

MORNING CALL

SK securities



2022-03-24, (목)

Global Indices

	Close	시가총액	1D	1W	1M	3M	YTD	3Y
KOSPI	2,735.1	2,072,817.0	0.9%	2.9%	-0.3%	-8.1%	-8.1%	25.1%
KOSDAQ	930.6	406,207.1	0.6%	4.3%	5.2%	-6.6%	-10.0%	25.1%
Dow Jones	34,358.5	11,195.6	-1.3%	0.9%	0.8%	-3.2%	-5.4%	34.7%
Nasdaq	13,922.6	24,012.8	-1.3%	3.6%	2.8%	-9.2%	-11.0%	82.2%
S&P 500	4,456.2	39,736.7	-1.2%	2.3%	2.5%	-4.2%	-6.5%	59.1%
UK	7,460.6	2,091.0	-0.2%	2.3%	-0.3%	2.2%	1.0%	3.5%
Germany	14,283.7	1,515.3	-1.3%	-1.1%	-3.0%	-7.5%	-10.1%	25.7%
France	6,581.4	2,134.5	-1.2%	-0.1%	-3.0%	-5.5%	-8.0%	24.9%
Japan	28,040.2	476,542.6	3.0%	8.8%	4.2%	-1.7%	-2.6%	29.7%
China	3,271.0	43,548.4	0.3%	3.2%	-6.3%	-9.8%	-10.1%	5.4%
Brazil	117,457.3	3,831.3	0.2%	5.7%	5.1%	11.3%	12.1%	25.3%
Vietnam	1,502.3	5,943,026.3	-0.1%	2.9%	-0.6%	1.6%	0.3%	51.9%
India	57,684.8	115,277.4	-0.5%	1.5%	0.0%	2.4%	-1.0%	51.1%
Russia	2,470.5	35,750.0	0.0%	0.0%	-18.7%	-33.1%	-34.8%	-0.9%

Global Market

미국 증시 - 유가 재급등 영향으로 인플레이션 우려 부각되며 하락

- 러시아 폭풍 피해로 공급 차질 우려 및 예정된 NATO/G7/EU 회의에서 제재 추가 가능성도 작용
- 다우존스 지수 -1.29%, S&P 500 지수 -1.23%, 나스닥 -1.32%

유럽 증시 - 경기 둔화 및 인플레이션 우려에 하락

- OECD와 영국 정부, 글로벌 IB들의 잇따른 성장률 하락 및 물가 상승 전망들도 우려를 키움
- STOXX 600 -1.01%, 독일 DAX -1.31%, 프랑스 CAC40 -1.17%, 영국 FTSE100 -0.22%

중국 증시 - 정부 정책 수혜 업종 중심으로 상승

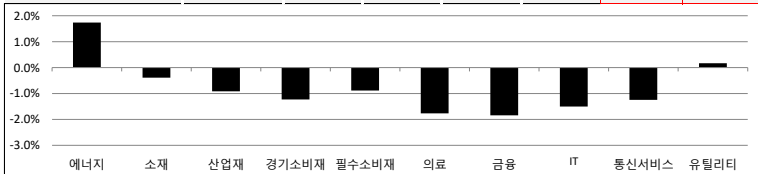
- 중국 정부의 육성과 안정 방침 강조된 수소, 부동산 섹터가 강세를 보이며 지수 상승 견인
- 상하이종합지수 +0.34%, 선전성분지수 +0.73%, 창업판지수 +1.03%

국내 증시 - 기관과 외국인 매수세에 상승

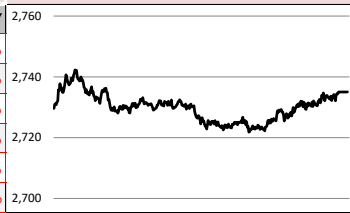
- 업종별로는 러시아 공격으로 인한 유럽 최대 철강공장 피해 소식에 철강/금속 업종 4.23% 상승
- 수급별로 기관과 외국인이 2,356억원, 598억원어치 순매수, 개인이 3,013억원어치 순매도

S&P 500 Sector

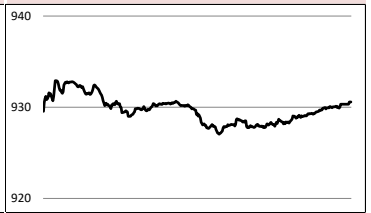
	1D	1W	1M	3M	YTD	2Y	3Y
에너지	1.7%	8.7%	14.1%	41.3%	38.9%	224.4%	21.1%
소재	-0.4%	3.6%	3.4%	-0.2%	-4.4%	125.3%	60.0%
산업재	-0.9%	1.5%	4.2%	-0.1%	-3.3%	110.1%	40.8%
경기소비재	-1.2%	4.5%	1.8%	-7.3%	-10.4%	102.2%	63.1%
필수소비재	-0.9%	0.7%	-2.7%	-1.0%	-4.0%	54.1%	35.2%
의료	-1.8%	0.4%	5.3%	-2.3%	-4.9%	79.5%	49.0%
금융	-1.8%	1.1%	-1.0%	0.7%	-0.9%	119.5%	53.0%
IT	-1.5%	2.6%	1.7%	-9.0%	-11.1%	119.1%	111.0%
통신서비스	-1.2%	2.5%	1.6%	-12.5%	-13.1%	68.8%	46.7%
유틸리티	0.2%	0.5%	7.7%	2.2%	-0.8%	58.5%	21.7%



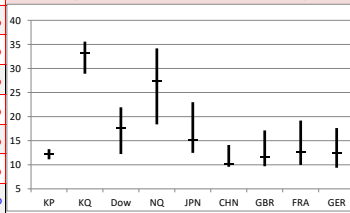
KOSPI



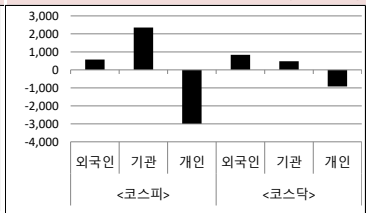
KOSDAQ



Global P/E Ratio



투자자별 순매수대금



Today's Event

- NATO 특별 정상회의 개최 예정
- EU 정상회의 개최 예정
- 미) 크리스토퍼 월러 연준 이사 연설
- 미) 찰스 에반스 시카고 연은 총재 연설
- 미) 라파엘 보스틱 애틀랜타 연은 총재 연설
- 미) 2월 내구재주문
- 유로존) 유럽중앙은행(ECB) 경제보고서
- 일본은행(BOJ) 금융정책결정회의 의사록
- 세아메카닉스 신규상장 예정
- 파세코 추가상장(무상증자)
- 폴라리스웍스 추가상장(CB전환)
- 도이치모터스 추가상장(CB전환)
- 머

MORNING CALL



2022-03-24. (목)

코스피 & 코스닥 섹터별 시가총액 상위 종목 수익률(국내)

(단위 : 억원 / 원)

섹터	코드	종목명	시가총액	Close	1D	1W	YTD	코드	종목명	시가총액	Close	1D	1W	YTD
에너지 Energy	A096770	SK이노베이션	194,640	210,500	-0.9%	5.8%	-11.7%	A009830	한화솔루션	68,956	36,050	1.6%	4.5%	1.6%
	A010950	S-Oil	100,649	89,400	0.0%	5.2%	4.3%	A002380	KCC	29,636	333,500	2.0%	2.3%	5.9%
	A078930	GS	37,631	40,500	0.9%	1.5%	3.6%	A011780	금호석유	49,231	162,500	0.6%	3.5%	-2.1%
	A018670	SK가스	10,292	111,500	0.5%	1.4%	-12.6%	A047050	포스코인터내셔널	27,266	22,100	0.0%	3.8%	-1.6%
	A002960	한국셀석유	3,315	255,000	1.2%	2.0%	-1.0%	A010060	OCI	26,234	110,000	-1.4%	2.3%	5.8%
	A017940	E1	3,245	47,300	0.9%	3.4%	-1.9%	A011790	SKC	53,773	142,000	0.7%	10.1%	-18.6%
소재 Materials	A051910	LG화학	358,609	508,000	3.3%	14.9%	-17.4%	A036490	SK머티리얼즈	0	0	0.0%	0.0%	0.0%
	A005490	POSCO홀딩스	267,228	306,500	4.6%	8.3%	11.7%	A036830	솔브레인홀딩스	6,101	29,100	0.7%	3.7%	-15.9%
	A010130	고려아연	110,956	588,000	2.3%	2.8%	15.1%	A178920	PI첨단소재	13,185	44,900	1.2%	3.0%	-18.5%
	A011170	롯데케미칼	70,950	207,000	1.2%	0.7%	-4.6%	A005290	동진세미켐	19,846	38,600	2.4%	19.9%	-24.3%
	A004020	현대제철	57,182	42,850	6.7%	10.0%	4.5%	A278280	천보	31,410	314,100	1.2%	12.4%	-9.9%
	A003410	쌍용C&E	40,863	8,110	-0.6%	-0.3%	5.2%	A078130	국일제지	4,735	3,710	-1.7%	-1.6%	-8.7%
산업재 Industrials	A028260	삼성물산	213,051	114,000	0.0%	-0.9%	-4.2%	A010140	삼성중공업	50,072	5,690	-0.2%	2.9%	0.4%
	A034730	SK	176,475	238,000	-0.6%	1.5%	-5.2%	A000720	현대건설	54,063	48,550	0.6%	-1.3%	9.2%
	A003550	LG	118,448	75,300	1.2%	3.9%	-6.9%	A004990	롯데지주	33,099	31,550	0.3%	0.3%	5.5%
	A009540	한국조선해양	64,616	91,300	0.6%	1.4%	-3.5%	A047810	한국항공우주	41,914	43,000	0.0%	15.4%	32.5%
	A086280	현대글로비스	69,563	185,500	0.5%	9.4%	10.4%	A012750	에스원	25,801	67,900	-0.2%	0.7%	-8.1%
	A267250	현대중공업지주	42,024	53,200	1.5%	1.5%	-0.9%	A000120	CJ대한통운	30,226	132,500	0.4%	-1.5%	5.2%
자유소비재 Consumer Discretionary	A005380	현대차	376,056	176,000	1.4%	4.8%	-15.8%	A028300	HLB	34,009	31,900	-1.4%	-1.4%	-8.3%
	A012330	현대모비스	201,441	213,000	1.4%	2.4%	-16.3%	A035760	CJ ENM	29,604	135,000	0.0%	3.9%	-2.7%
	A000270	기아	291,051	71,800	0.7%	-0.4%	-12.7%	A034230	파라다이스	14,915	16,400	-0.9%	-3.0%	9.7%
	A066570	LG전자	201,287	123,000	-0.8%	-1.6%	-10.9%	A028150	GS홈쇼핑	0	0	0.0%	0.0%	0.0%
	A035250	강원랜드	58,727	27,450	0.6%	-2.3%	14.1%	A025980	아난티	7,381	8,660	1.2%	4.3%	-17.9%
	A021240	코웨이	49,889	67,600	-0.2%	1.2%	-9.1%	A033290	코웰패션	6,788	7,670	-0.3%	0.1%	-9.2%
필수소비재 Consumer Staples	A051900	LG생활건강	134,629	862,000	-0.5%	2.9%	-21.4%	A282330	BGF리테일	31,111	180,000	0.6%	0.6%	23.7%
	A033780	KT&G	110,520	80,500	0.0%	-1.2%	1.9%	A139480	이마트	39,444	141,500	0.7%	2.5%	-6.3%
	A090430	아모레퍼시픽	91,541	156,500	1.0%	1.0%	-6.3%	A007070	GS리테일	29,635	28,300	-0.2%		

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2022-03-24 (목)

섹터별 시가총액 상위 종목 수익률(해외)

Dow Jones Industrial Average Memembers

Company	국가	Close	1D	1W	1M	YTD
Apple	USA	170.2	0.8%	6.7%	1.7%	-4.1%
American Express	USA	186.0	-2.8%	3.0%	-4.5%	13.7%
Boeing	USA	186.0	-2.6%	-1.6%	-11.0%	-7.6%
Caterpillar	USA	222.2	-0.2%	2.8%	15.7%	7.5%
Cisco Systems	USA	54.5	-3.0%	-2.4%	-4.8%	-14.0%
Chevron	USA	165.9	1.1%	5.2%	24.3%	41.3%
Walt Disney	USA	137.6	-1.8%	-0.4%	-9.1%	-11.1%
Dow Inc	USA	63.3	-0.4%	6.1%	4.5%	-
Walgreens Boots Alliance	USA	46.7	-1.5%	-1.4%	0.3%	-10.4%
Goldman Sachs Group	USA	335.6	-2.2%	-1.5%	-3.0%	-12.3%
Home Depot	USA	317.1	-3.8%	-4.2%	-8.6%	-23.6%
IBM	USA	128.3	-0.6%	1.0%	3.2%	-4.0%
Intel	USA	48.3	-0.2%	3.5%	7.2%	-6.3%
Johnson & Johnson	USA	174.3	-0.4%	-0.1%	6.7%	1.9%
JPMorgan Chase & Co	USA	139.8	-2.0%	1.0%	-8.1%	-11.7%
Coca-Cola	USA	60.4	-0.7%	1.6%	-3.4%	2.0%
McDonald's	USA	236.1	-0.8%	-0.8%	-5.8%	-11.9%
3M	USA	147.7	-1.5%	1.5%	0.0%	-16.9%
Merck & Co	USA	79.7	0.5%	2.1%	4.4%	4.0%
Microsoft	USA	299.5	-1.5%	1.7%	4.0%	-11.0%
NIKE	USA	133.0	-0.1%	6.2%	-7.0%	-20.2%
Pfizer	USA	52.2	-1.6%	-1.4%	7.5%	-11.6%
Procter & Gamble	USA	150.8	-0.7%	0.7%	-5.7%	-7.8%
Travelers	USA	181.6	-0.6%	1.3%	6.4%	16.1%
UnitedHealth Group	USA	503.2	-0.4%	1.0%	7.6%	0.2%
United Technologies	USA	101.2	-0.1%	5.7%	8.4%	17.6%
Visa	USA	214.7	-1.7%	1.3%	-3.6%	-0.9%
Verizon	USA	51.0	-0.1%	-2.9%	-5.3%	-1.9%
Walmart	USA	142.0	-1.3%	-2.3%	2.9%	-1.9%
Exxon Mobil	USA	83.1	1.6%	8.1%	7.5%	35.9%

Materials

Company	국가	Close	1D	1W	1M	YTD
BHP Billiton	AUS	48.4	-0.8%	7.2%	0.4%	16.7%
BASF	DEU	53.2	-2.9%	-3.9%	-16.2%	-13.8%
Rio Tinto	AUS	113.7	-0.1%	6.3%	-5.4%	13.6%
SABIC	SAU	129.6	-0.2%	2.2%	7.1%	11.7%
Glencore	GBR	511.2	1.8%	8.0%	22.3%	36.3%
Vale S.A.	BRA	96.4	-0.2%	5.8%	12.2%	23.6%
Air Liquide S.A.	FRA	154.2	2.3%	2.1%	5.1%	0.6%
Nutrien	CAN	132.5	0.9%	11.2%	37.0%	92.0%
Shin-Etsu Chemical	JAP	19,015.0	3.3%	7.4%	8.6%	-4.5%
LyondellBasell	USA	104.2	-0.4%	3.3%	4.4%	13.0%
Air Products & Chemicals	USA	235.2	-0.5%	4.7%	-2.8%	-22.7%
Southern Copper	USA	77.6	1.3%	10.1%	14.8%	25.7%
Linde PLC	USA	307.3	-1.5%	0.9%	1.5%	-11.3%
Alcoa	USA	94.2	4.8%	24.6%	20.5%	58.1%

Industrials

Company	국가	Close	1D	1W	1M	YTD
Honeywell Int'l	USA	192.3	-1.4%	0.7%	5.6%	-7.8%
Siemens	DEU	129.9	-2.6%	-5.1%	0.8%	-14.9%
Union Pacific	USA	267.7	0.7%	1.3%	6.6%	6.3%
Lockheed Martin	USA	445.3	1.1%	5.7%	15.2%	25.3%
UPS	USA	214.6	-1.8%	-1.5%	2.5%	0.1%
Airbus	FRA	107.2	-0.9%	0.4%	-4.4%	-4.6%
Fedex	USA	221.5	-2.3%	-2.0%	-0.3%	-14.4%
General Dynamics	USA	239.7	0.8%	5.3%	11.1%	15.0%
Raytheon	USA	117.0	0.0%	0.0%	0.0%	0.0%
Northrop Grumman	USA	446.9	0.1%	5.3%	14.2%	15.5%
Vinci	FRA	91.9	-1.7%	-1.3%	-7.5%	-1.1%
Illinois Tool Works	USA	209.4	-1.5%	-0.3%	-3.0%	-15.2%
Deutsche Post	DEU	44.9	-2.8%	-3.9%	-2.1%	-20.6%
Canadian National Railway	CAN	167.6	0.0%	3.8%	5.3%	7.9%

Energy

Company	국가	Close	1D	1W	1M	YTD
Royal Dutch Shell	GBR	1,895.2	0.0%	0.0%	0.0%	16.9%
Petro China	HKG	3.9	-1.5%	8.3%	-4.1%	13.3%
Total	FRA	46.3	0.8%	1.		

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Consumer Staples

Company	국가	Close	1D	1W	1M	YTD
Nestle	CHE	118.7	-1.6%	1.9%	0.0%	-6.9%
AB Inbev	BEL	53.4	-2.0%	-1.2%	-1.9%	0.3%
Unilever	NLD	40.6	-1.8%	0.1%	-12.0%	-13.7%
Pepsico	USA	163.5	-0.5%	2.4%	-2.5%	-5.9%
Philip Morris	USA	91.3	-2.6%	-2.7%	-18.2%	-3.9%
Kweichow Moutai	CHN	1,752.2	3.4%	4.6%	-6.6%	-14.5%
BAT	GBR	3,191.0	-0.3%	3.4%	-5.2%	16.7%
L'oreal	FRA	357.3	-1.7%	-0.8%	3.1%	-14.3%
Altria Group	USA	53.2	-0.2%	3.8%	2.9%	12.3%
AmBev	BRA	14.2	-1.3%	3.0%	-1.8%	-8.0%
Diageo	GBR	3,746.0	0.1%	4.3%	3.0%	-7.2%
Costco Wholesale	USA	554.0	-1.0%	2.0%	8.1%	-2.4%
Kraft Heinz	USA	38.3	0.9%	1.6%	-0.5%	6.6%
CVS Health	USA	106.2	-1.0%	-0.8%	4.0%	2.9%
Mondelez International	USA	60.8	-1.3%	-1.9%	-7.9%	-8.3%

Health Care

Company	국가	Close	1D	1W	1M	YTD
Novartis	CHE	79.9	-0.4%	0.6%	1.4%	-0.5%
Roche Holding	CHE	365.6	-0.3%	2.2%	7.7%	-3.6%
AbbVie	USA	158.4	-1.0%	1.5%	10.0%	17.0%
Amgen	USA	234.2	-1.0%	1.1%	6.1%	4.1%
Novo Nordisk	DNK	747.0	0.7%	5.1%	14.8%	1.6%
Abbott Laboratories	USA	116.9	-4.1%	-2.1%	0.1%	-16.9%
Medtronic	USA	106.2	-2.6%	-1.1%	5.5%	2.6%
Bristol Myers Squibb	USA	71.4	0.8%	2.5%	5.7%	14.5%
Sanofi	FRA	93.6	-0.4%	-0.5%	1.6%	5.7%
Gilead Sciences	USA	58.9	-1.9%	1.5%	-3.6%	-19.0%
Bayer	DEU	58.2	-1.6%	2.4%	13.4%	23.9%
GlaxoSmithKline	GBR	1,612.6	-0.6%	1.9%	3.3%	0.4%
Astrazeneca	GBR	9,730.0	1.6%	3.3%	6.3%	12.1%
Thermo Fisher	USA	571.3	-2.7%	1.6%	6.4%	-14.4%
Eli Lilly & Co.	USA	284.2	-0.3%	2.8%	18.3%	2.9%
Celgene	USA	108.2	0.0%	0.0%	0.0%	0.0%

Information Technology

Company	국가	Close	1D	1W	1M	YTD
Alphabet	USA	2,765.5	-1.1%	3.7%	6.0%	-4.5%
Tencent	HKG	389.0	0.3%	6.0%	-12.7%	-12.3%
Alibaba	USA	117.2	2.0%	11.7%	-1.5%	-1.3%
Facebook	USA	213.5	-1.5%	4.8%	3.5%	-36.5%
Taiwan Semicon	TWN	590.0	1.2%	5.7%	-6.6%	-4.1%
Oracle	USA	80.4	-1.7%	0.5%	7.8%	-7.8%
Nvidia	USA	256.3	-3.4%	4.6%	8.4%	-12.8%
SAP	DEU	99.9	-2.2%	-3.4%	1.4%	-20.0%
Adobe Systems	USA	422.9	-9.3%	-4.4%	-4.4%	-25.4%
Texas Instruments	USA	179.1	-1.8%	1.6%	7.4%	-5.0%
Broadcom	USA	599.4	-2.0%	-1.3%	3.3%	-9.9%
Paypal	USA	114.7	-2.7%	6.2%	10.6%	-39.2%
ASML	NLD	613.9	-2.1%	6.0%	11.5%	-13.1%
Baidu	USA	154.9	0.2%	2.7%	-1.8%	4.1%
Qualcomm	USA	152.9	-3.0%	1.6%	-8.8%	-16.4%
Micron Technology	USA	75.7	-4.4%	-5.0%	-16.7%	-18.8%
Tokyo Electron	JAP	61,740.0	3.8%	11.9%	12.0%	-6.8%
Nintendo	JAP	63,890.0	3.3%	6.8%	8.7%	19.1%
Applied Materials	USA	131.4	-3.0%	0.7%	-1.4%	-16.5%

Telecommunication Services

Company	국가	Close	1D	1W	1M	YTD
AT&T	USA	23.2	0.0%	0.1%	-2.8%	-5.7%
China Mobile	HKG	54.4	0.5%	8.3%	-2.8%	16.1%
NTT Docomo	JAP	3,880.0	0.0%	0.0%	0.0%	0.0%
Nippon Telegraph	JAP	3,655.0	2.2%	4.0%	9.8%	16.0%
Softbank	JAP	5,421.0	7.2%	20.0%	5.1%	-0.2%
Deutsche Telekom	DEU	16.6	-0.7%	-1.5%	1.9%	1.7%
Vodafone	GBR	124.3	-2.2%	-0.1%	-8.6%	10.7%
KDDI	JAP	4,160.0	1.1%	3.8%	9.7%	23.7%
America Movil SAB	MEX	20.7	-0.5%	3.1%	13.5%	-4.4%
T-Mobile	USA	124.8	-0.7%	-2.3%	0.7%	7.6%
Telefonica	ESP	4.2	-1.3%	2.0%	-2.6%	8.8%
Orange	FRA	10.7	0.0%	0.9%	-2.3%	13.6%
Singapore						