

HD New Zealand/Australia Morning Call-Global markets

WC 997 words

PD 25 September 2014

ET 05:23

SN Reuters News

SC LBA

LA English

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Stock Markets

S&P/ASX 200	5,375.77	-39.96	NZSX 50	5,258.17	+16.73
DJIA	17,219.63	+163.76			
Nikkei	16,167.45	-38.45			
NASDAQ	4,554.49	+45.80	FTSE	6,706.27	+30.19
S&P 500	1,999.20	+16.43	Hang Seng	23,921.61	+84.54
SPI 200 Fut	5,407.00	+28.00	TRJCRB Index	280.38	+2.58

Bonds AU 10 YR Bond	3.608	+0.003	US 10 YR Bond	2.567	+0.034
NZ 10 YR Bond	4.210	-0.005	US 30 YR Bond	3.281	+0.030

Currencies (Prev at 7pm NZST)

AUD US\$	0.8878	0.8883	NZD US\$	0.8071	0.8084
EUR US\$	1.2783	1.2850	Yen US\$	108.95	108.61

Commodities

Gold (Lon)	1217.25	Silver (Lon)	0.000
Gold (NY)	1222.69	Light Crude	93.20

Overnight market action with latest New York figures.

EQUITIES

NEW YORK - U.S. stocks were near session highs in the latter stages of trading on Wednesday, led by healthcare stocks after the S&P 500 successfully tested a key support level following three sessions of declines.

The Dow Jones industrial average was rising 121.17 points, or 0.71 percent, to 17,177.04, the S&P 500 was gaining 11.45 points, or 0.58 percent, to 1,994.22 and the Nasdaq Composite was adding 36.10 points, or 0.8 percent, to 4,544.79.

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LONDON - Britain's top share index ended higher on Wednesday, with gains from BHP Billiton BLT.L on its plan to list a spin-off **company** also in London and supportive comments from ECB chief Mario Draghi underpinning the market.

The FTSE 100 finished 0.5 percent higher at 6,706.27 points after staying almost flat during most of the session. It gained in the last hour of trading, tracking higher U.S. stocks.

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TOKYO - Japanese shares stepped back on Wednesday, after U.S. air strikes in Syria dampened risk sentiment and curbed the

yen's fall - the main driver of the market's rally in the past several weeks.

Returning on Tuesday from a market holiday, the Nikkei average fell 0.2 percent to 16,167.45, though the fall was limited partly because of buying ahead of Thursday, which is half-year dividend record date for many Japanese shares.

The broader Topix fell 0.3 percent while the new JPX-Nikkei Index 400 dipped 0.3 percent.

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FOREIGN EXCHANGE

NEW YORK - The dollar rose again on Wednesday, wiping out early gains in the yen against the greenback coming after Japanese Prime Minister Shinzo Abe voiced concern about the economic impact of the Japanese currency's fall to a six-year low.

The dollar index gained 0.40 percent and touched highs last seen in July 2010, while the euro sank 0.4 percent to a new 14-month low under \$1.28 and was last at \$1.2788.

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TREASURIES

NEW YORK - U.S. Treasuries yields were little changed on Wednesday on a lack of clarity surrounding Federal Reserve monetary policy, while easing concerns over U.S. strikes in Syria prevented safe-haven bids.

Benchmark U.S. 10-year Treasury notes were last down 1/32 in price to yield 2.54 percent, from a yield of 2.53 percent late Tuesday. U.S. 30-year Treasury **bonds** were last up 1/32 to yield 3.25 percent, roughly unchanged from late Tuesday's level.

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COMMODITIES

GOLD

NEW YORK - **Gold** fell on Wednesday as the dollar climbed to levels not seen in four years and global shares rebounded, while investors remained cautious ahead of U.S. economic data due later in the week.

Spot **gold**, stronger initially, fell to a session low of \$1,215.60 an ounce. It was down 0.5 percent at \$1,216.66 an ounce by 2:07 p.m. EDT (1807 GMT), less than \$10 above an 8-1/2-month low of \$1,208.36 reached in the previous day.

U.S. COMEX **gold** futures for December delivery settled down \$2.50 at \$1,219.50 an ounce, with trading volume in line with its 30-day average, preliminary Reuters data showed.

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BASE METALS

LONDON - Nickel rose on Wednesday as investors saw a recent slide in prices as a buying opportunity ahead of expected shortages, while **copper** recovered after hitting a fresh three-month low as uncertainty about global growth weighed on markets.

Three month nickel on the London Metal Exchange gained 1.61 percent to end at \$17,400 a tonne, after touching \$16,483 on Tuesday, the lowest in more than five months.

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OIL

NEW YORK - Brent crude **oil** futures dropped below \$96 a barrel on Wednesday to a two-year low as rising supply from Africa and Iraq offset mounting tensions in the Middle East and stronger-than-expected growth expectations in **China**.

Brent crude for November delivery was down 70 cents

at \$96.15 a barrel by 12:51 EDT (1651 GMT) after hitting a session low of \$95.60, its lowest since July 2012. It was down more than 6.5 percent for the month so far, the biggest monthly drop since April 2013.

U.S. crude rose by 8 cents to \$91.64 a barrel as the unexpected drawdown in weekly U.S. stocks offset earlier losses that had dragged it down to \$91.12.

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RF Released: 2014-9-24T20:23:45.000Z

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