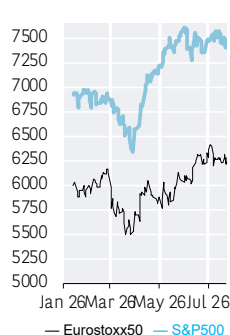
Bund 10Y & OAT 10Y



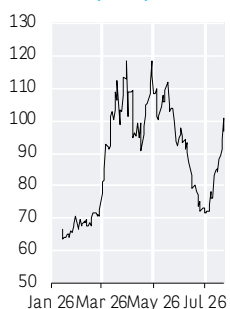
EUR/USD & GBP/USD



EUROSTOXX 50 & S&P500



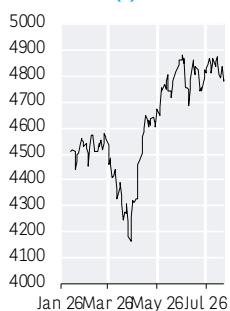
Oil, Brent (\$/bbl)



Gold (\$/ounce)



MSCI World (\$)



MSCI Emerging (\$)



SOURCE: LSEG, BLOOMBERG, BNP PARIBAS
DATA VISUALISATION AND CARTOGRAPHY: TARIK RHARRAB



BNP PARIBAS

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