

Weekly Economic Report

16 September 2019

The week that was

- The US and China made some positive gestures last week amidst the ongoing trade dispute. China announced a small proportion of US goods would be exempt from tariffs. In return, President Trump said he would postpone the scheduled 5% extra tariff on \$250bn of Chinese imports from 1 Oct to 15 Oct.
- The European Central Bank (ECB) announced a comprehensive policy package to stimulate the eurozone economy. It cut interest rates to a new record low of -0.5% and restarted its Quantitative Easing program. The central bank also announced an array of other unconventional monetary policies.
- Renewed trade optimism and ECB action together pushed equities higher while bond prices continued their sharp retreat. The S&P500 was up 1.0% while Europe (1.2%), Japan (3.7%) and the UK (1.2%) also closed higher. US 10-year bond yields gained a whopping 34bps to 1.9% while German 10-year Bund rose 19bps to -0.45%. Australia experienced less action, with the ASX200 up 0.3% and Australian 10-year bond yields rising 7bps to 1.16%.
- US economic data were solid over the last week. Inflation was at its highest rate since July 2018, with the core CPI growing 2.4% year-on-year. Retail sales grew stronger than expected at 0.4% in August while consumer sentiment also picked up slightly from its previous 3-year low.
- Confidence in the Australian economy dipped last week. Business conditions and confidence both slipped to 1 index point in August, while consumer confidence eased slightly to 98 index points.

Economic calendar

Monday 16/09 Tuesday CH: Monthly retail sales/IP/FAI

Tuesday GE: ZEW survey 17/09

Thursday US: FOMC monetary policy meeting
19/09 JP: BoJ monetary policy meeting

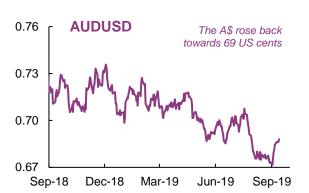
JP: BoJ monetary policy meeting UK: BoE monetary policy meeting

AU: Labour force survey

The week ahead

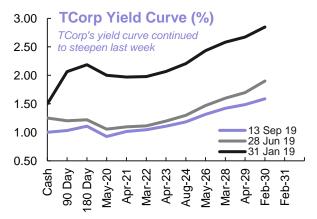
- A trio of central bank policy meetings the BoE, the BoJ and the US Fed Reserve – will keep global investors on their toes later this week. The monthly data download from China on Monday will also be of interest.
- In Australia, the labour force survey on Thursday will be the focus

Financial markets charts









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Financial markets data: Week ending 13 September 2019

| RBA Cash Rate | Interest Rates | Close (%) | 1 Week (bps) | | YTD (bps) | |
|--|---|-----------|--------------|----------|------------------|----------|
| 90-day BBSW 1.03 3 A . 106 V 3-year Australian Bond Yield 0.89 7 A . 96 V 10-year Australian Bond Yield 1.16 7 A . 116 V 20-year Australian Bond Yield 1.155 6 A . 1113 V 10-year Australian Brond Yield 1.19 2 A . 45 V 10-year Australian Brond Yield 1.19 2 A . 45 V 10-year Australian Brond Yield 1.19 2 A . 45 V 10-year Australian Brond Yield 1.19 2 A . 45 V 10-year Australian Brond Yield 1.19 2 A . 45 V 10-year Australian Brond Yield 1.19 2 A . 45 V 10-year US Treasury Yield 1.180 26 A . 69 V 10-year US Treasury Yield 1.190 34 A . 79 V 10-year German Bund Yield 1.190 34 A . 79 V 10-year German Bund Yield 1.100 34 A . 79 V 10-year German Bund Yield 1.101 4 A . 101 V 1.006 B April 2021 1.01 4 A . 101 V 1.008 B April 2021 1.05 6 A . 100 V 1.00% 20 April 2023 1.11 7 A . 107 V 1.00% 20 April 2023 1.11 7 A . 107 V 1.00% 20 May 2026 1.31 4 A . 122 V 1.00% 20 May 2026 1.31 4 A . 122 V 1.00% 20 May 2026 1.31 4 A . 122 V 1.00% 20 May 2027 1.42 5 A . 124 V 1.00% 20 March 2028 1.49 3 A . 125 V 1.00% 20 April 2029 1.59 3 A . 125 V 1.50% 20 August 2020 CIB 1.59 3 A . 125 V 1.50% 20 August 2020 CIB 1.65 3 A . 125 V 1.75% 20 November 2025 CIB 1.75% 20 November 2025 CIB 1.75% 20 November 2025 CIB 1.76 A . 76 V 1.79 A . 100 A . 4 A . 100 A . 4 V 1.79 A . 100 A . 4 A . 100 A . 100 A . 4 A . 100 A . 100 A . 4 A . 100 A | | | | _ | | V |
| 3-year Australian Bond Yield 0.89 7 | 90-day BBSW | | 3 | A | -106 | |
| 20-year Australian Bond Yield | 3-year Australian Bond Yield | 0.89 | 7 | A | -96 | ▼ |
| 10-year Australian Break-Even Inflation 1.19 2 | 10-year Australian Bond Yield | 1.16 | | | -116 | |
| 10-year Australian Real Vield | | | | A | -113 | V |
| Fed Funds Rate (lower bound) 2.00 025 - 2-year US Treasury Yield 1.80 26 | 10-year Australian Break-Even Inflation | | 2 | | -45 | |
| 2-year US Treasury Yield 1.80 10-year US Treasury Yield 1.90 34 | 10-year Australian Real Yield | -0.03 | 5 | A | -71 | ▼ |
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