

MARKETS OVERVIEW

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Bond Markets

	In %	In bps			
	13/06/2025	1-Week	1-Month	Year to date	1-Year
Bund 2Y	1.86	-1.0	-6.1	-20.1	-120.8
Bund 5Y	2.10	-2.4	-10.2	-1.6	-41.0
Bund 10Y	2.54	-2.6	-14.0	+17.3	+6.4
OAT 10Y	3.25	+1.4	-8.7	+12.6	+6.5
BTP 10Y	3.49	-2.0	-22.2	+6.9	-43.0
BONO 10Y	3.16	+1.4	-13.6	+14.2	-17.1
Treasuries 2Y	3.98	-9.2	-5.3	-27.6	-74.8
Treasuries 5Y	4.01	-11.1	-10.0	-37.0	-24.6
Treasuries 10Y	4.40	-9.6	-7.4	-17.1	+16.2
Gilt 2Y	3.95	-7.1	-3.3	-19.6	-79.0
Treasuries 5Y	4.07	-8.7	-6.5	-27.6	+10.4
Gilt 10Y	4.55	-8.9	-12.0	-2.0	+42.8

Currencies & Commodities

	Level	Change, %			
	13/06/2025	1-Week	1-Month	Year to date	1-Year
EUR/USD	1.15	+1.4	+3.4	+11.5	+7.2
GBP/USD	1.36	+0.4	+2.4	+8.4	+6.3
USD/JPY	144.14	-0.5	-2.5	-8.3	-8.1
DXY	111.99	+7.9	+11.5	+10.5	+6.1
EUR/GBP	0.85	+1.0	+1.0	+2.8	+0.8
EUR/CHF	0.94	-0.0	-0.2	-0.1	-2.7
EUR/JPY	166.39	+0.8	+0.8	+2.2	-1.6
Oil, Brent (\$/bbl)	74.40	+11.8	+11.6	-0.5	-9.9
Gold (\$/ounce)	3426	+3.1	+5.6	+30.5	+48.3

Equity Indices

	Level	Change, %			
	13/06/2025	1-Week	1-Month	Year to date	1-Year
World					
MSCI World (\$)	3901	-0.4	+2.0	+5.2	+11.3
North America					
S&P500	5977	-0.4	+1.5	+1.6	+10.0
Dow Jones	42198	-1.3	+0.1	-0.8	+9.2
Nasdaq composite	19407	-0.6	+2.1	+0.5	+9.8
Europe					
CAC 40	7685	-1.5	-2.4	+4.1	-0.3
DAX 30	23516	-3.2	-0.5	+18.1	+28.7
EuroStoxx50	5290	-2.6	-2.3	+8.1	+7.2
FTSE100	8851	+0.1	+2.9	+8.3	+8.4
Asia					
MSCI, loc.	1444	-0.3	+0.4	+0.8	+3.9
Nikkei	37834	+0.2	-0.9	-5.2	-2.3
Emerging					
MSCI Emerging (\$)	1190	+0.6	+2.9	+10.5	+10.6
China	74	+0.3	+0.8	+15.1	+25.2
India	1047	-1.6	+0.6	+1.8	-0.1
Brazil	1417	+1.7	-1.3	+20.4	+1.7

Performance by sector

Eurostoxx600

Year 2025 to 13-6, €

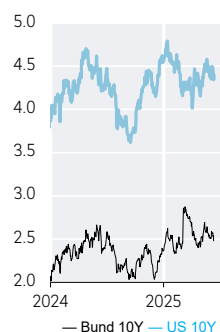
+27.3%	Banks
+17.2%	Utilities
+15.0%	Insurance
+13.2%	Construction
+13.0%	Industry
+10.8%	Telecoms
+9.4%	Oil & Gas
+8.5%	Food industry
+7.4%	Eurostoxx600
+6.0%	Chemical
+3.8%	Real Estate
+3.1%	Technology
+1.7%	Financial services
-0.4%	Retail
-0.9%	Health
-2.7%	Media
-8.1%	Consumption Goods
-8.1%	Commodities
-8.1%	Travel & leisure

S&P500

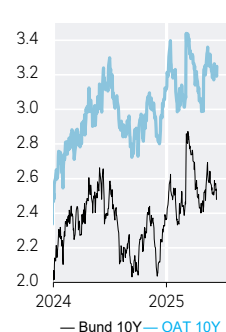
Year 2025 to 13-6, \$

+12.6%	Telecoms
+10.1%	Capital Goods
+9.0%	Food, Beverage & Tobacco
+8.1%	Commercial & Pro. Services
+6.8%	Utilities
+6.5%	Real Estate
+6.3%	Semiconductors
+4.9%	Media
+4.9%	Retail
+4.0%	Insurance
+3.8%	Materials
+3.5%	Bank
+2.2%	Energy
+1.6%	S&P500
+1.0%	Consumer Services
-1.0%	Healthcare
-1.7%	Pharmaceuticals
-3.5%	Consumer Discretionary
-16.8%	Tech. Hardware & Equip.
-17.5%	Automobiles

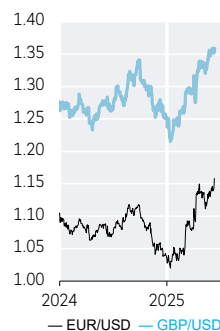
Bund 10Y vs US Treas. 10Y



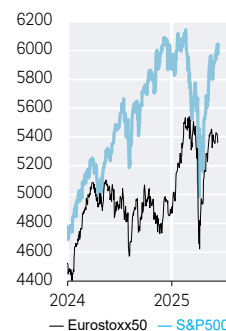
Bund 10Y vs OAT 10Y



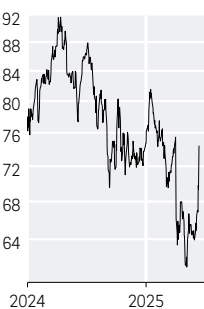
EUR/USD vs GBP/USD



EUROSTOXX 50 vs S&P500



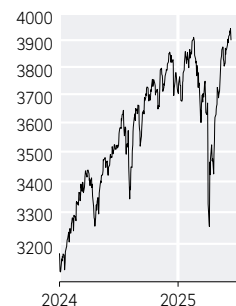
Oil, Brent (\$/bbl)



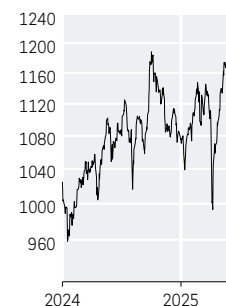
Gold (\$/ounce)



MSCI World (\$)



MSCI Emerging (\$)



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



BNP PARIBAS

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world