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EVROSISTEM

ANALITSKO-RAZISKOVALNI CENTER

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KAZALO

1 Surovine in gospodarske velesile 1
ZDA 2

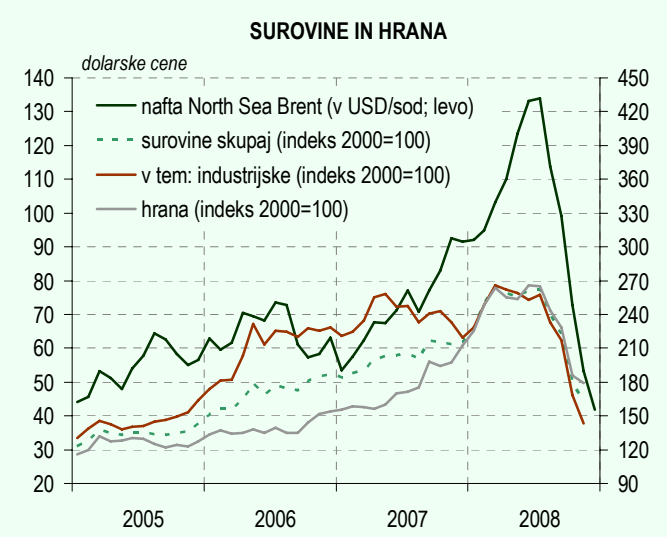
2 Evroobmočje 3
Nemčija 5
Francija 6
Italija 7
Španija 8
Nizozemska 9
Portugalska 10
Grčija 11
Belgija 12
Avstrija 13
Finska 14
Irska 15
Slovenija 16
Luksemburg 17
Malta in Ciper 18

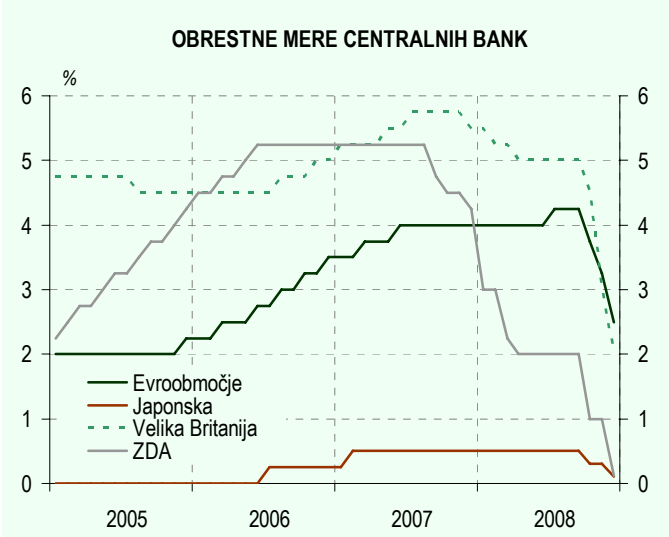
3 Članice EU izven evroobmočja 19
Velika Britanija 20
Danska 21
Švedska 22
Nekatere nove članice EU 23
Madžarska 24
Češka 25
Poljska 26
Slovaška 27
Baltske države 28
Bolgarija in Romunija 29

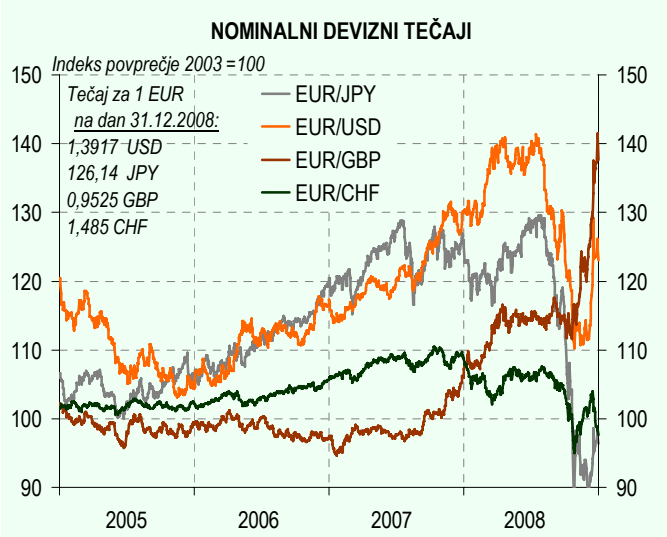
4 Države jugo-vzhodne Evrope 30
Hrvaška 31
Srbija 32
Makedonija 33

5 Ukrepi centralnih bank 34

Surovine in gospodarske velesile





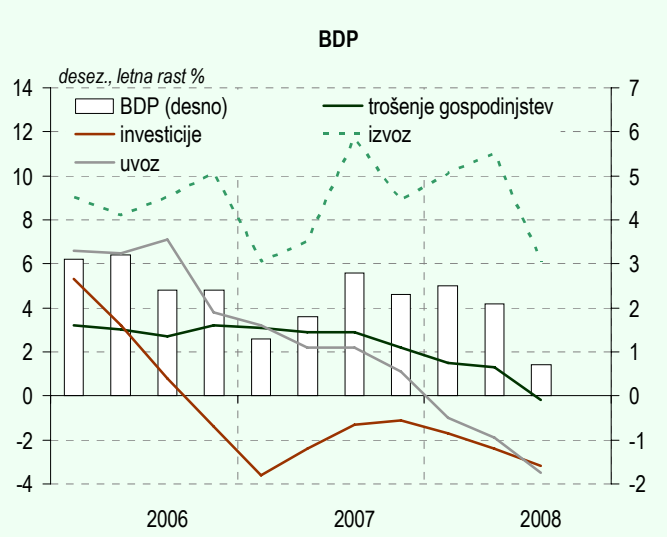


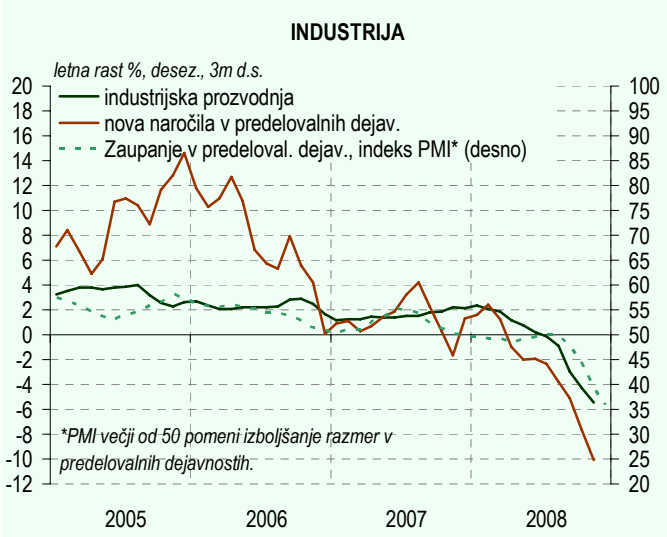
Viri: The Economist (cene surovin), Bloomberg (nafta, borzni indeksi), ECB (obrestna mera, devizni tečaji), Federal Reserve, Reserve Bank of Japan, Bank of England (obrestne mere)

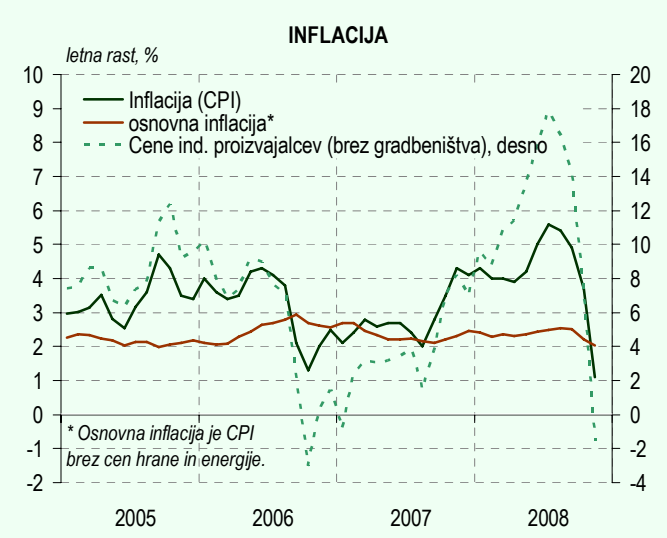
	BDP		*Inflacija*		*Brezposelnost*		*Tekoči račun*		*Saldo javnih financ*	
	2007	*2008*	*2007*	*2008*	*2007*	*2008*	*2007*	*2008*	*2007*	*2008*
SVETOVNO GOSPODARSTVO							*(v % BDP)*		*(v % BDP)*	
ZDA	**2.0**	1.2	**2.9**	4.0	**4.6**	5.7	**-5.2**	-4.6	**-2.8**	-5.9
Evroobmočje	**2.7**	1.0	**2.1**	3.3	**7.5**	7.6	**0.2**	-0.3	**-0.6**	-1.3
Japonska	**2.1**	0.4	**0.0**	1.6	**3.9**	4.1	**4.8**	4.0	**-2.2**	-1.9
Kitajska	**11.9**	9.7	**4.8**	6.4	4.3	4.5	**11.3**	9.7	****2,1**	**2,0
Rusija	**8.1**	6.7	**9.0**	14.0	7.0	6.5	**5.9**	6.5	****6,1**	**5,5
Indija	**9.3**	8.0	**6.4**	7.9	…	…	**-1.2**	-3.2	****-6,1**	**-9,5
Regije po IMF World Economic Outlook										
Svet	**5.0**	3.9								
Afrika	**6.3**	5.9	**6.2**	10.2	…	…	**0.4**	3.0	…	…
Azija	**10.0**	8.4	**5.4**	7.8	…	…	**7.0**	5.4	…	…
Hitro rastoča Azija*	**5.6**	4.0	**2.2**	4.8	3.4	3.3	**6.2**	4.7	…	…
Bližnji Vzhod	**5.9**	6.4	**10.6**	15.8	…	…	**18.4**	22.9	…	…
J-Amerika in oceanija	**5.6**	4.6	**5.4**	7.9	…	…	**0.4**	-0.8	…	…

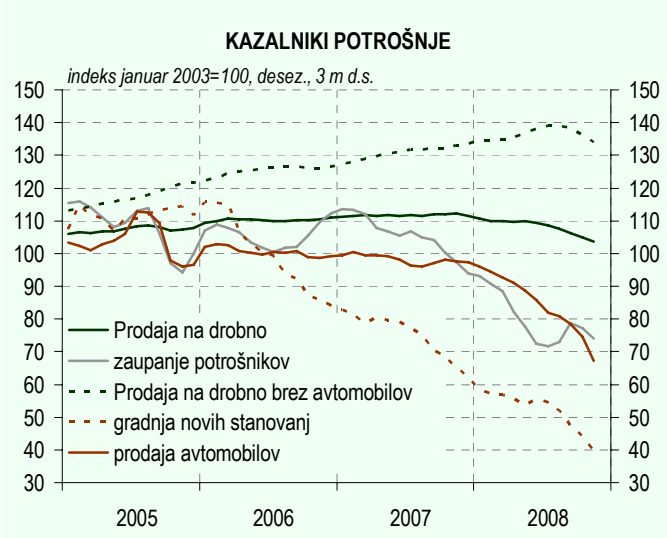
Opombe: Podatki zapisani **odebeljeno sivo** so napovedi.
* Hitro rastoča Azija zajema Hong Kong, Korejo, Singapur in Tajvan. ** Podatki se nanašajo na državni proračun (Central Government).
… ni podatka
Viri: IMF WEO (oktober 2008, april 2008,), Evropska Komisija (november 08'), OECD, BS, UMAR, statistični uradi, Consensus (december 2008)

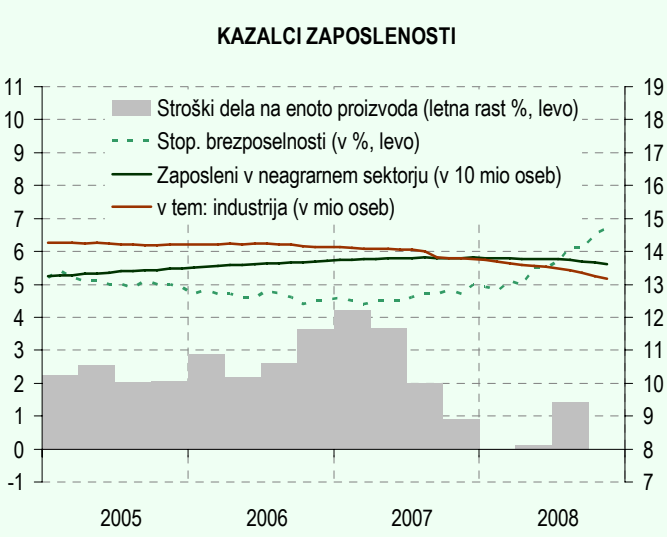
ZDA

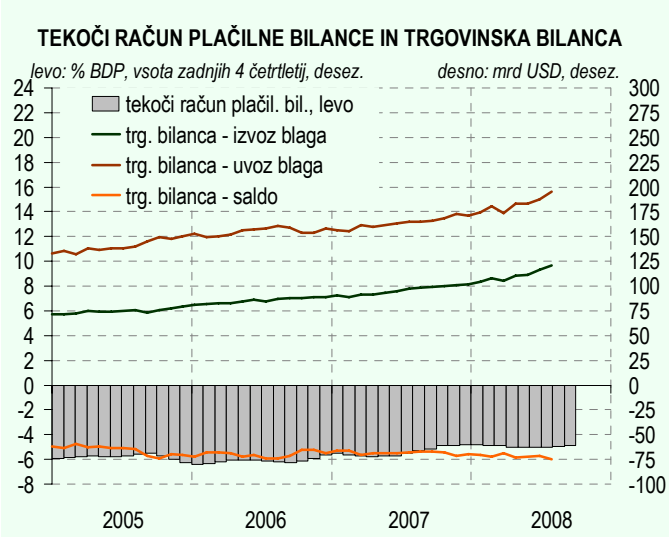






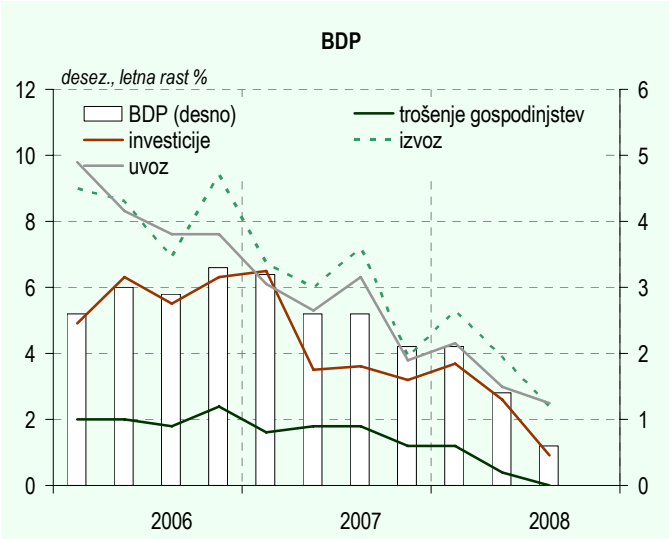


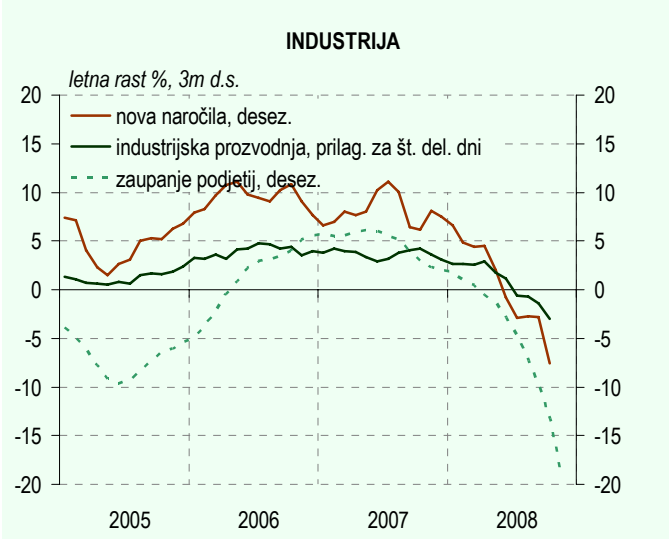


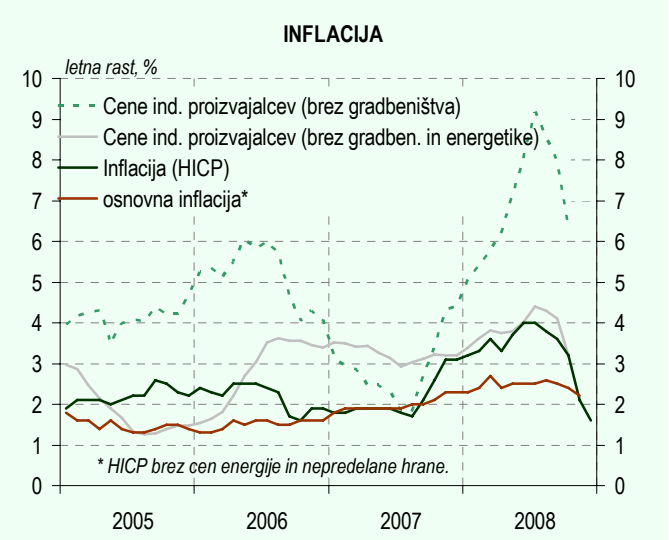


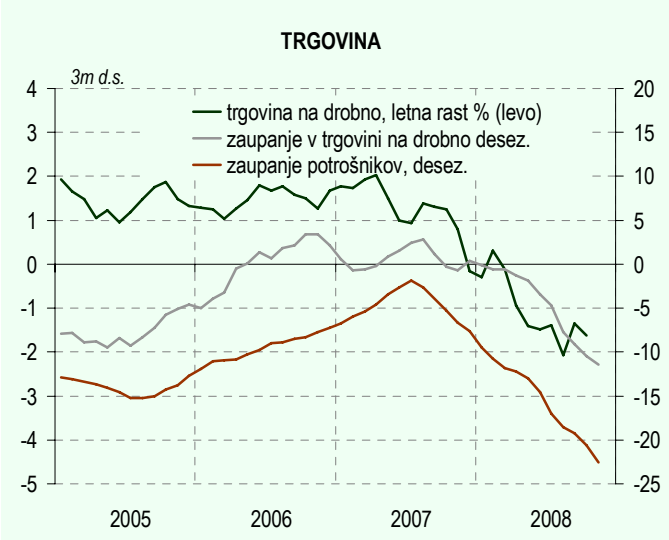
Viri: Federal Reserve Statistical Release (industrijska proizvodnja), Bureau of Labor Statistics (inflacija), Bureau of Economic Analysis (BDP), Federal Reserve Bank of St. Louis (vse ostalo)

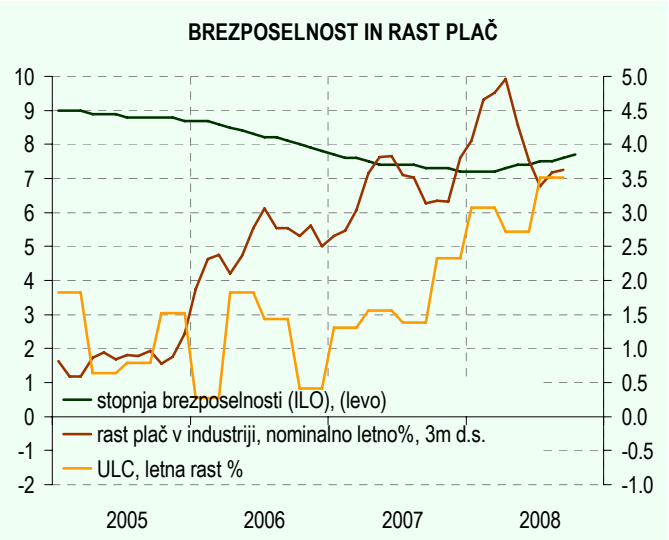
Evroobmočje

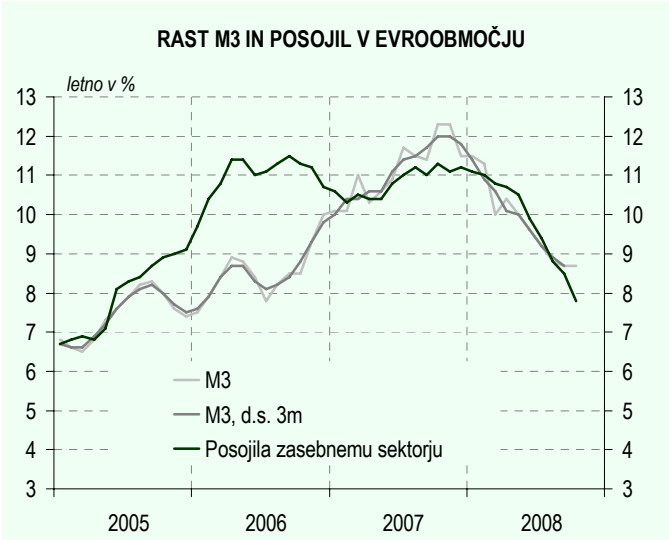






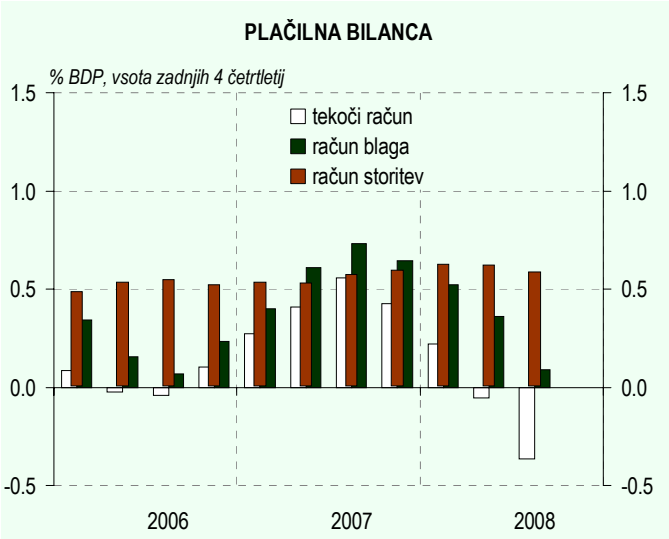


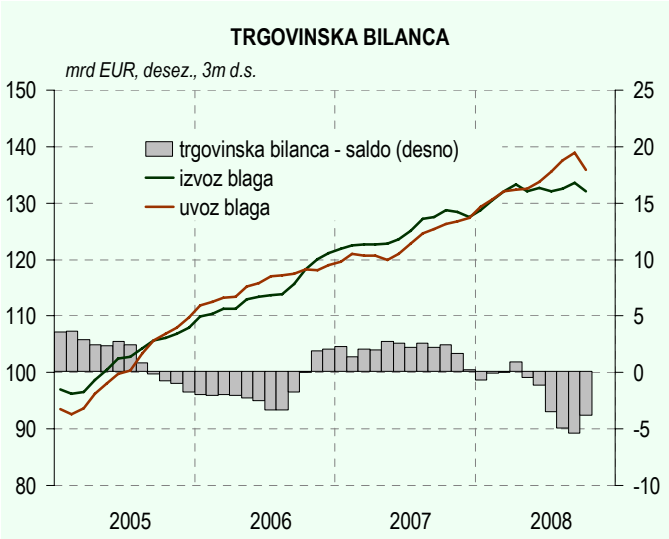


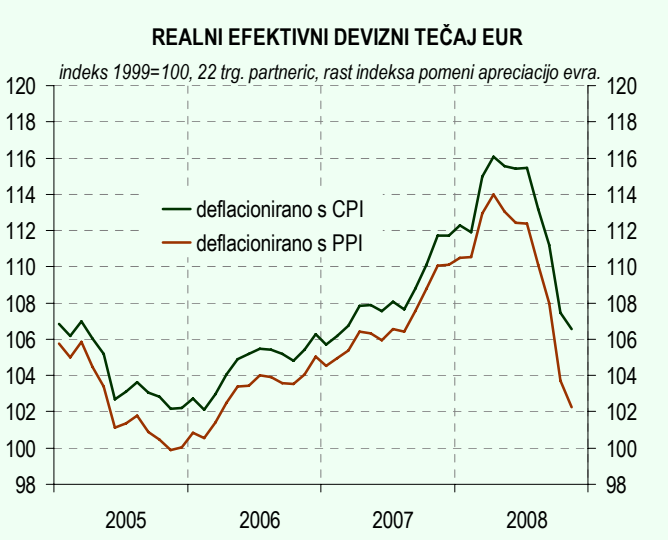


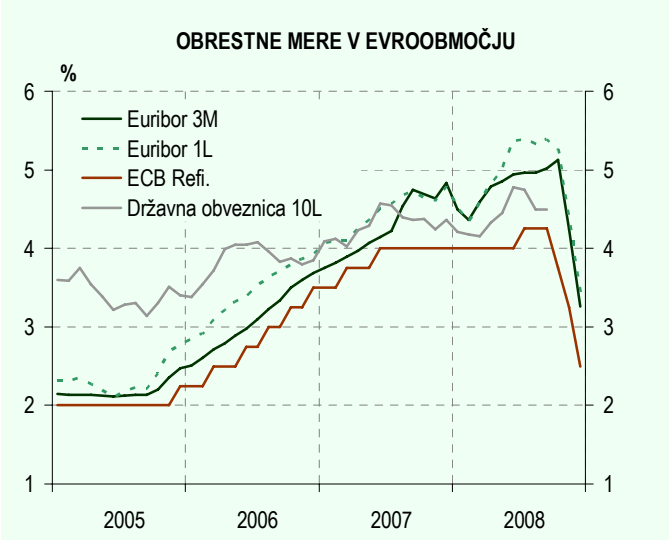
Viri: Eurostat, ECB

Evroobmočje









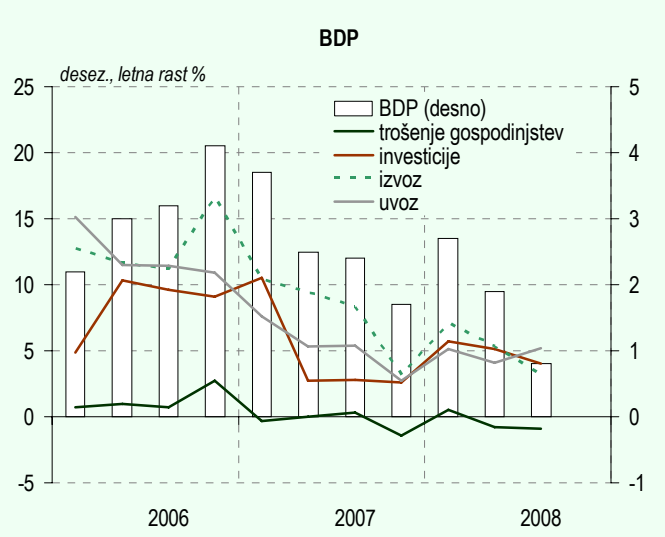
Viri: Eurostat, ECB

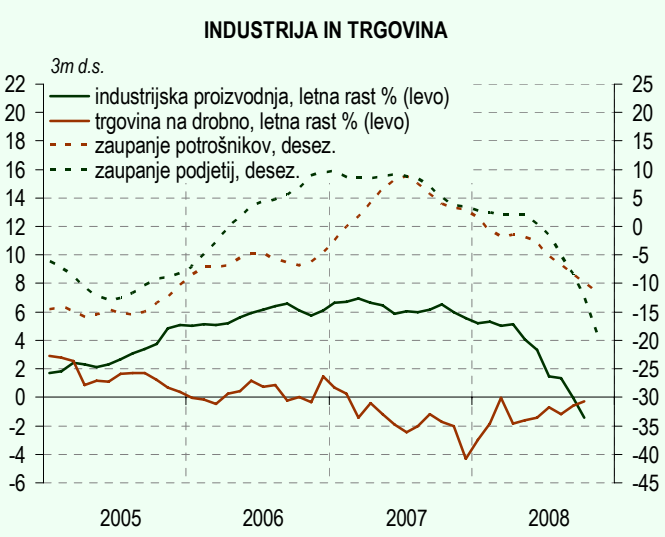
	BDP		Inflacija (HICP)		Brezposelnost (1)		Tekoči račun		Saldo javnih financ	
	2007	2008	2007	2008	2007	2008	2007	2008	2007	2008
EVROOBMOČJE							(v % BDP)		(v % BDP)	
EU (27)	**2,9**	1,4	**2,4**	3,9	**7,1**	7,0	**-0,7**	-1,0	**-0,9**	-1,6
Evroobmočje	**2,6**	1,0	**2,1**	3,3	**7,5**	7,6	**0,2**	-0,3	**-0,6**	-1,3
Avstrija	**3,1**	1,7	**2,2**	3,4	**4,4**	3,9	**3,3**	3,1	**-0,4**	-0,6
Belgija	**2,8**	1,3	**1,8**	4,7	**7,5**	7,1	**2,4**	0,6	**-0,3**	-0,5
Ciper	**4,4**	3,3	**2,2**	4,5	**4,0**	3,9	**-9,7**	-10,5	**3,5**	1,0
Finska	**4,5**	2,2	**1,6**	4,2	**6,9**	6,3	**5,3**	5,6	**5,3**	5,1
Francija	**2,1**	0,9	**1,6**	3,3	**8,3**	8,0	**-2,8**	-3,5	**-2,7**	-3,0
Grčija	**4,0**	2,9	**3,0**	4,4	**8,3**	9,0	**-14,0**	-14,3	**-3,5**	-2,5
Irska	**6,0**	-1,6	**2,9**	3,3	**4,6**	6,1	**-5,4**	-5,3	**0,2**	-5,5
Italija	**1,4**	-0,4	**2,0**	3,6	**6,1**	6,8	**-1,7**	-2,1	**-1,6**	-2,5
Luksemburg	**5,2**	2,5	**2,7**	4,4	**4,1**	4,0	**9,8**	8,3	**3,2**	2,7
Malta	**3,7**	2,4	**0,7**	4,4	**6,4**	5,9	**-5,5**	-6,6	**-1,8**	-3,8
Nemčija	**2,5**	1,6	**2,3**	3,0	**8,4**	7,3	**7,6**	7,5	**-0,2**	0,0
Nizozemska	**3,5**	2,0	**1,6**	2,5	**3,2**	3,0	**9,8**	7,1	**0,3**	1,2
Portugalska	**1,8**	0,5	**2,4**	2,9	**8,1**	7,7	**-10,0**	-11,6	**-2,6**	-2,2
Španija	**3,7**	1,2	**2,8**	4,2	**8,3**	10,8	**-10,1**	-9,9	**2,2**	-1,6
Slovenija	**6,8**	4,4	**3,8**	6,2	**4,9**	4,5	**-4,0**	-6,3	**0,5**	-0,2

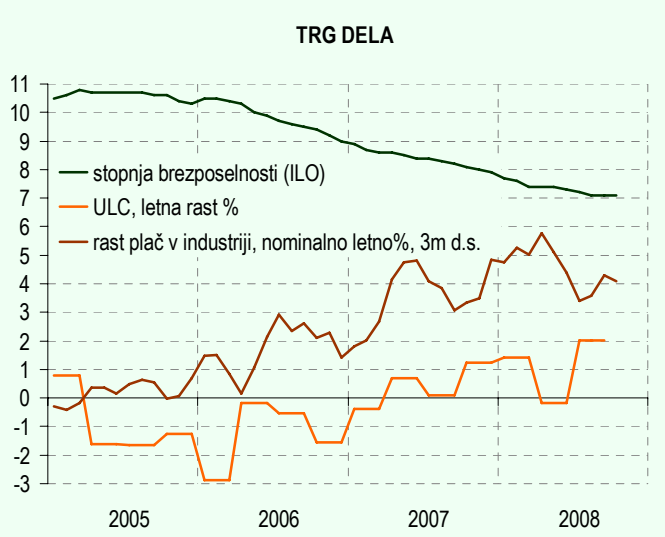
Opomba: Podatki zapisani **odebeljeno sivo** so napovedi. (1) Kot je navedeno v Jesenski napovedi Evropske komisije 2008.

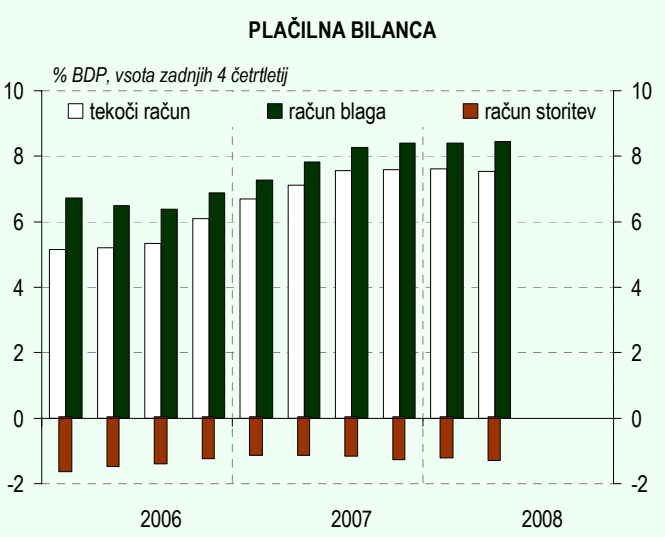
Viri: Eurostat, Evropska komisija (november 08'), OECD, Consensus (december 08'), MDS (oktober 08'), BS (oktober 08'), Eastern Europe Consensus (december 08`)

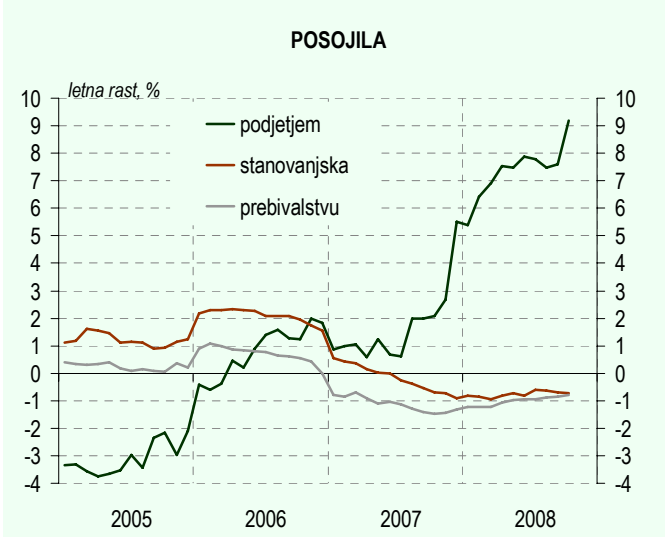
Nemčija

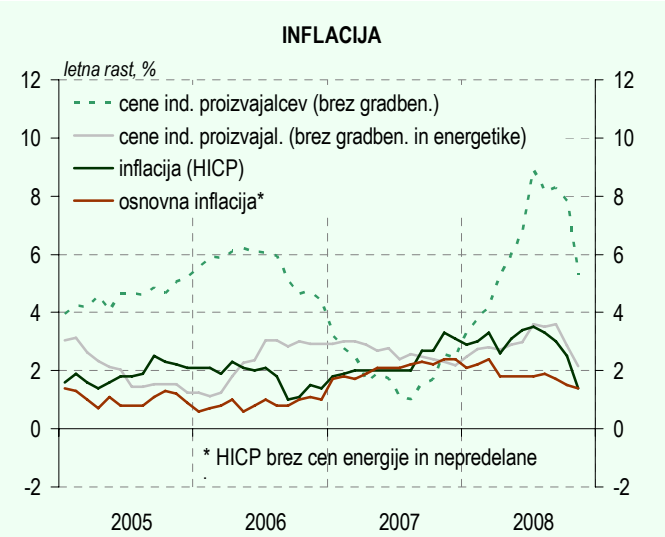






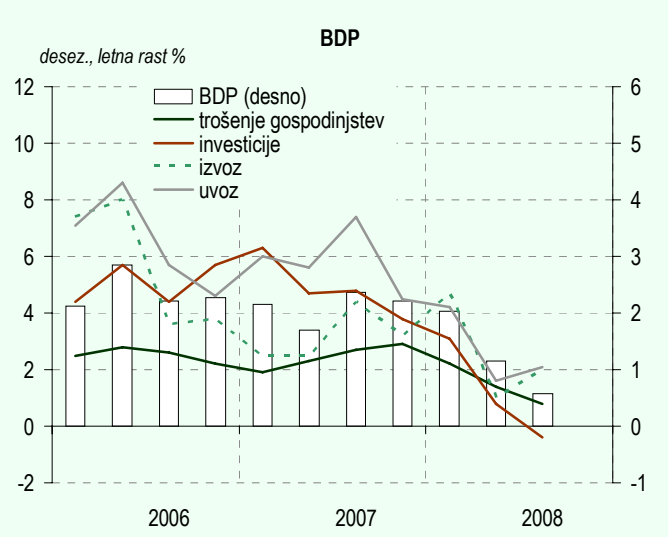


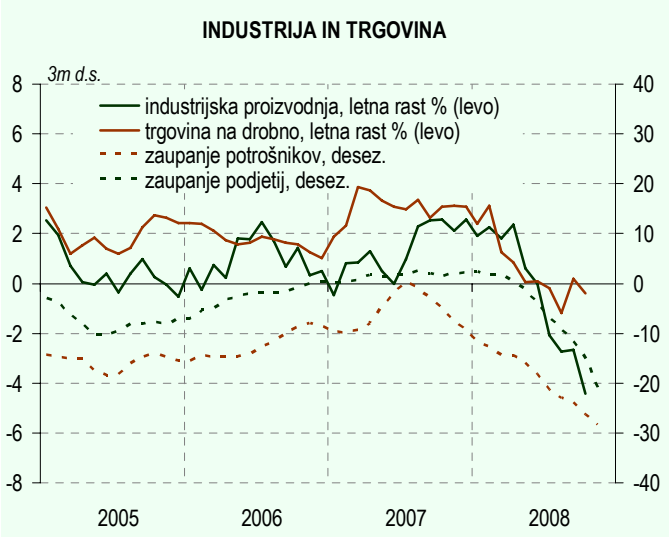


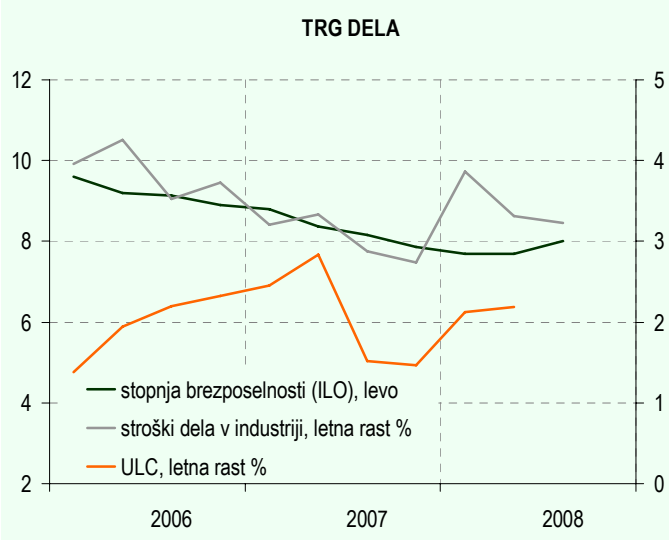


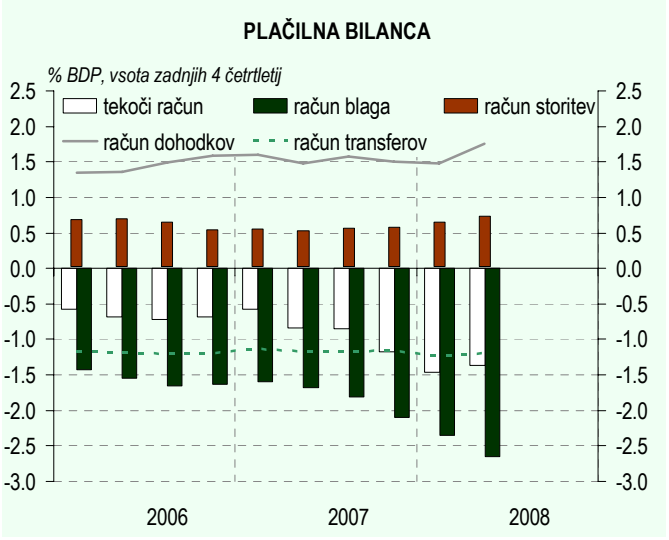
Viri: Eurostat, ECB

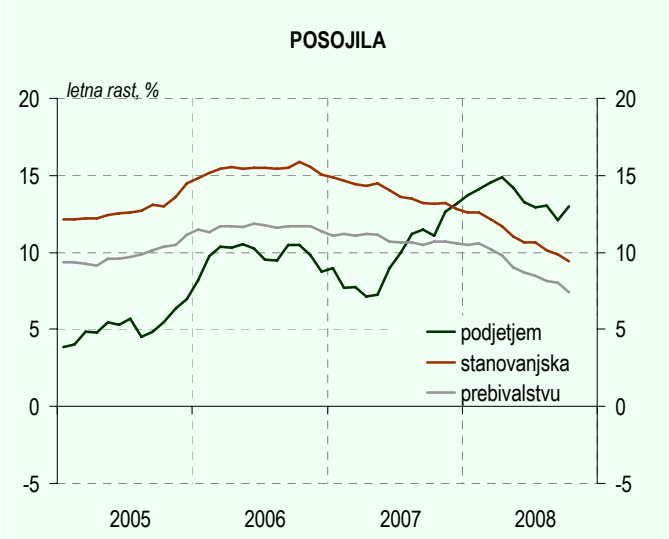
Francija

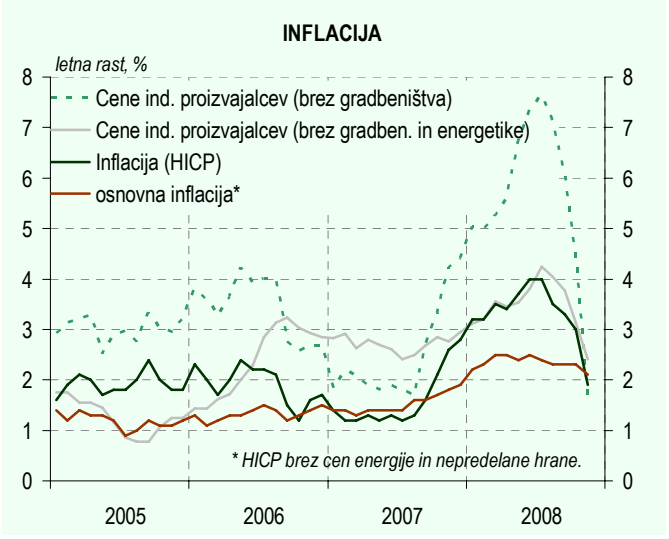






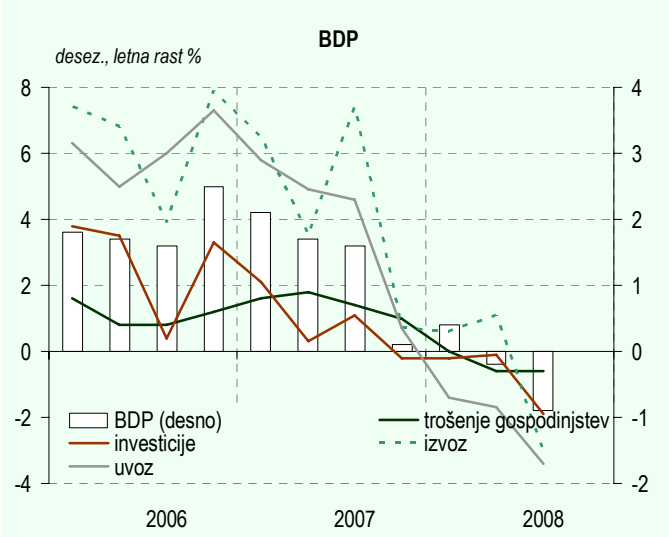


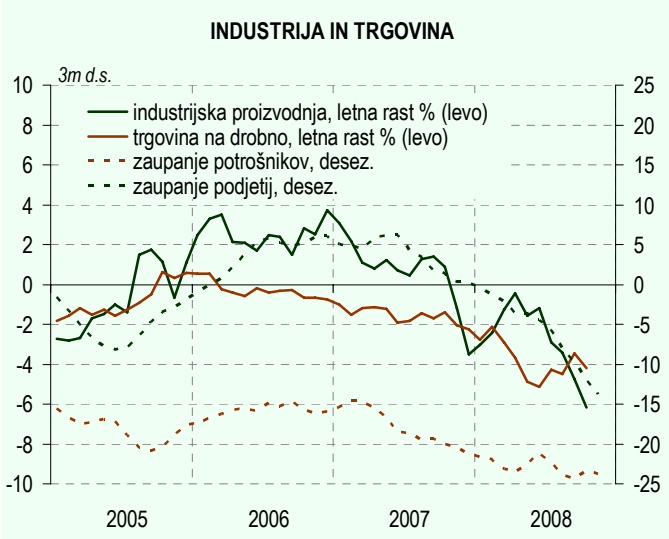


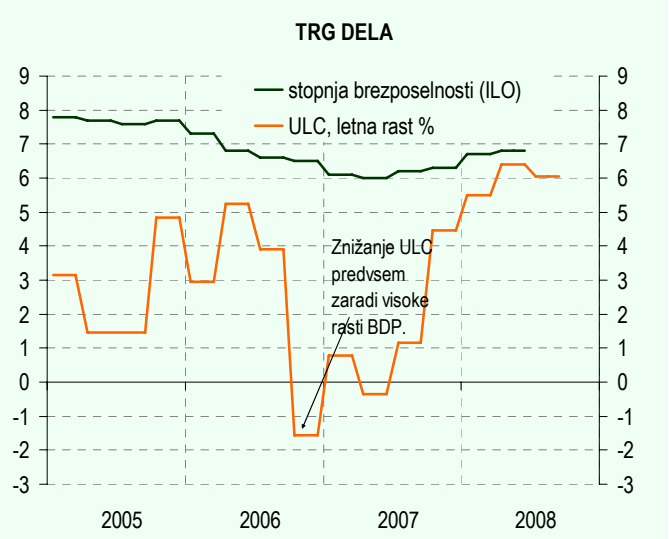


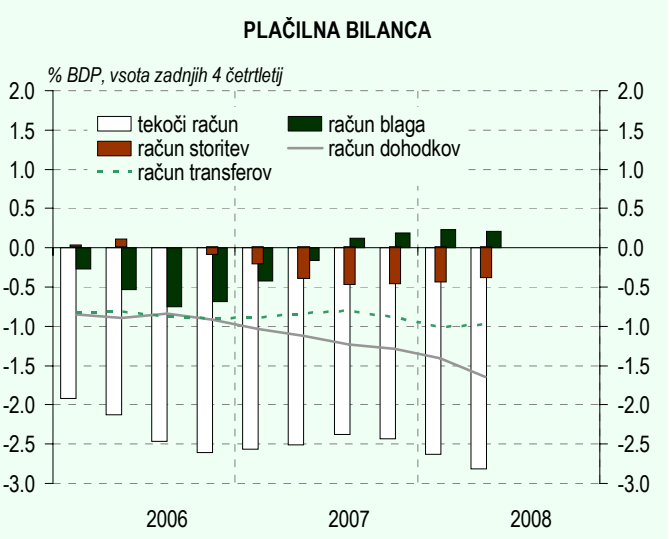
Viri: Eurostat, ECB

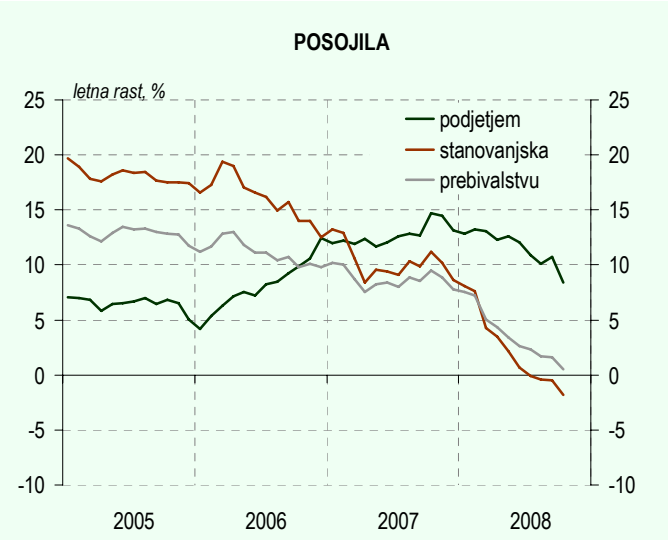
Italija

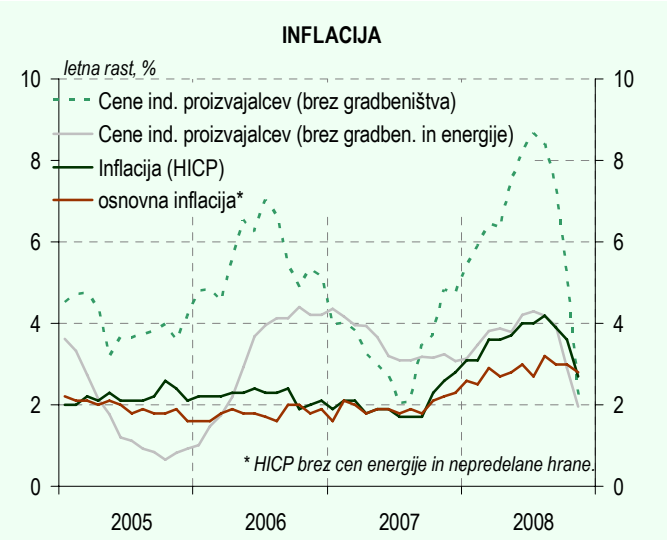






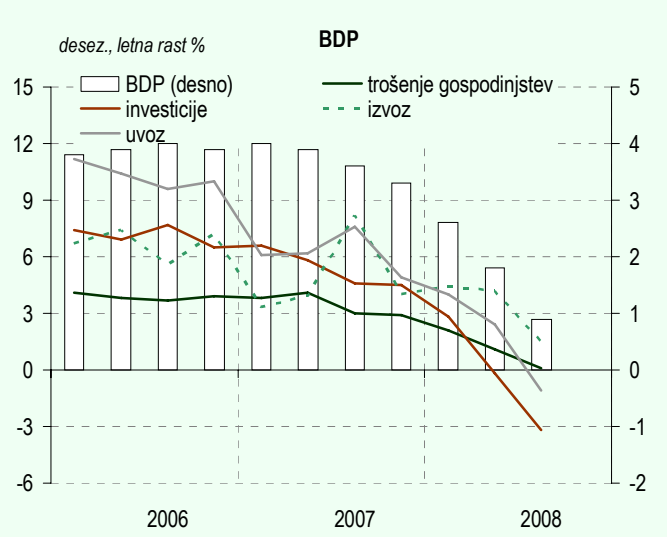


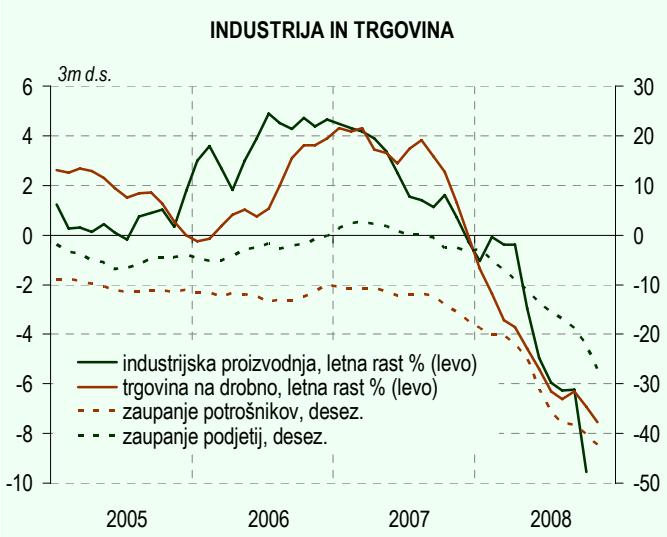


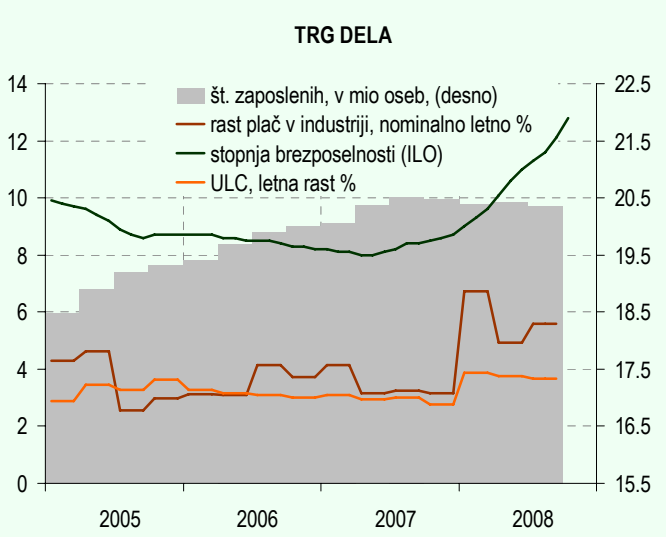


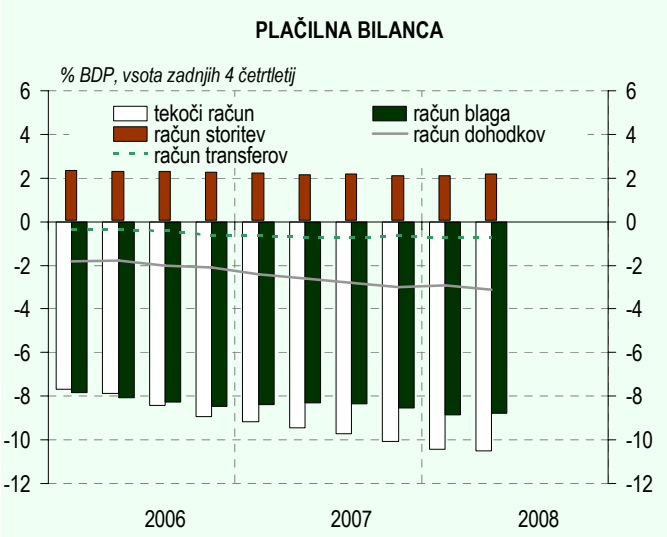
Viri: Eurostat, ECB

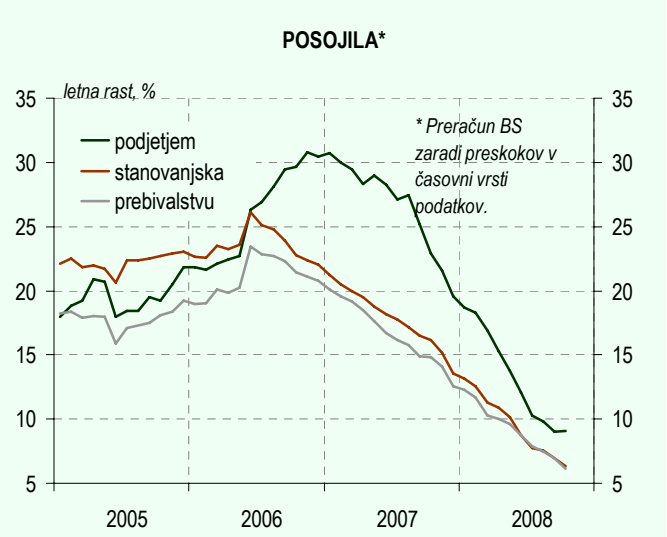
Španija

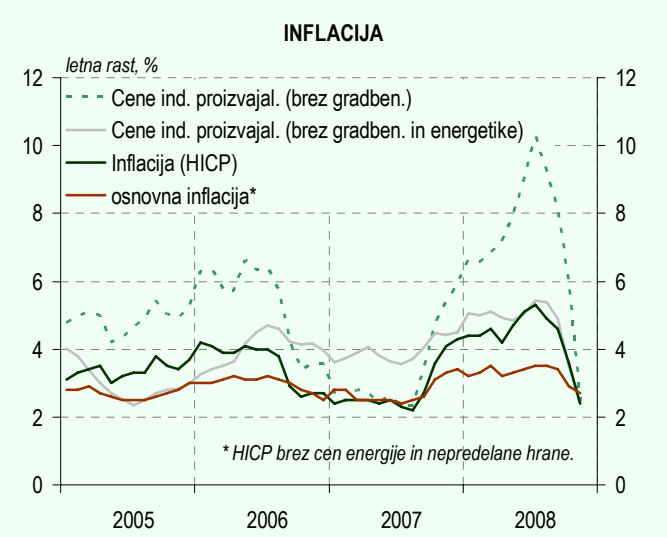






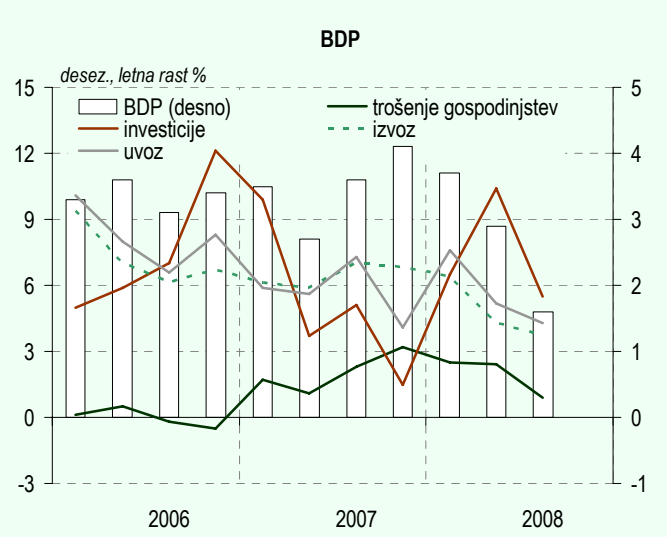


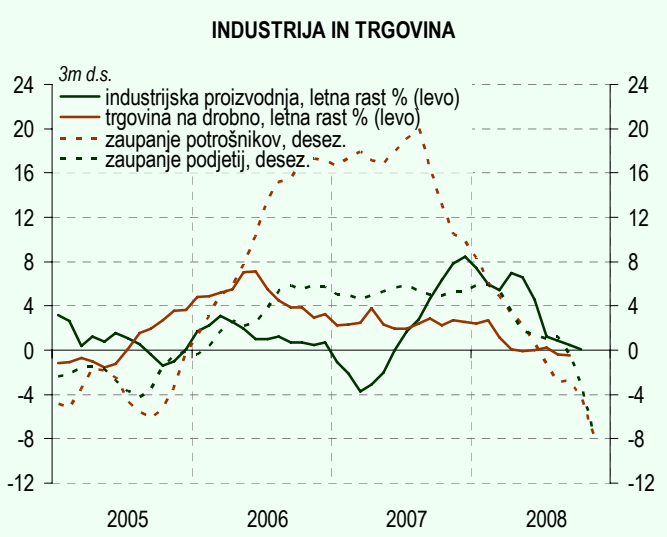


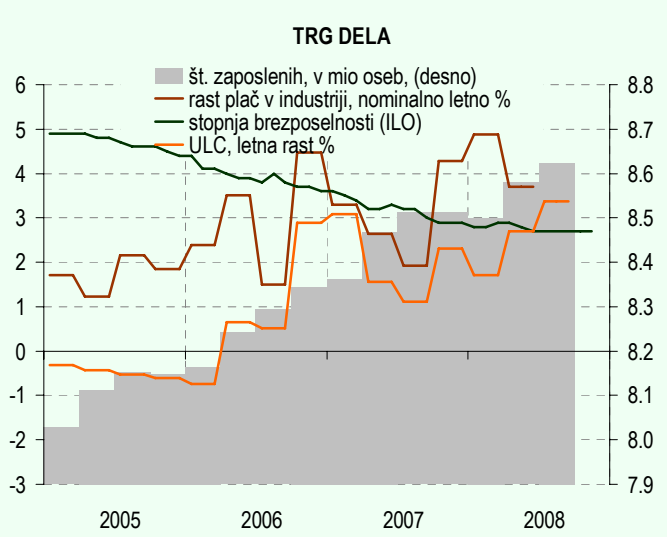


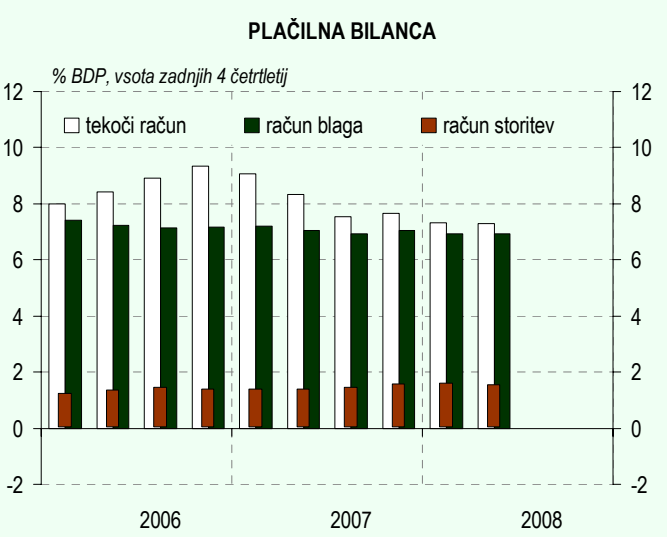
Viri: Eurostat, ECB

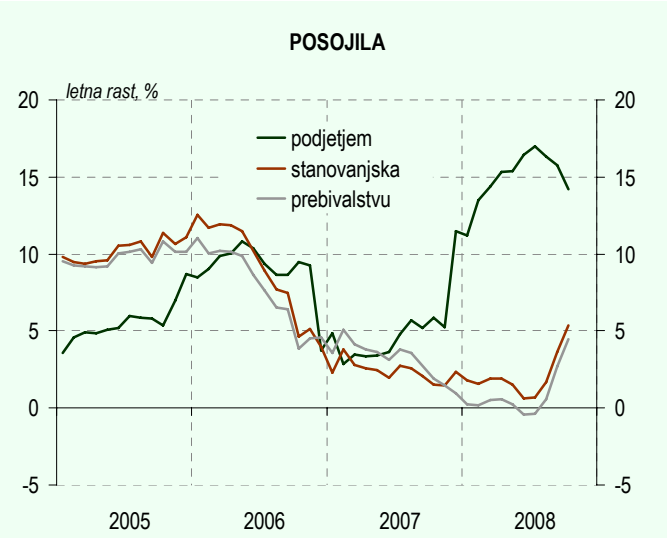
Nizozemska

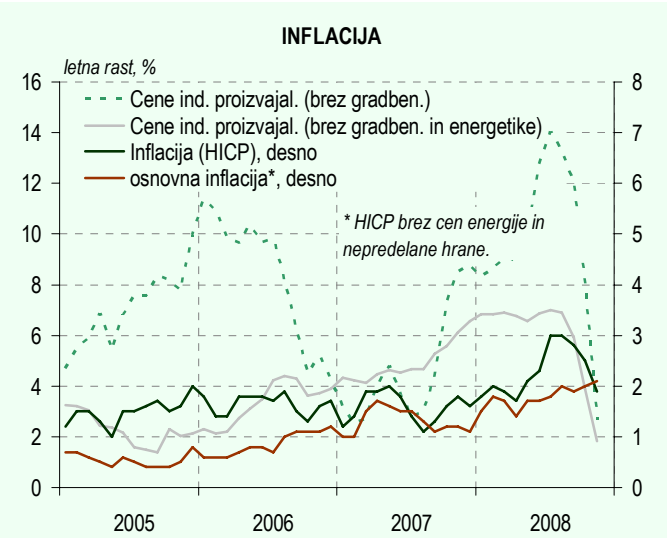






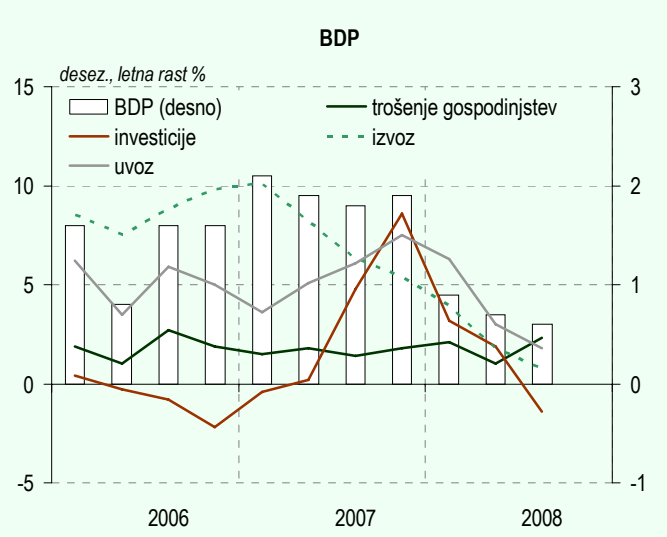


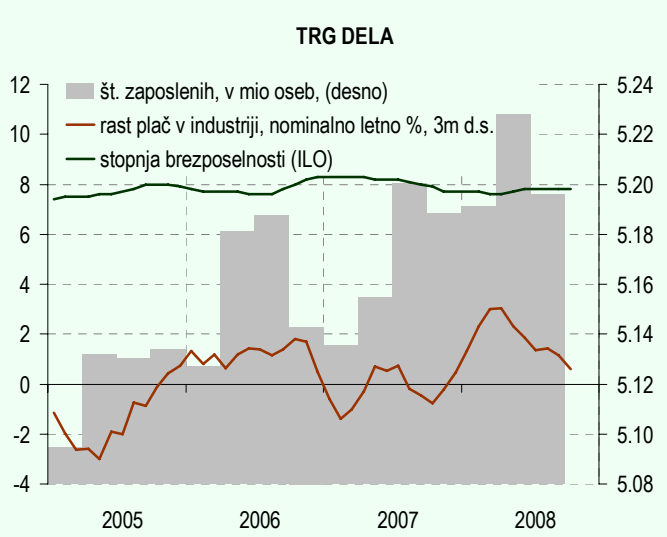


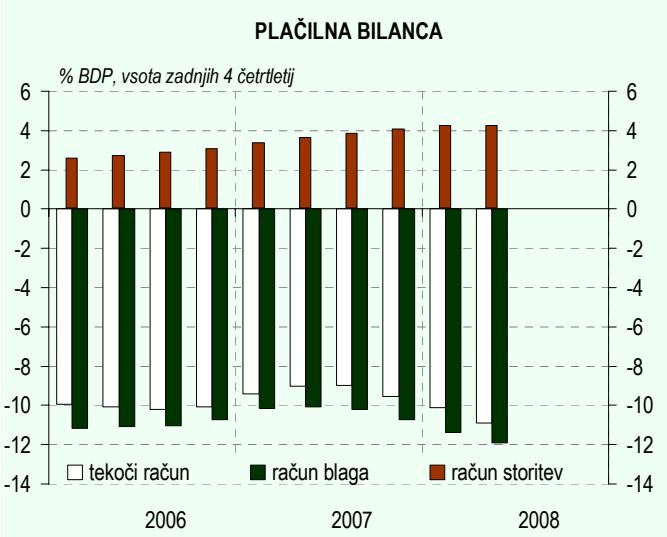


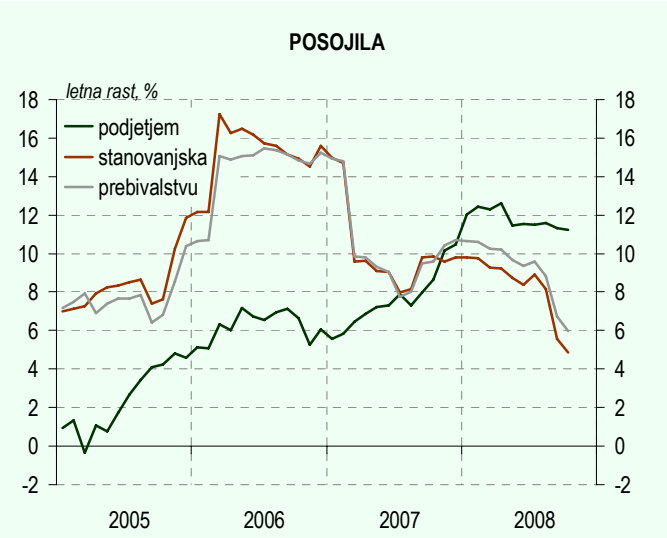
Viri: Eurostat, ECB

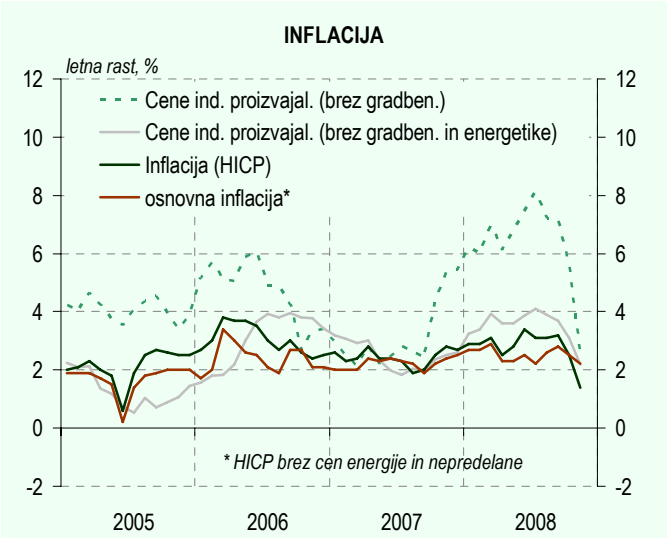
Portugalska





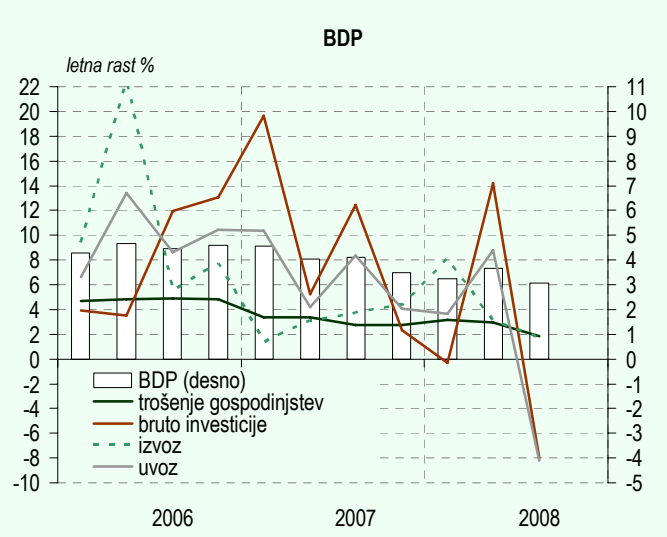


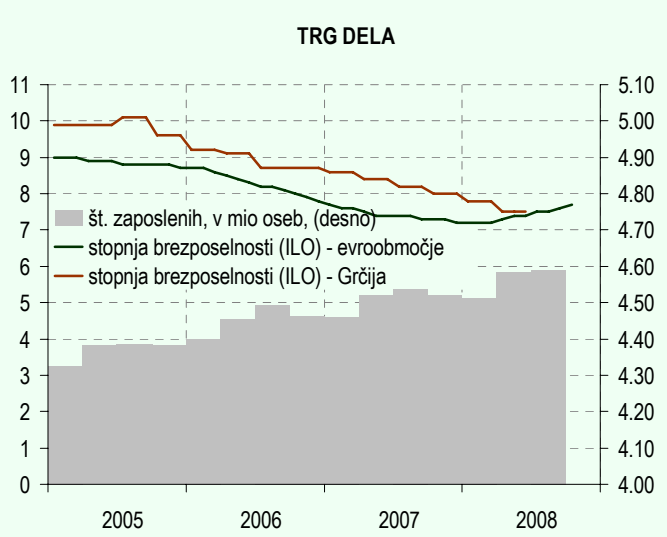


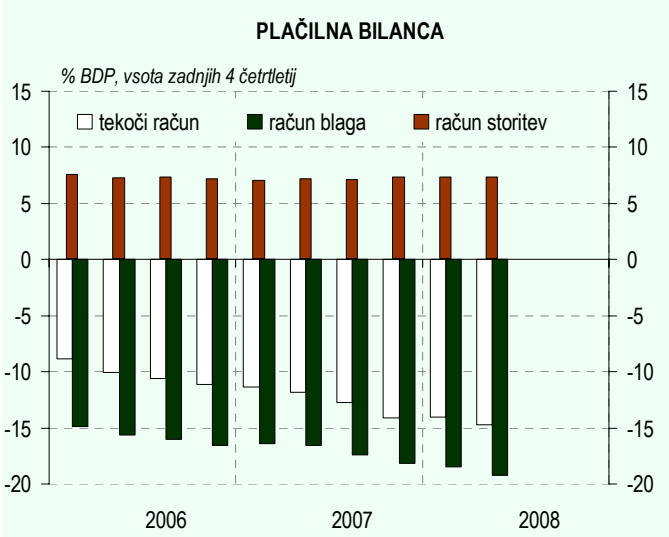


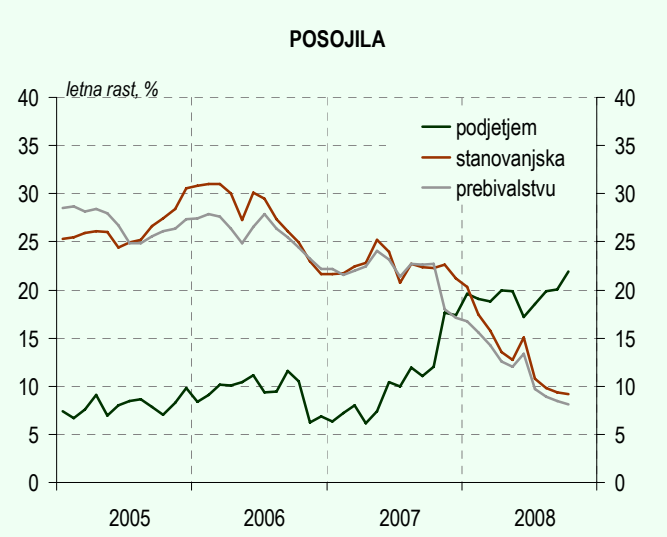
Viri: Eurostat, ECB, Statistics Portugal (BDP)

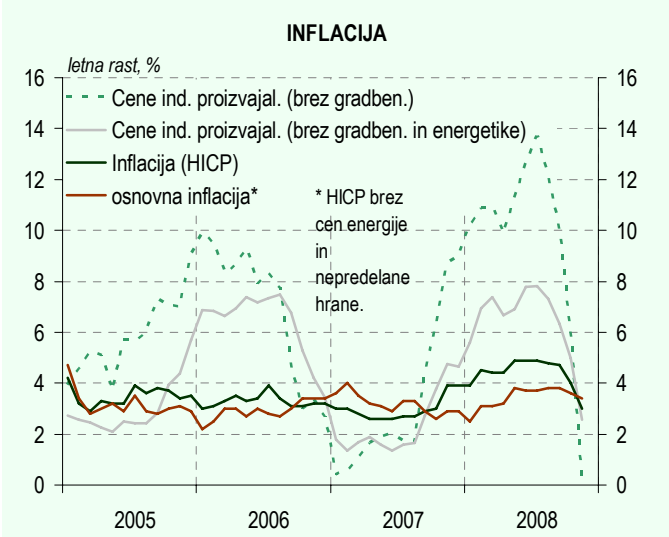
Grčija





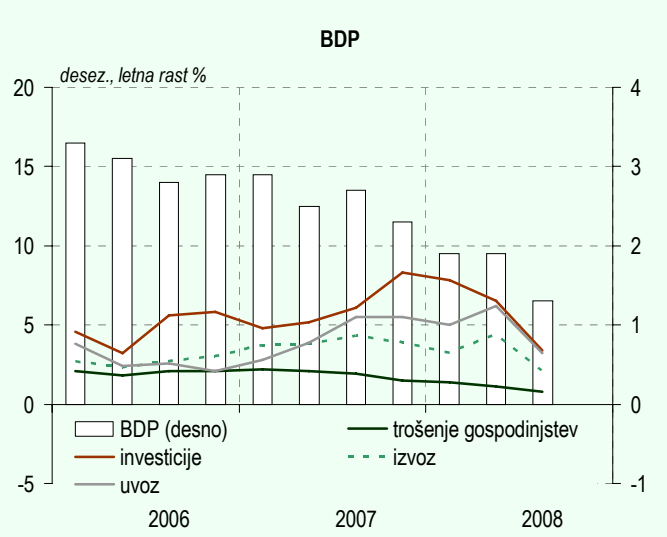


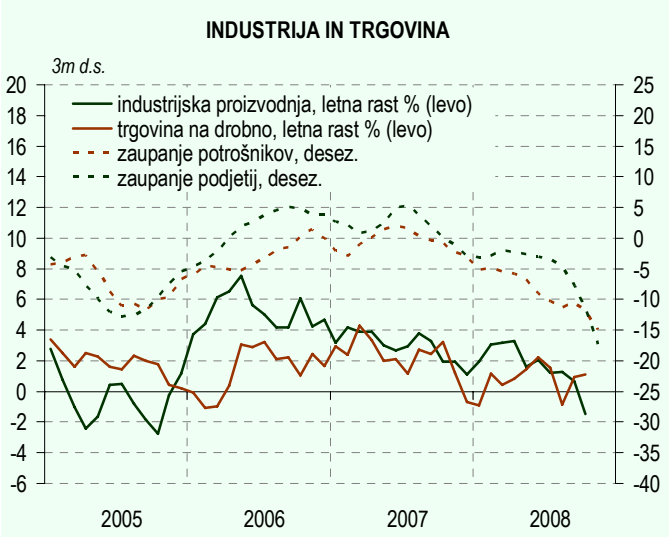


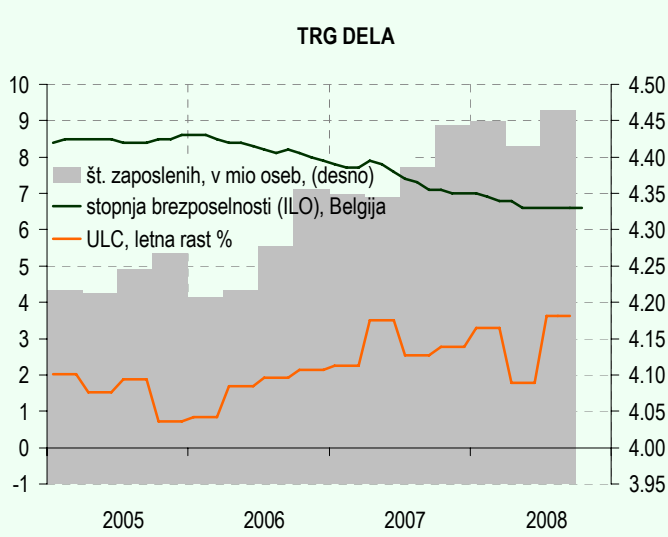


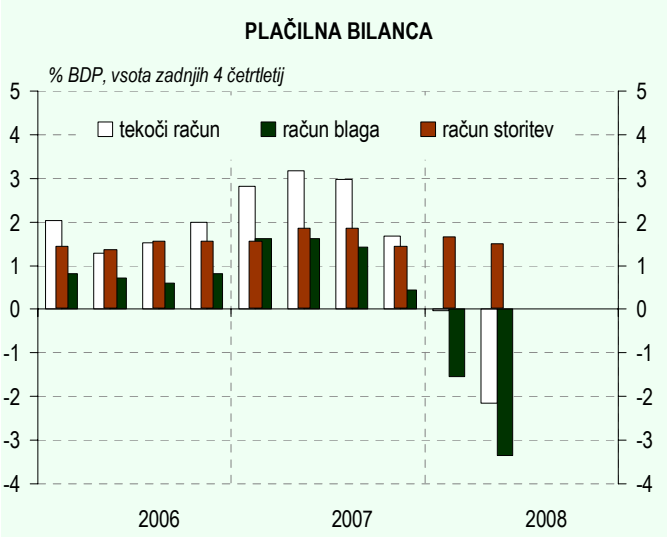
Viri: Eurostat, ECB, General Secretariat of National Statistical Service of Greece (BDP), Bank of Greece (plačilna bilanca)

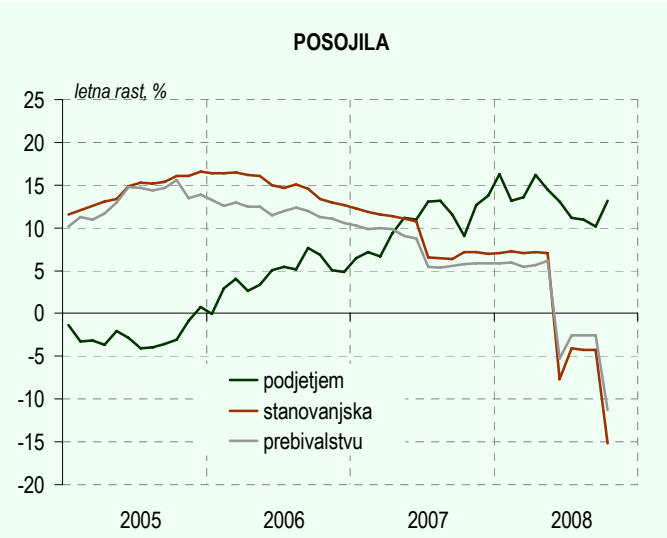
Belgija

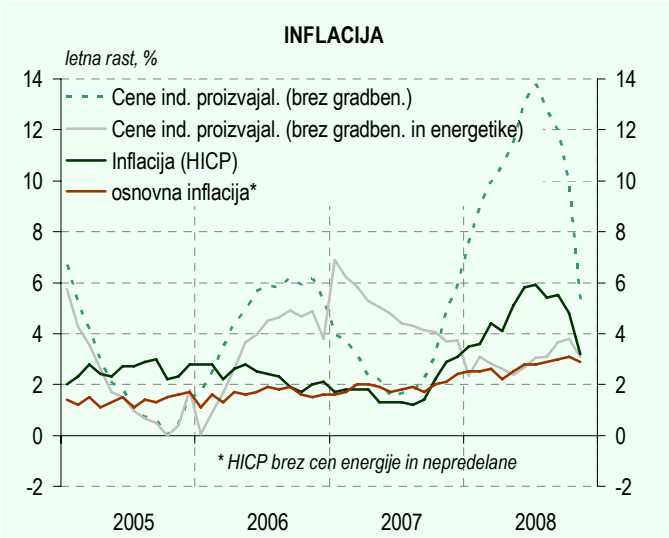






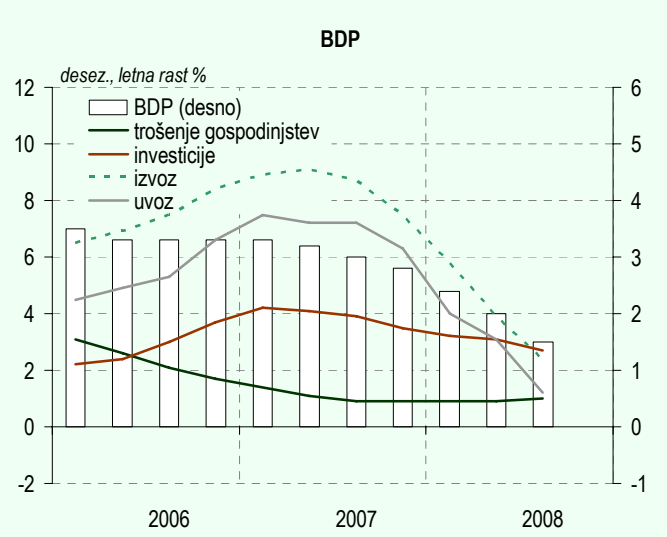


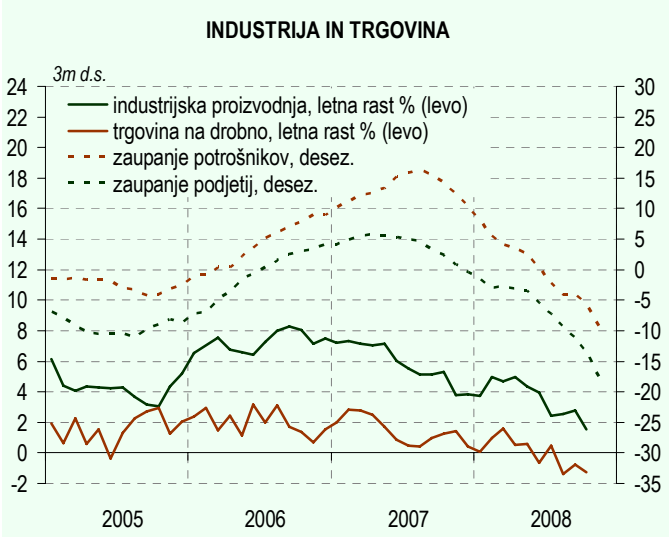


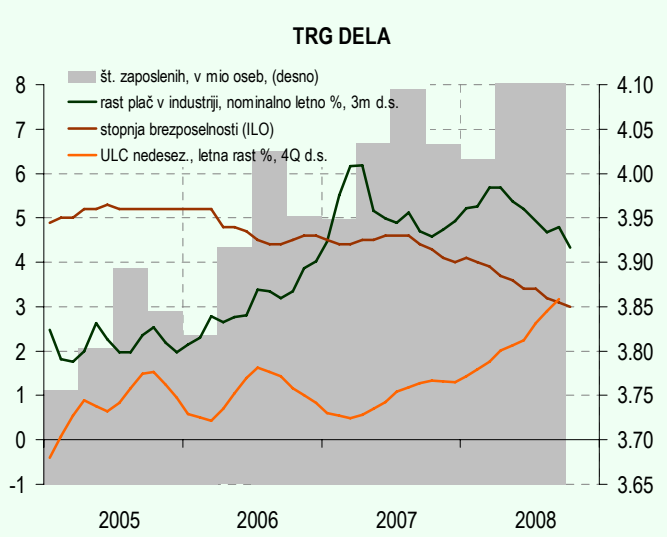


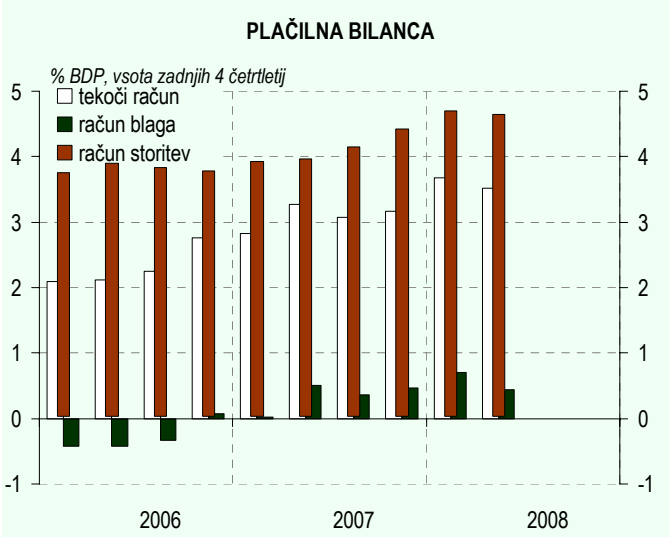
Viri: Eurostat, ECB

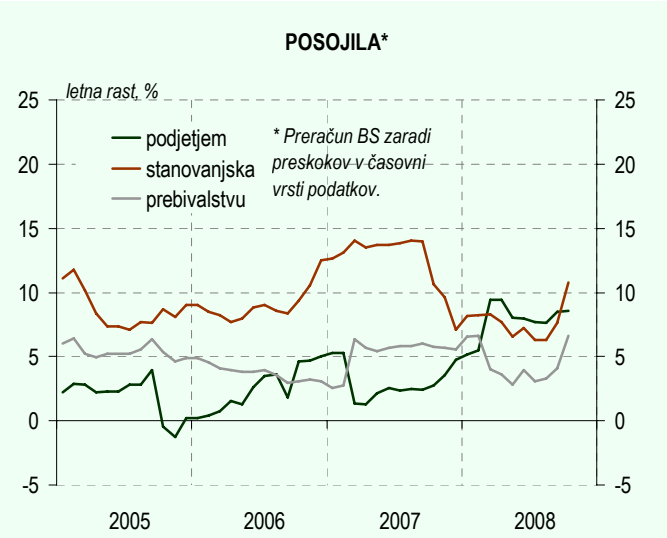
Avstrija

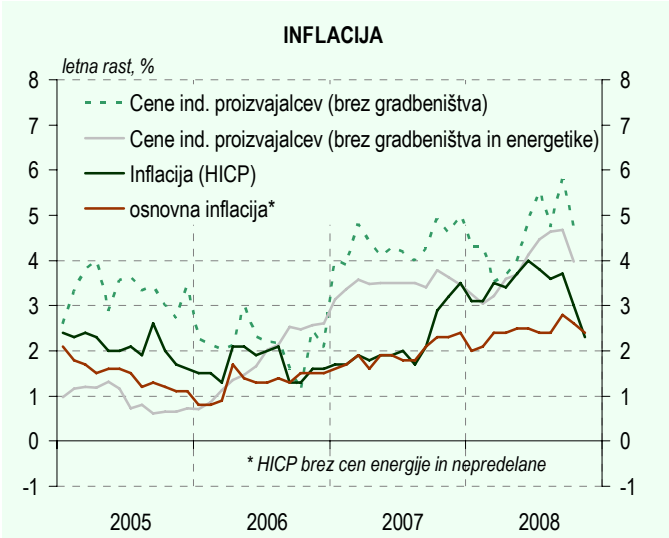






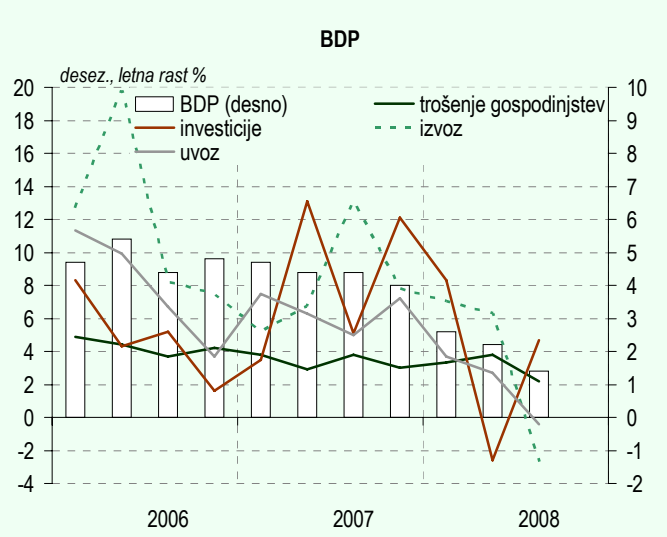


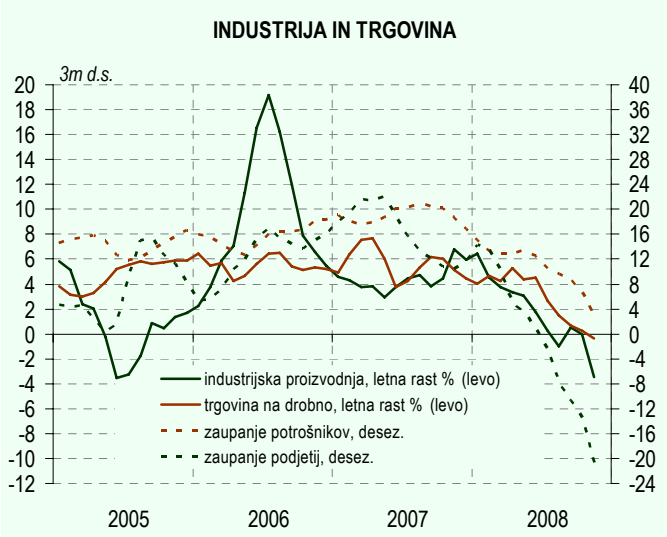


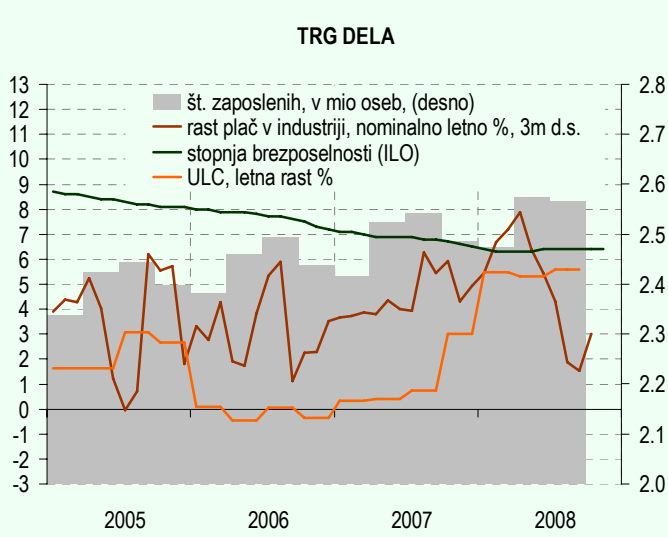


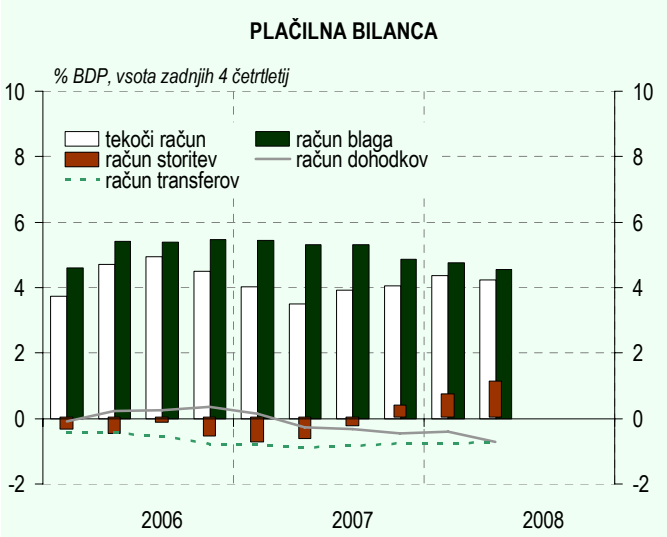
Viri: Eurostat, ECB

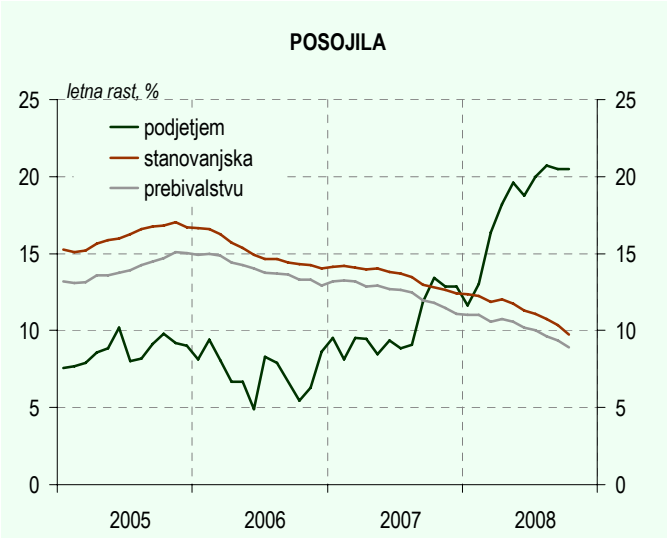
Finska

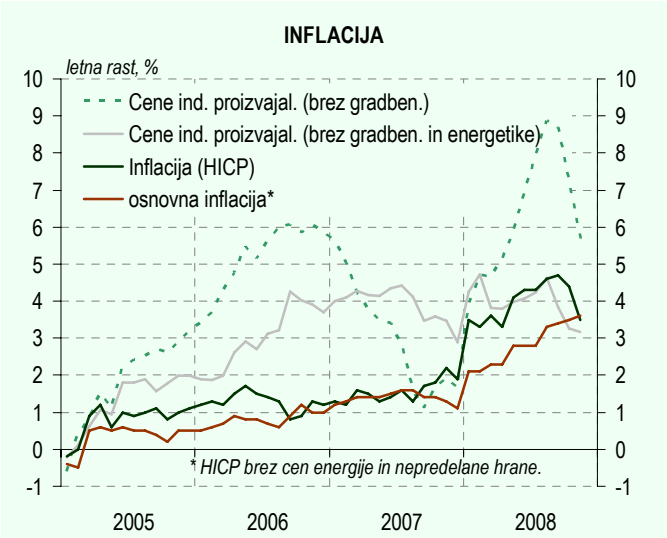






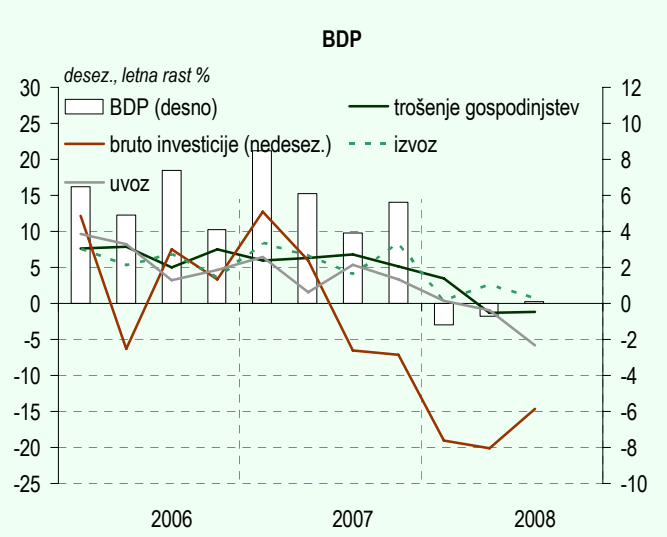


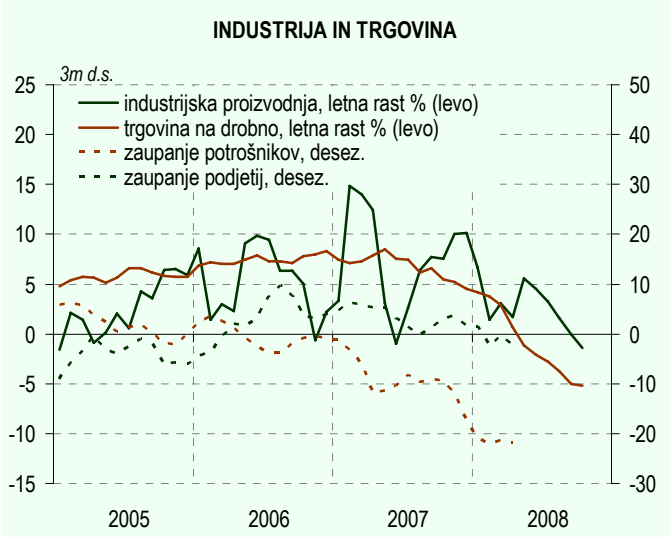


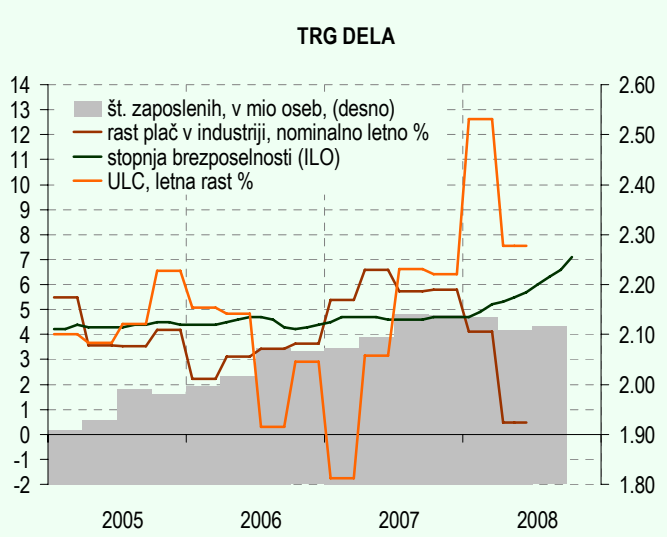


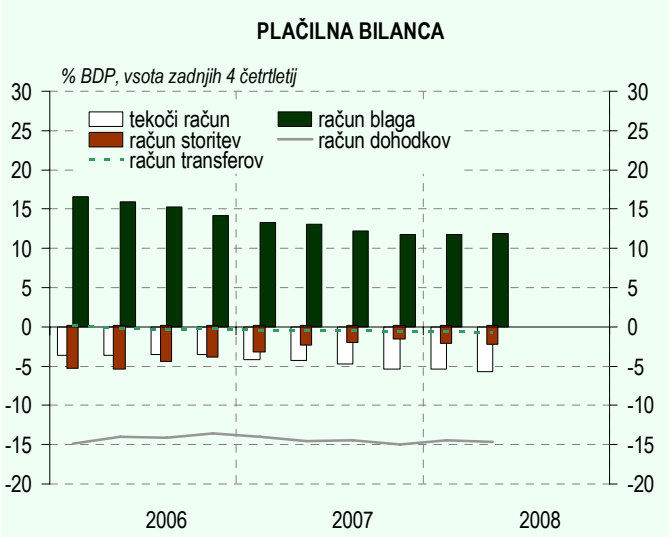
Viri: Eurostat, ECB

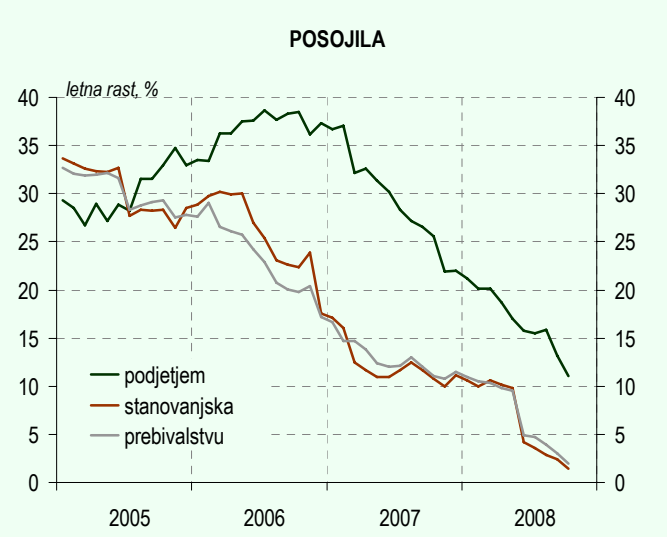
Irska

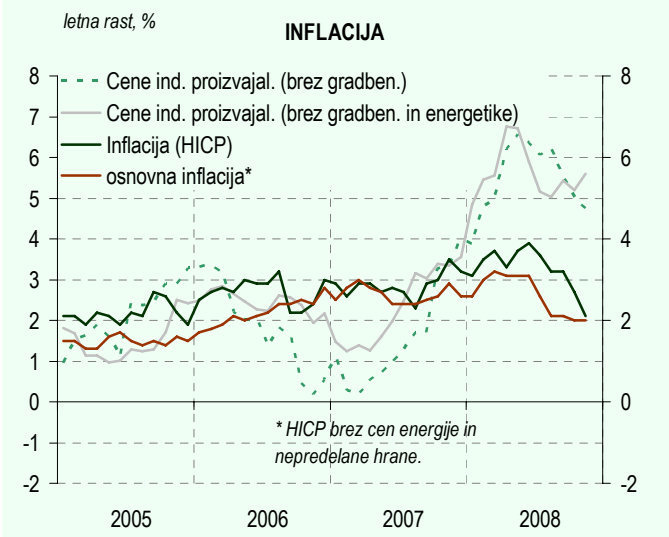






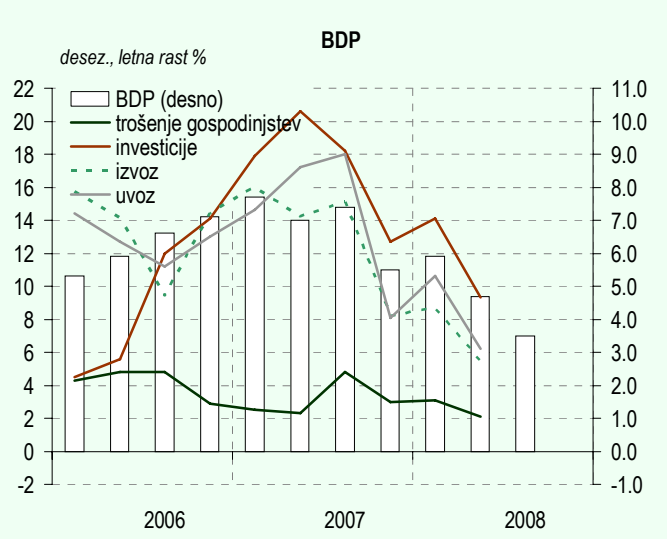


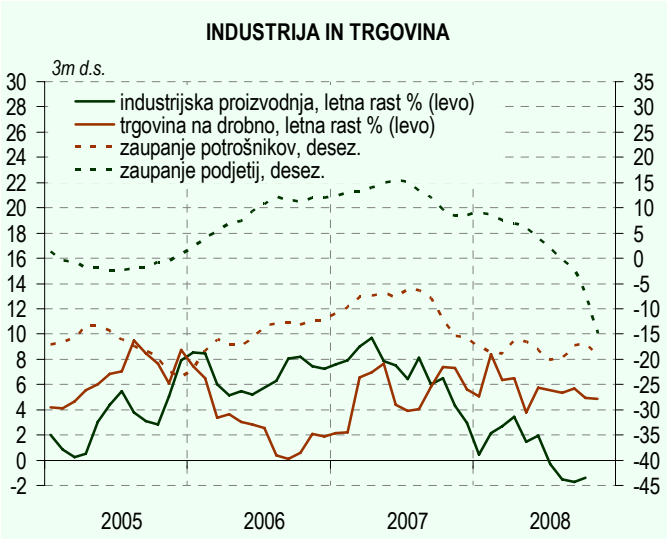


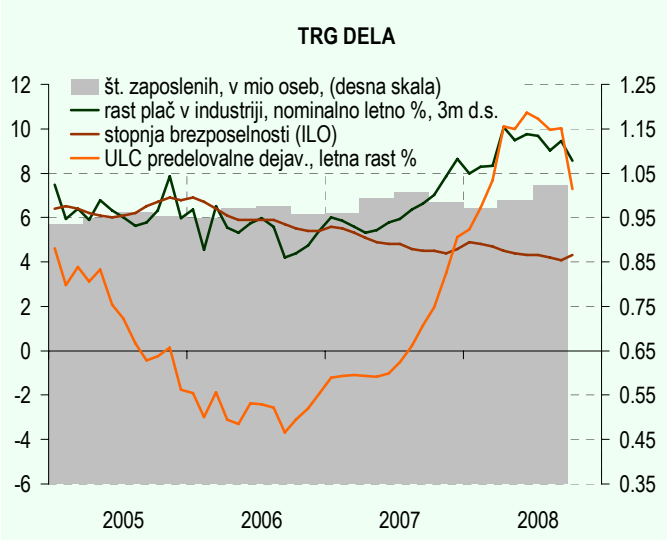


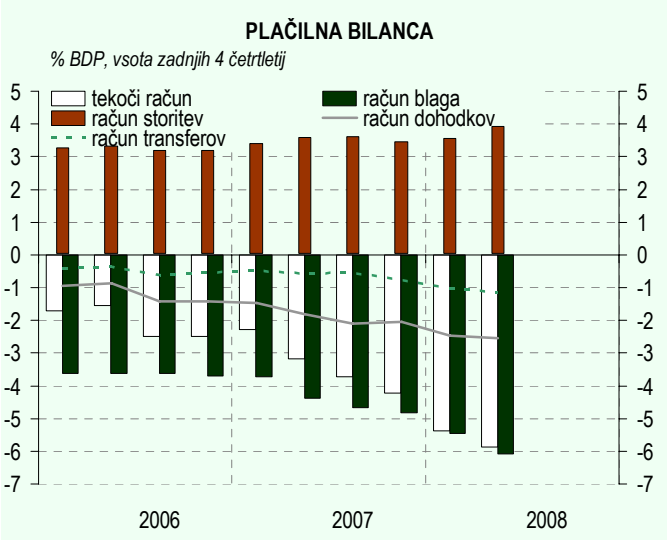
Viri: Eurostat, ECB

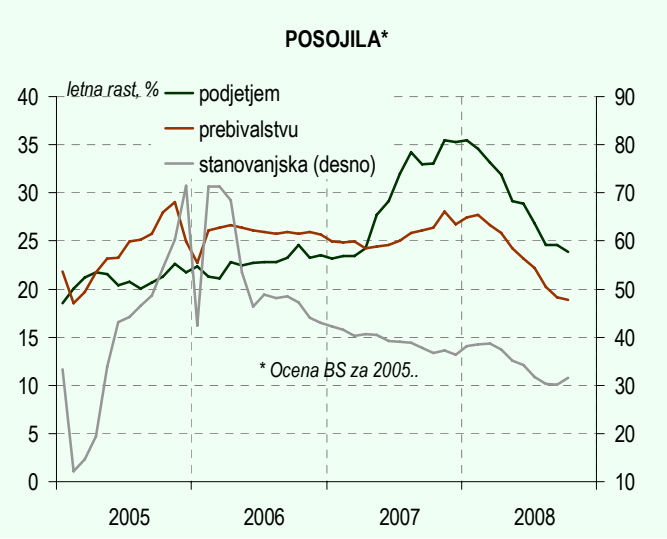
Slovenija

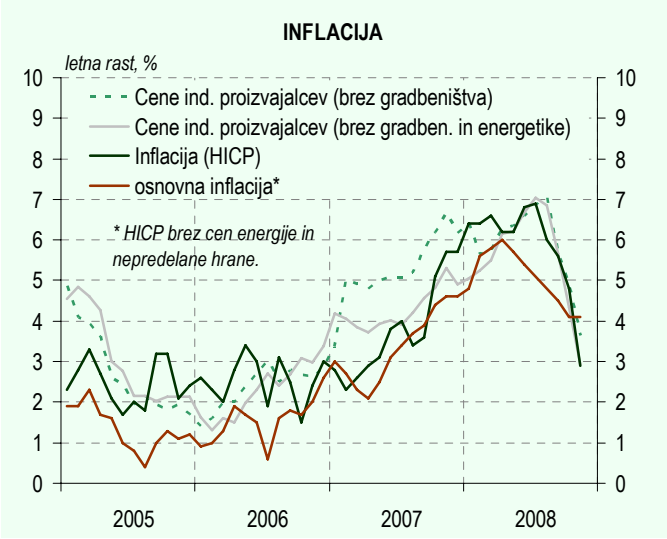






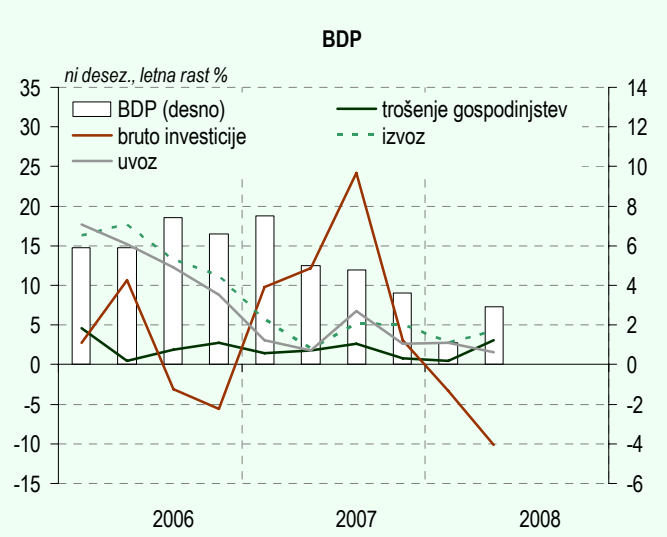


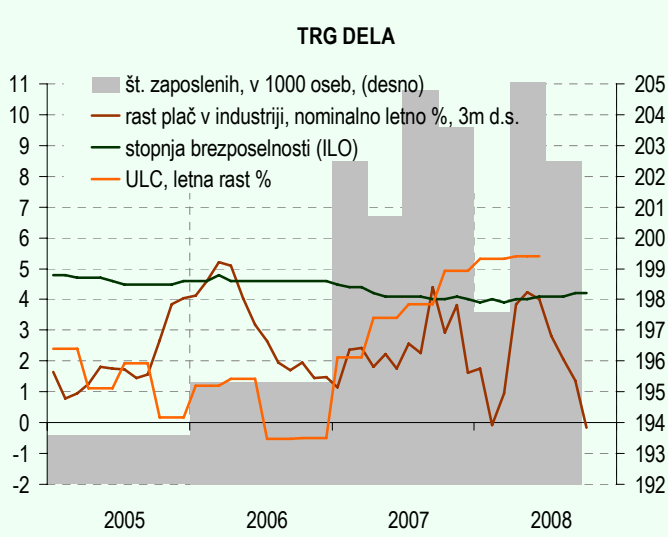


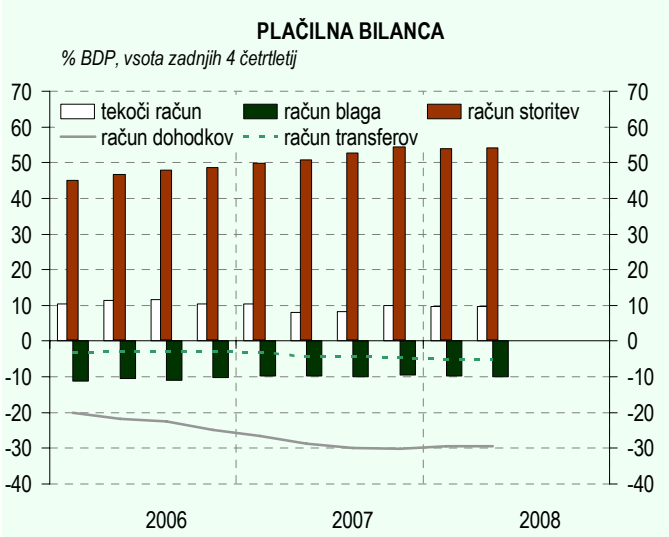


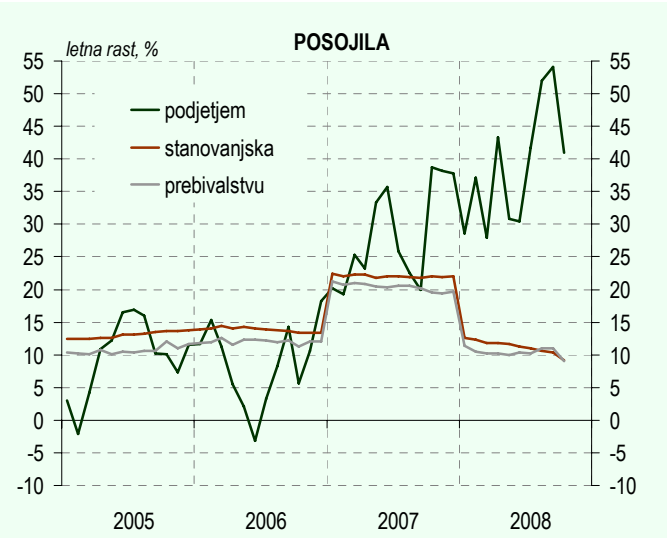
Viri: Eurostat, ECB, SURS in preračun BS (ULC predelovane dejavnosti)

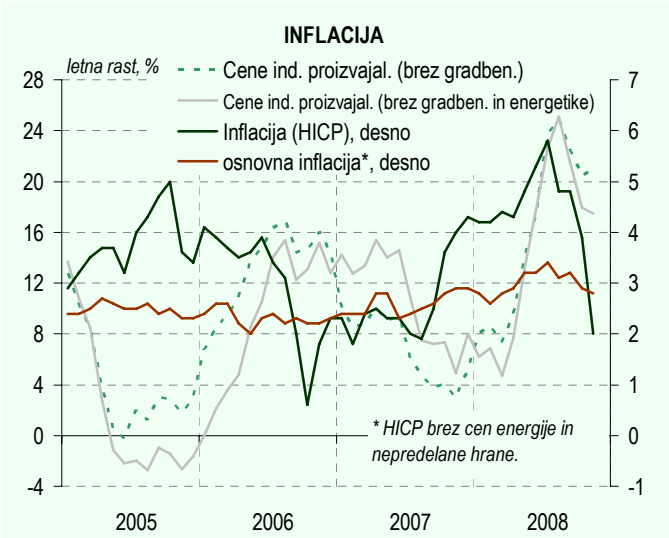
Luksemburg





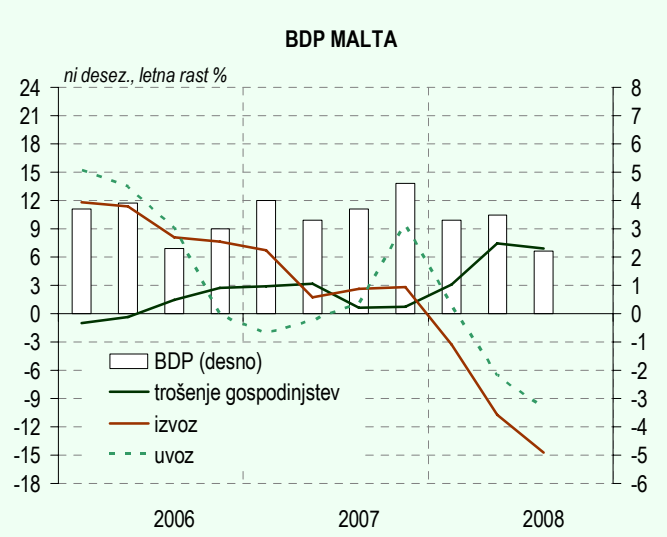


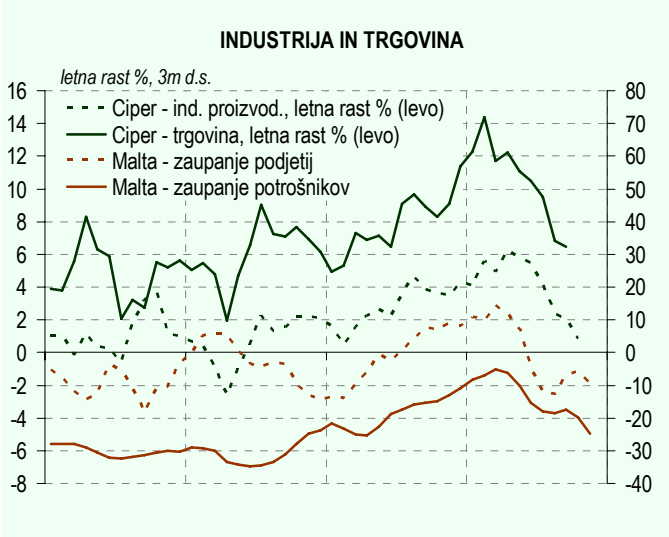


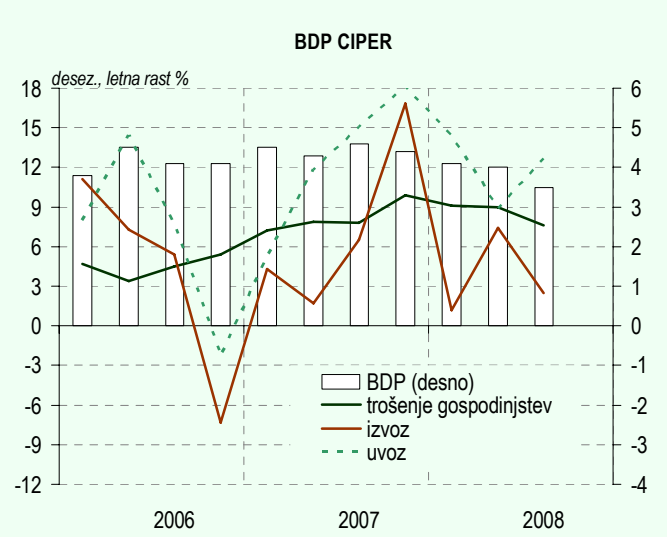


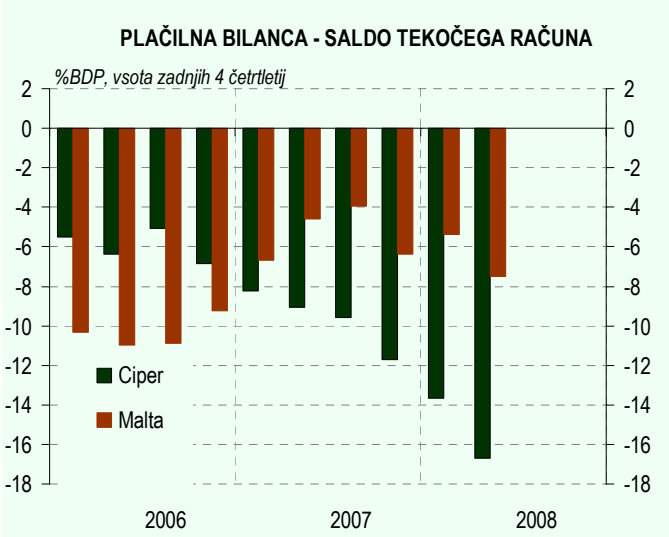
Viri: Eurostat, ECB

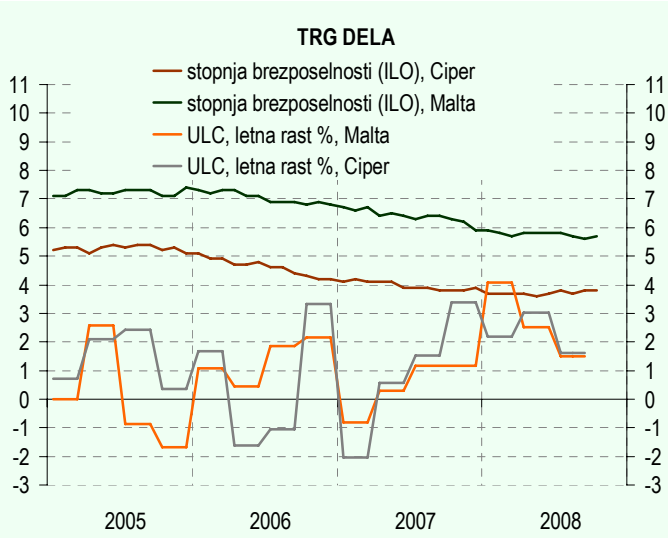
Ciper in Malta

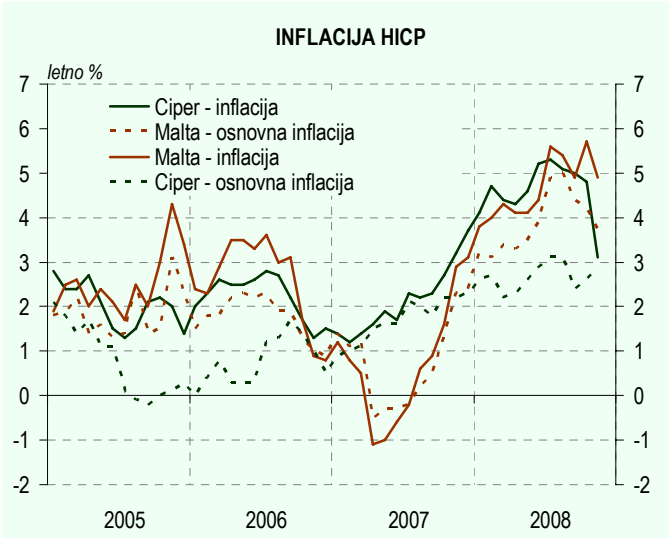












Viri: Eurostat, ECB

Članice EU izven evroobmočja

	BDP		Inflacija (HICP)		Brezposelnost		Tekoči račun		Saldo javnih financ	
	2007	2008	2007	2008	2007	2008	2007	2008	2007	2008
ČLANICE EU IZVEN EVROOBMOČJA							(v % BDP)		(v % BDP)	
Evroobmočje	**2.6**	1.0	**2.1**	3.5	**7.5**	7.6	**0.2**	-0.3	**-0.6**	-1.3
Velika Britanija	**3.0**	0.8	**2.3**	3.6	**5.3**	5.7	**-3.8**	-2.8	**-2.8**	-4.2
Danska	**1.6**	0.3	**1.7**	3.8	**3.8**	3.1	**1.2**	1.1	**4.5**	3.1
Švedska	**2.7**	0.9	**1.7**	3.0	**6.1**	6.0	**8.4**	4.6	**3.6**	2.6
Češka	**6.0**	4.2	**3.0**	6.6	**5.3**	5.0	**-1.5**	-1.9	**-1.0**	-1.7
Estonija	**6.3**	-2.1	**6.7**	10.6	**4.7**	5.0	**-18.5**	-12.1	**2.7**	-1.3
Madžarska	**1.3**	1.1	**7.9**	6.3	**7.4**	8.1	**-6.4**	-6.3	**-5.0**	-3.4
Latvija	**10.3**	-1.5	**10.1**	15.7	**6.0**	6.5	**-22.9**	-14.5	**0.1**	-1.8
Litva	**8.8**	4.3	**5.8**	11.9	**4.3**	4.9	**-15.1**	-13.8	**-1.2**	-1.7
Slovaška	**10.4**	6.8	**1.9**	4.0	**11.1**	9.9	**-5.1**	-5.6	**-1.9**	-2.3
Poljska	**6.6**	5.1	**2.6**	4.3	**9.6**	7.3	**-4.5**	-5.2	**-2.0**	-2.3
Bolgarija	**6.2**	5.8	**7.6**	12.4	**6.9**	6.0	**-22.5**	-23.8	**0.1**	3.0
Romunija	**6.0**	8.0	**4.9**	7.8	**6.4**	6.1	**-13.9**	-13.5	**-2.6**	-3.4

Opomba: Podatki zapisani odebeljeno sivo so napovedi.

Viri: OECD Economic Outlook, Evropska komisija (november 2008), IMF World Economic Outlook (oktober 2008), EUROSTAT, Eastern Europe Consensus (december 2008), Consensus (december 2008)

KONVERGENČNA MERILA ZA PREVZEM EVRA	Število izpolnjenih meril	Stabilnost cen	Javnofinančno stanje		Devizni tečaj	Obrestne mere
		Povprečna inflacija (v %) nov.08	Saldo javnih financ (v % BDP) 2007	Javni dolg (v % BDP) 2007	Sodelovanje v ERM II	Dolgoročna OM (v %) sep.08
Referenčna vrednost		**4.1**	**-3.0**	**60.0**	**2 leti**	**6.31**
Bolgarija	3	12.3	0.1	18.2	ne	5.15
Češka	3	6.5	-1.0	28.9	ne	4.67
Danska	5	3.6	4.5	26.2	od 01.01.1999	4.36
Estonija	3	10.8	2.7	3.5	od 28.06.2004	7.87*
Latvija	4	15.6	0.1	9.5	od 02.05.2005	6.10
Litva	4	11.1	-1.2	17.0	od 28.06.2004	5.27
Madžarska	0	6.4	-5.0	65.8	ne	8.12
Poljska	3	4.3	-2.0	44.9	ne	6.09
Romunija	2	7.9	-2.6	12.9	ne	7.59
Slovaška	5	3.8	-1.9	29.4	od 28.11.2005	4.71
Švedska	4	3.4	3.6	40.4	ne	4.03
Velika Britanija	4	3.5	-2.8	44.2	ne	4.61
Slovenija	4	5.9	0.5	23.4	od 28.06.2004 do 31.12.2006	4.61
Ciper	4	4.5	3.5	59.5	od 02.05.2005 do 31.12.2007	4.60
Malta	4	4.5	-1.8	62.2	od 02.05.2005 do 31.12.2007	4.86
EU-15		3.4***	-0.6	66.3		4.50
EU-27		3.7***	-0.9	58.7		5.04

Vir: EUROSTAT in ECB.

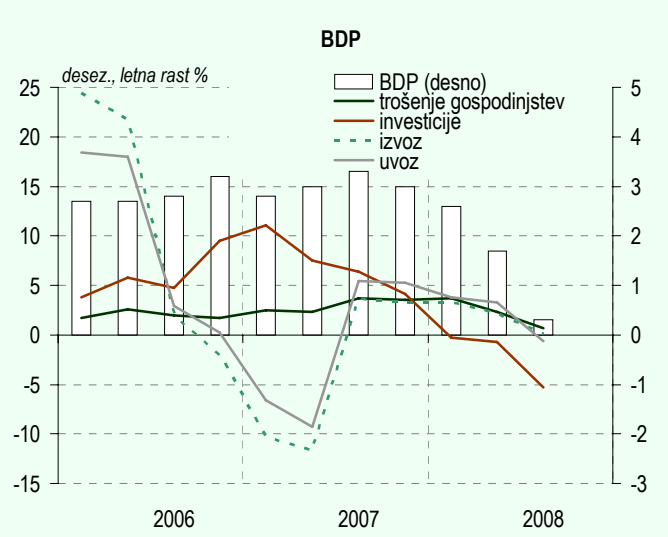
Opombe: S sivim ozadjem je označeno izpolnjevanje konvergenčnih kriterijev. Povprečna inflacija in dolgoročna obrestna mera sta izračunani na podlagi povprečja zadnjih 12 mesecev. Pri dolgoročni OM so v agregatih EU-15 in EU-27 upoštevani le tisti podatki, ko so na voljo.

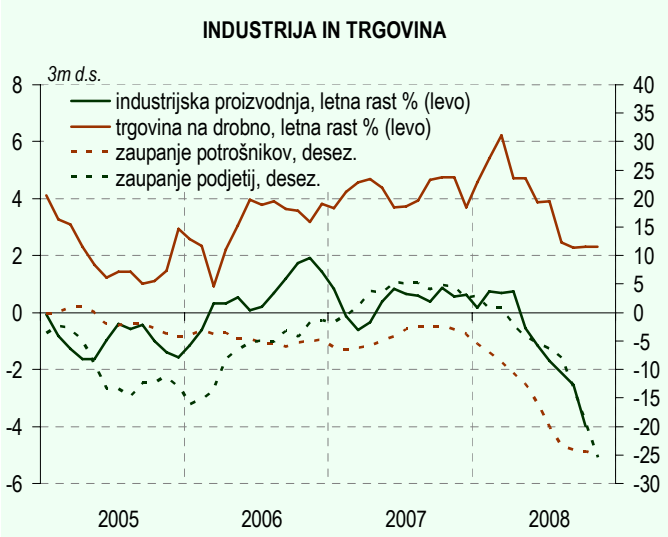
* Podatek za predhodni mesec

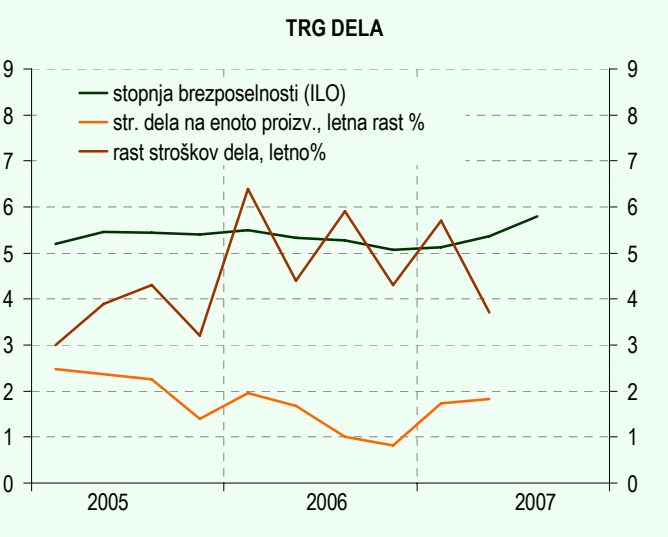
** Ocena BS.

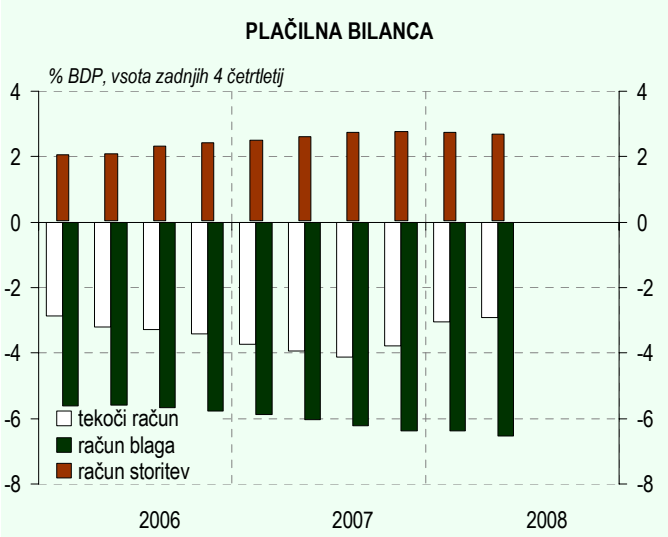
*** Ocena Eurostata

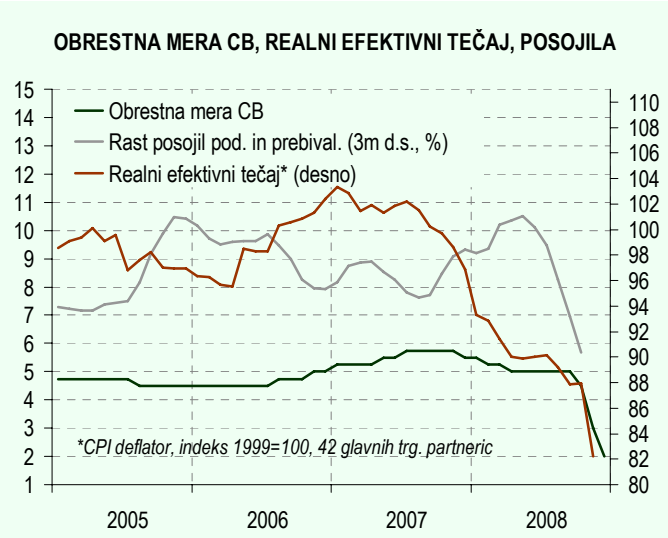
Velika Britanija

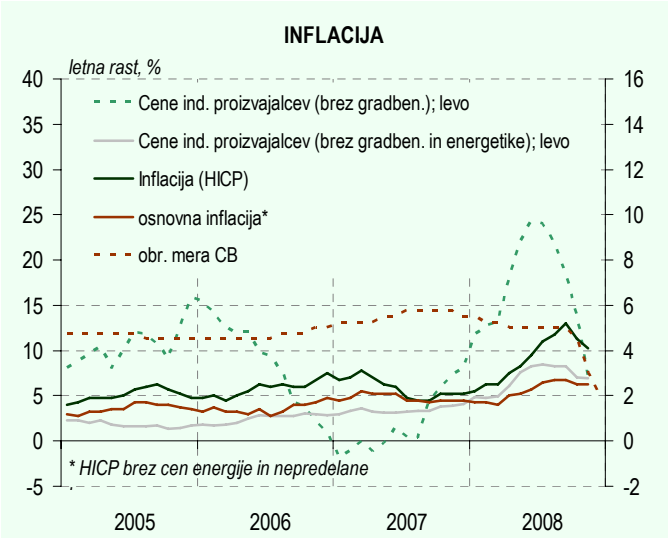






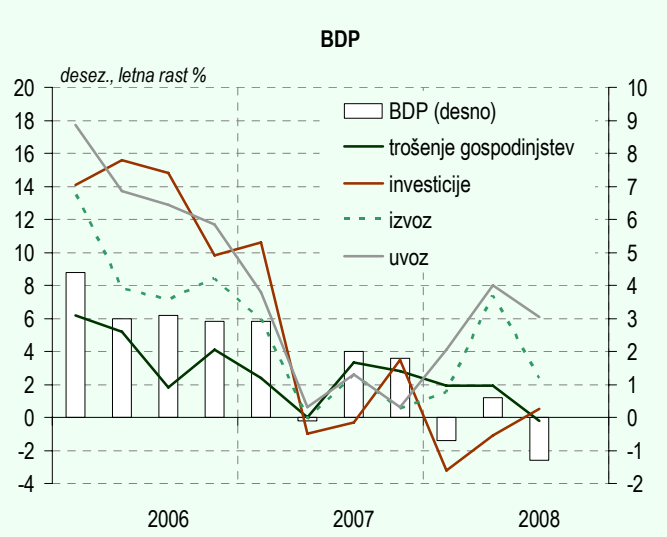


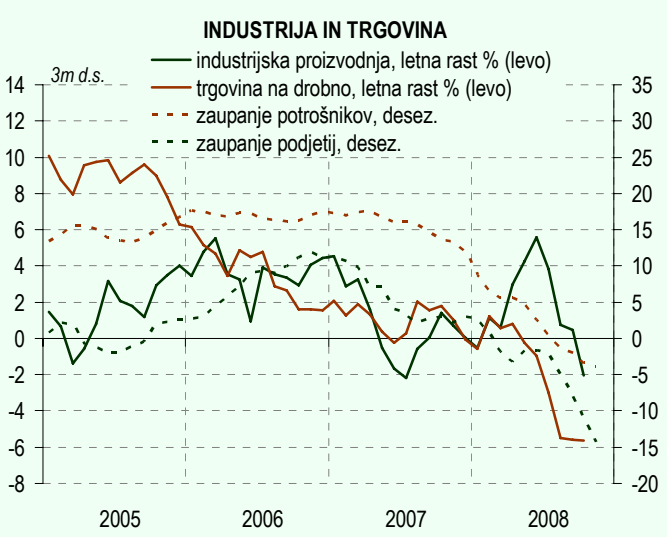


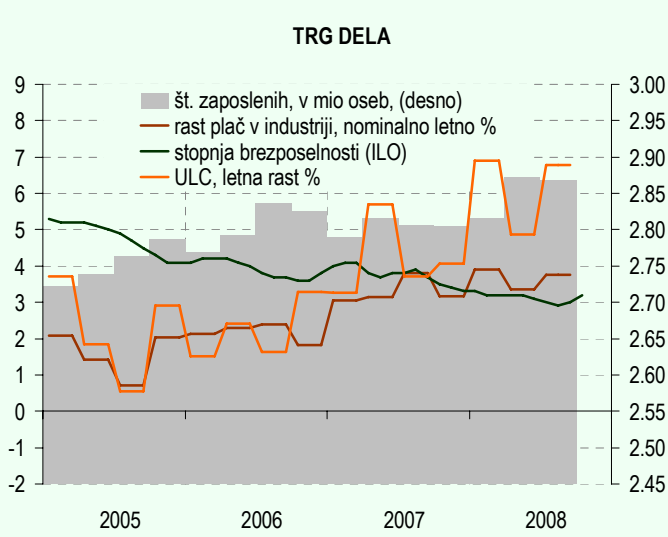


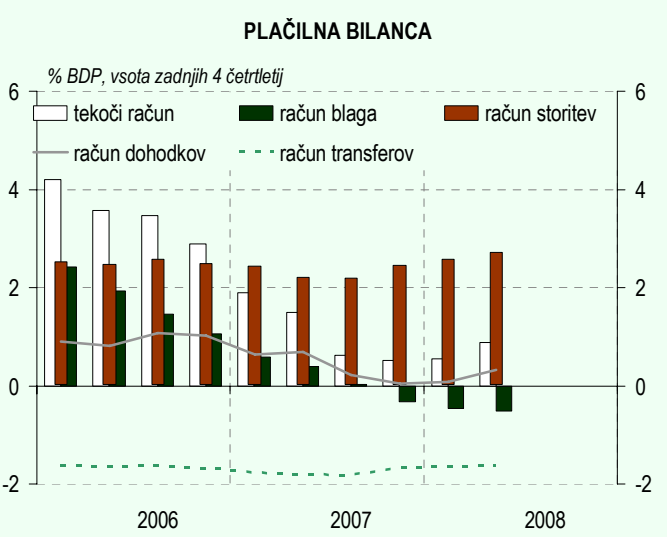
Viri: Eurostat, ECB, Bank of England (obrestna mera, str. dela na enoto proizvoda, posojila)

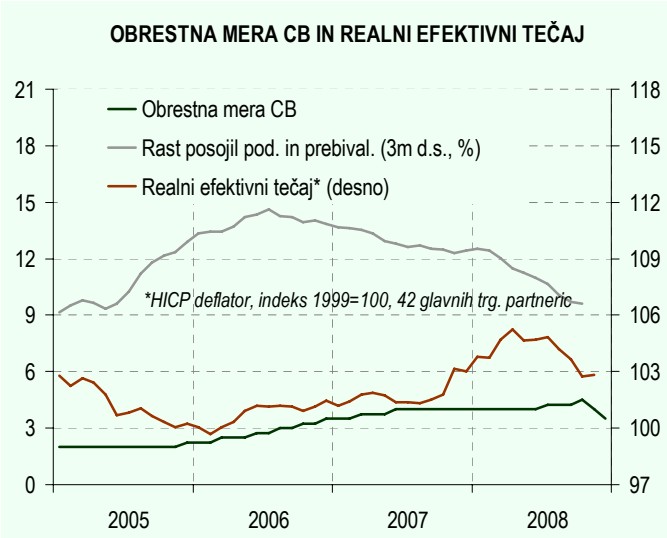
Danska

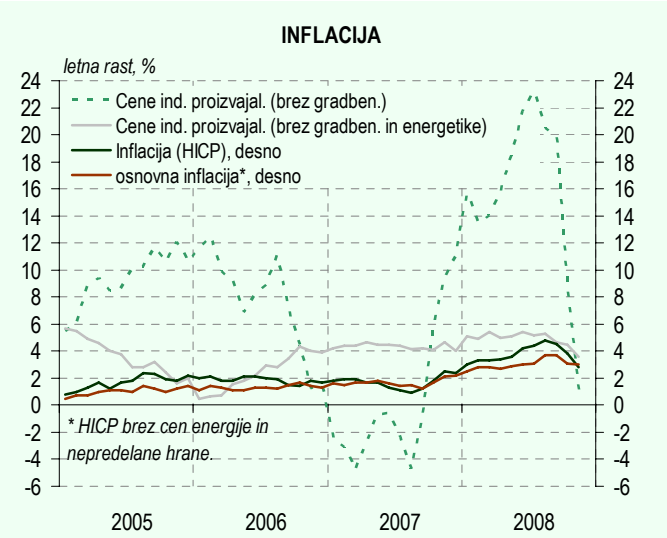






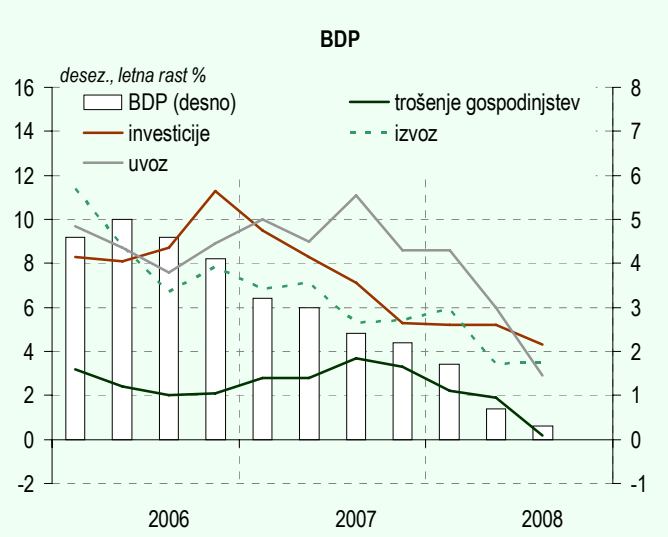


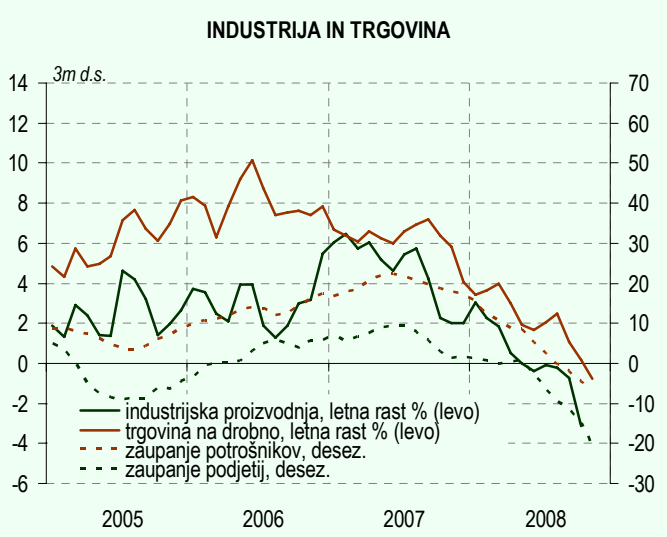


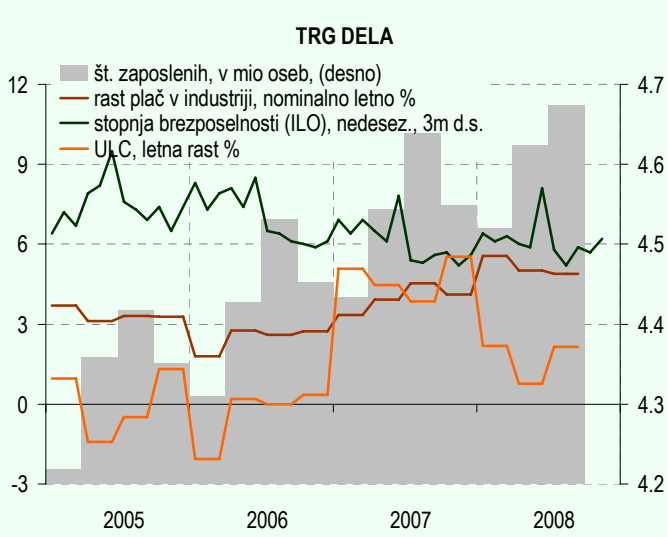


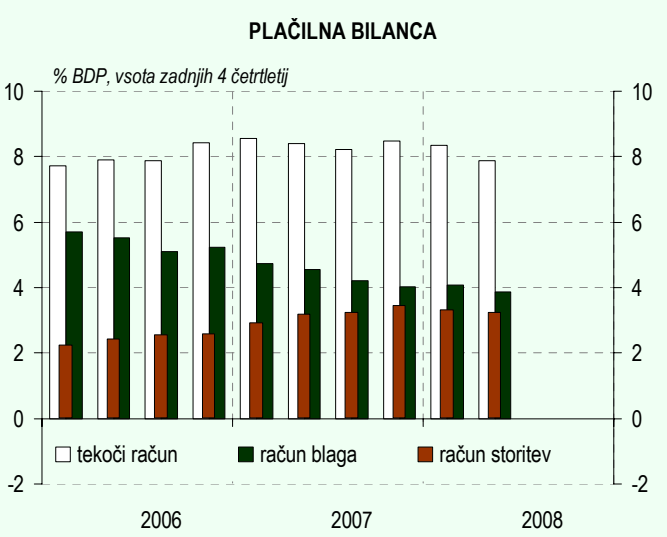
Viri: Eurostat, ECB, Danmarks Nationalbank (obrestna mera)

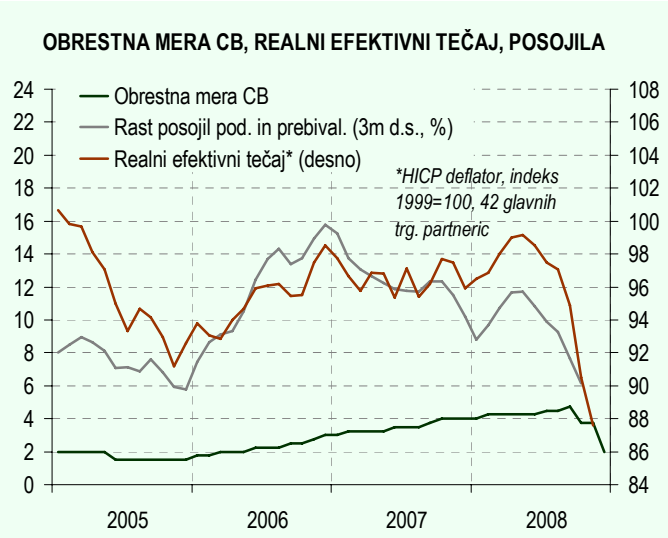
Švedska

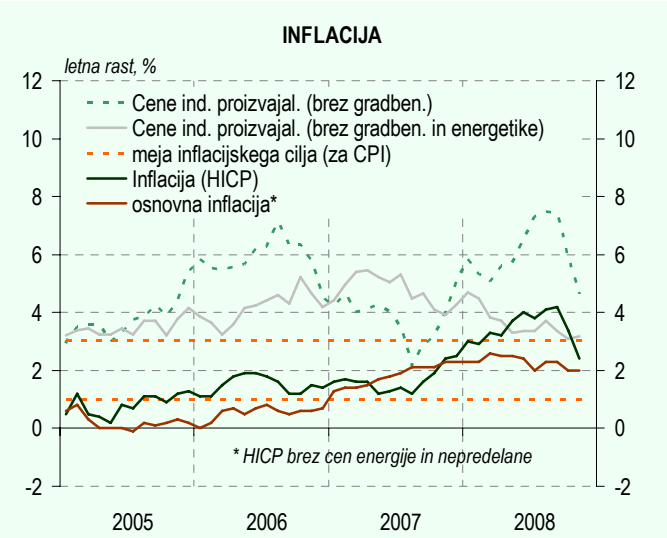






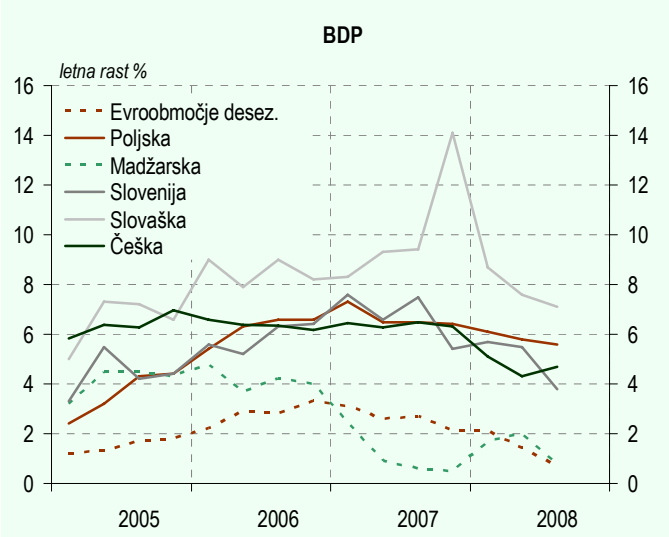


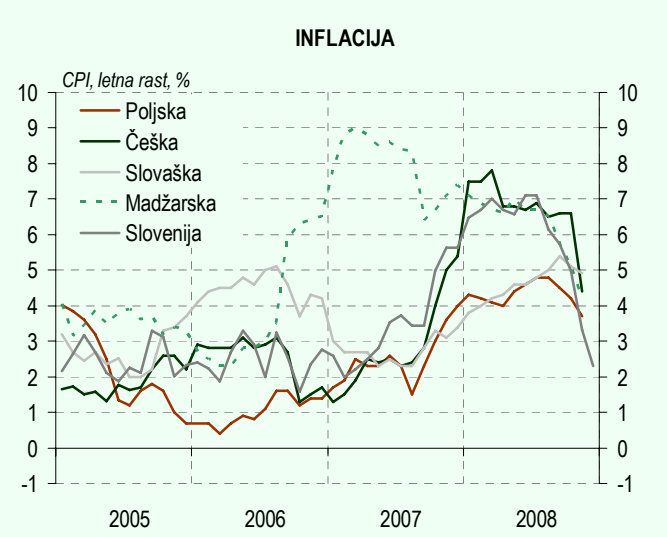


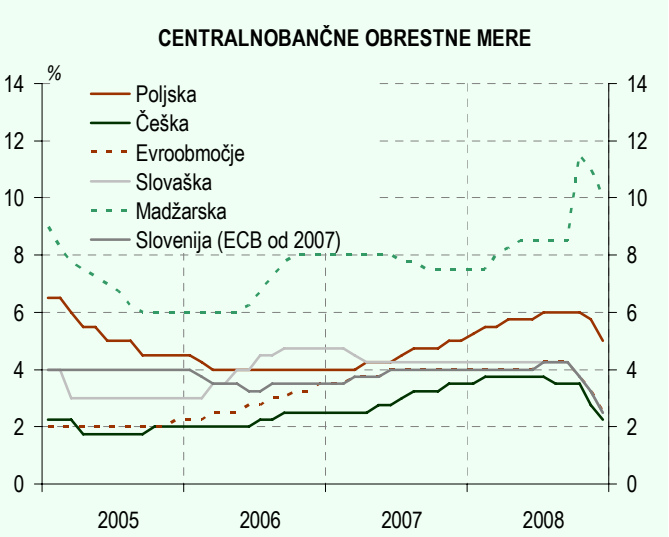


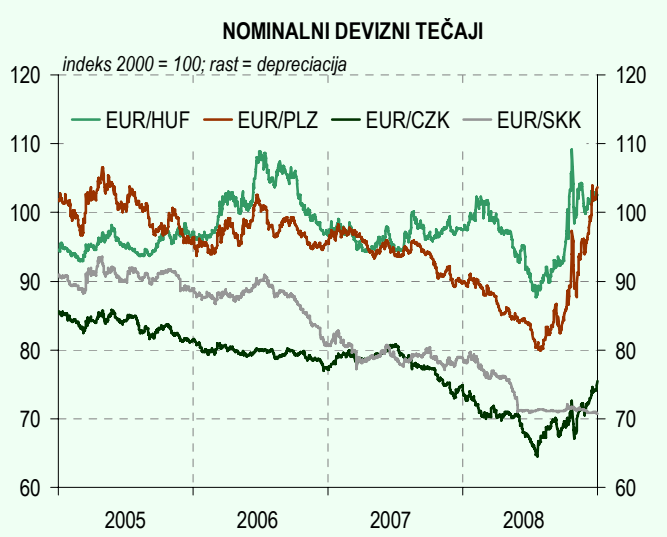
Viri: Eurostat, ECB, Sveriges Riksbank (obrestna mera)

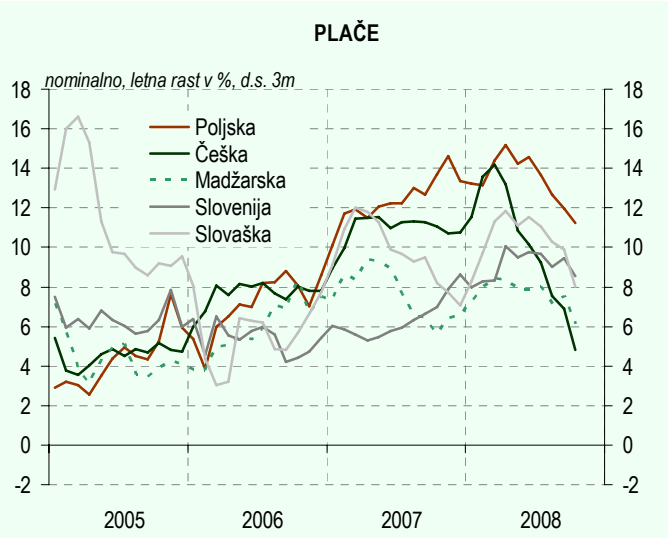
Nekatere nove članice EU

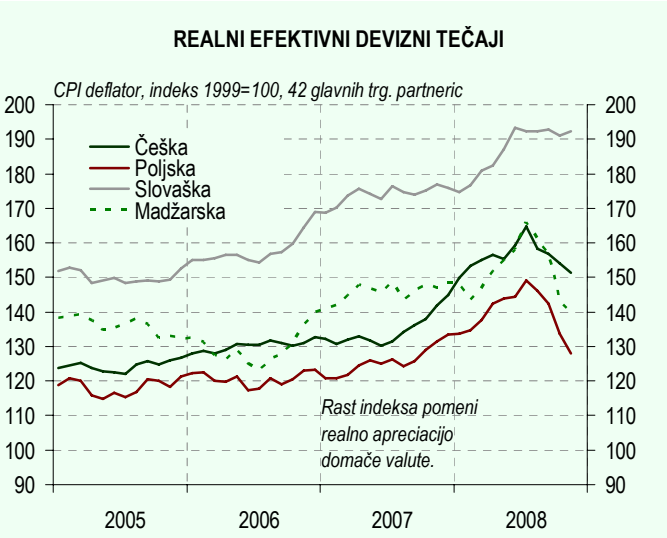






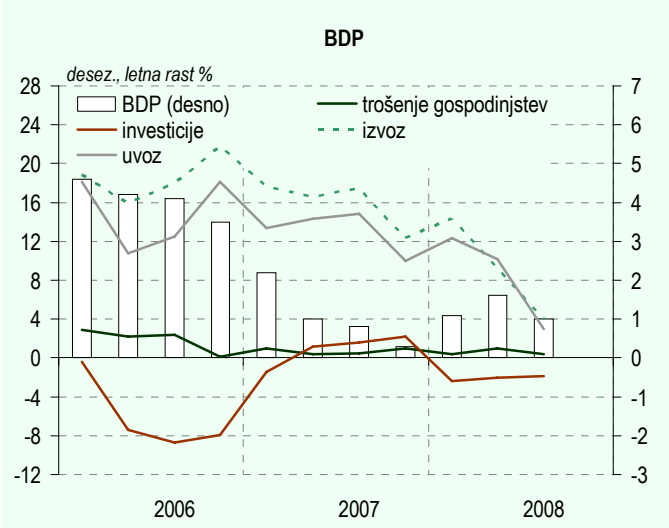


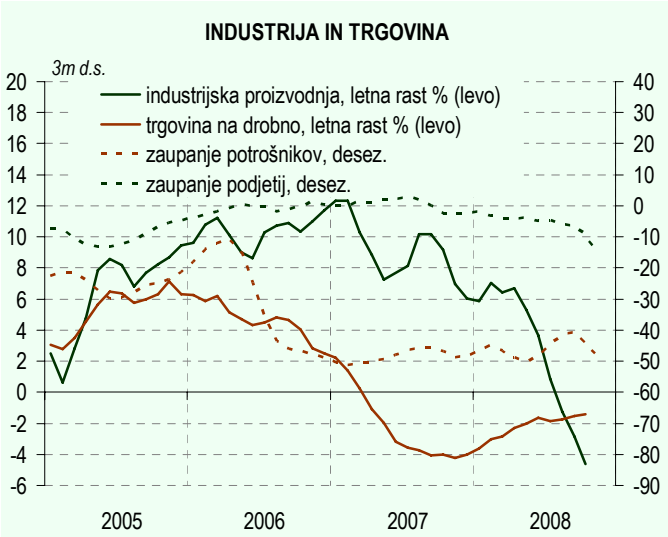


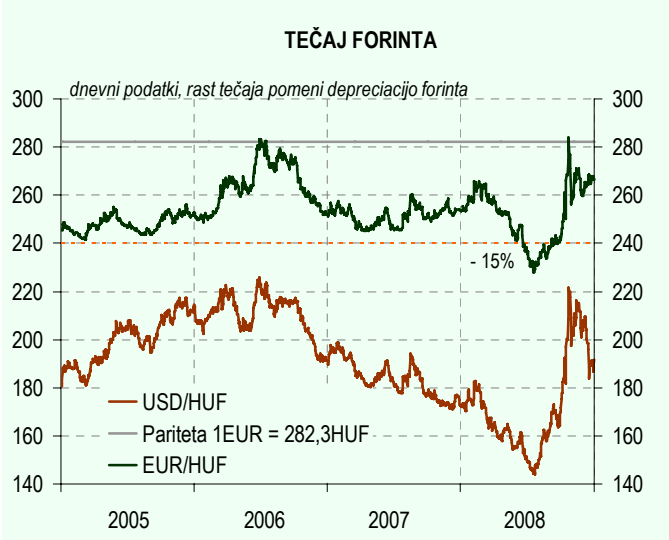


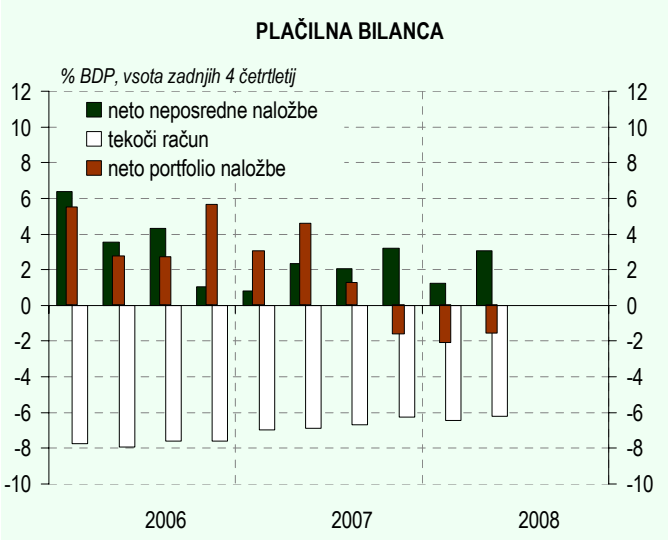
Viri: Eurostat (plače), ECB (devizni tečaji), statistični uradi držav (BDP, CPI), centralne banke držav (obrestne mere)

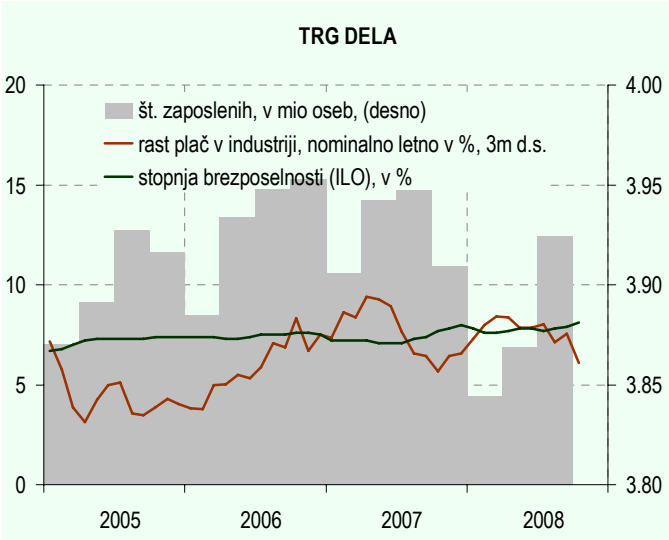
Madžarska

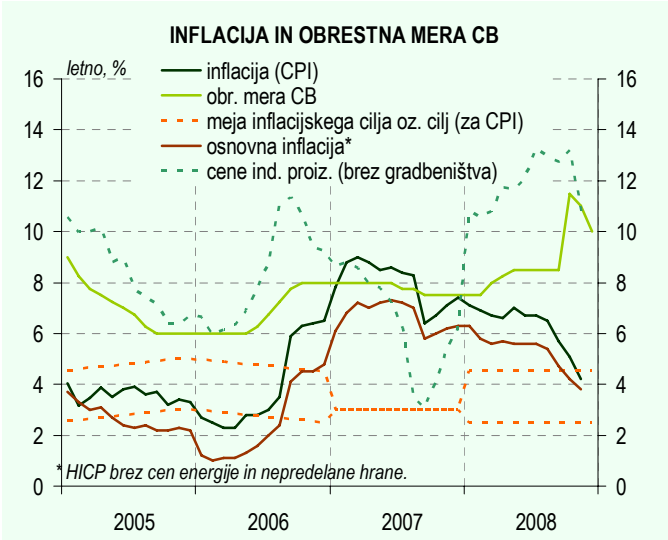






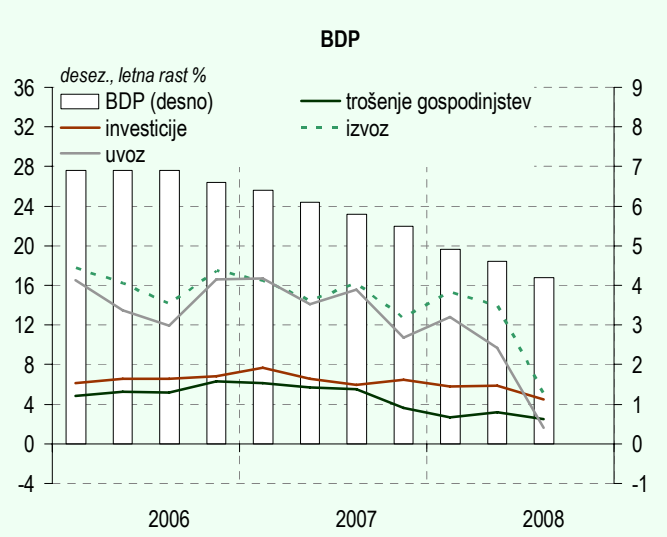


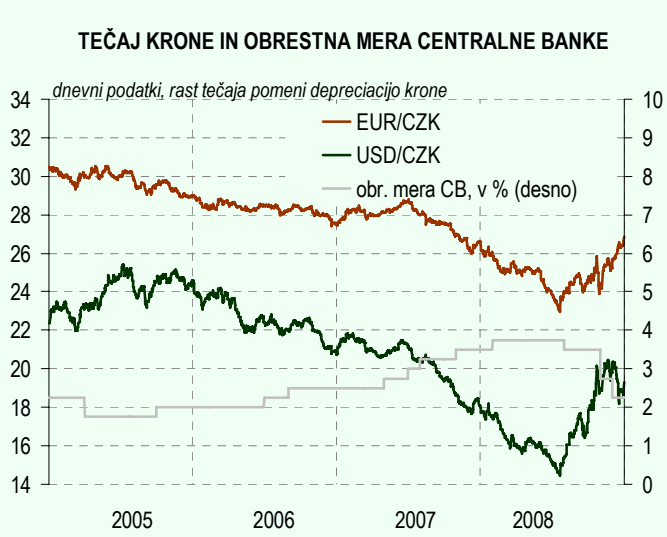


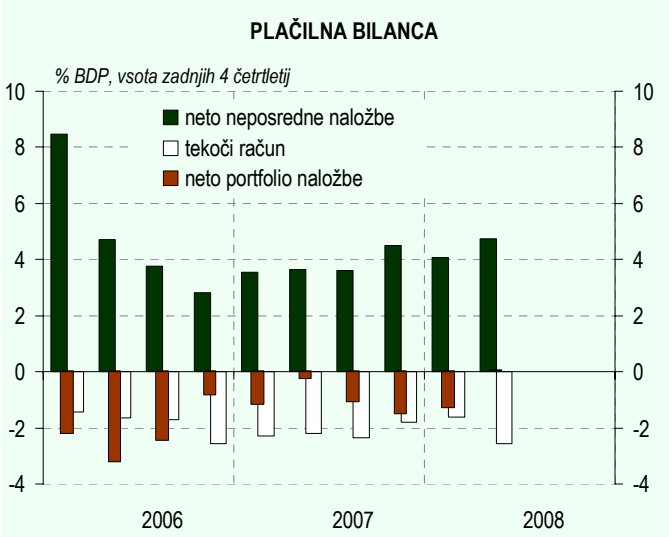


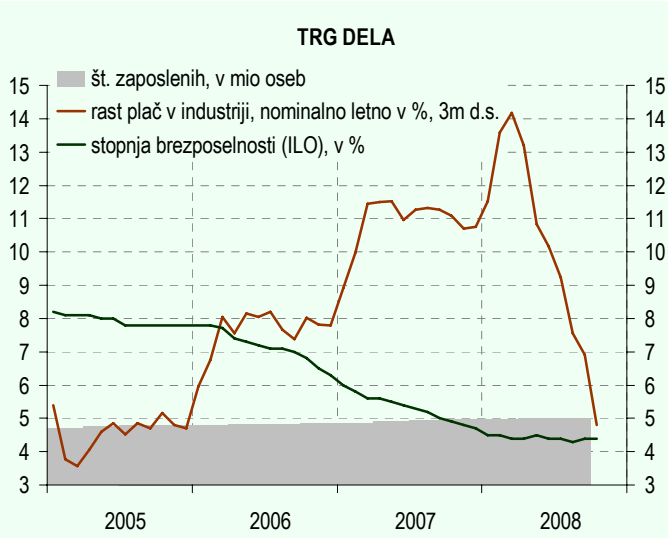
Viri: Eurostat, ECB, Magyar Nemzeti Bank (obrestna mera), Hungarian Central Statistical Office (inflacija CPI, industrijska proizvodnja)

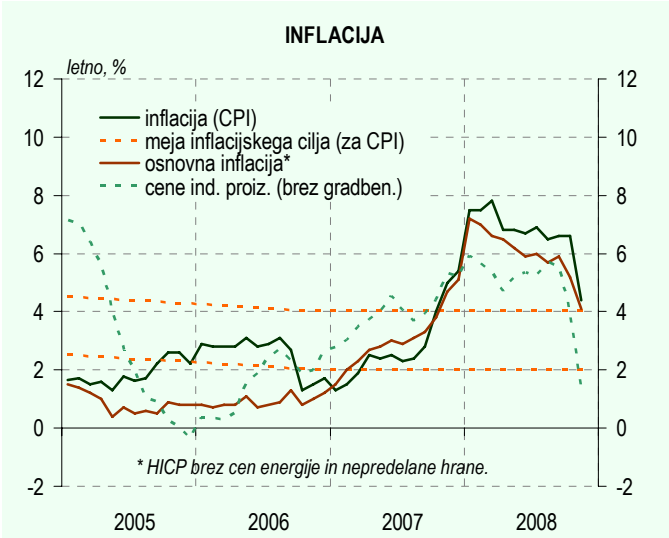
Češka





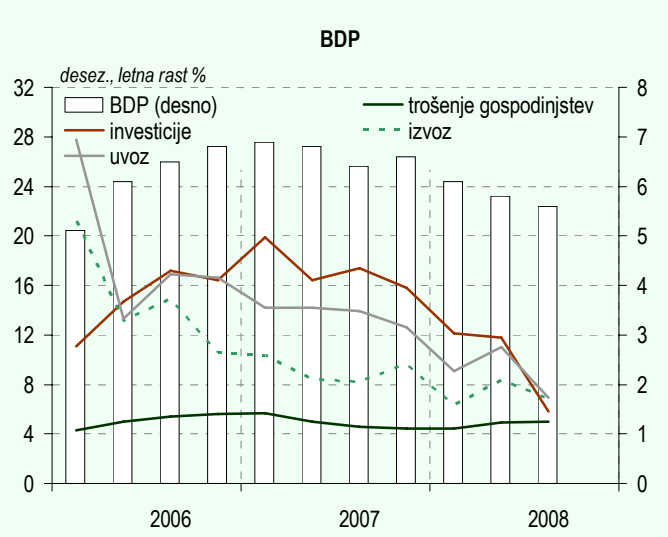


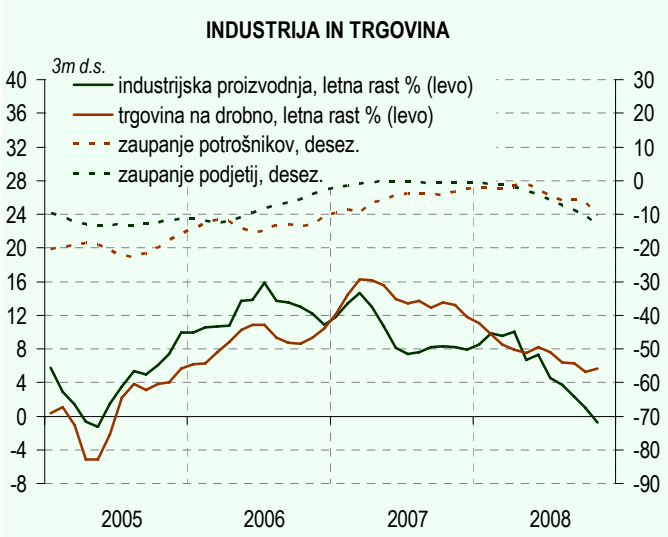


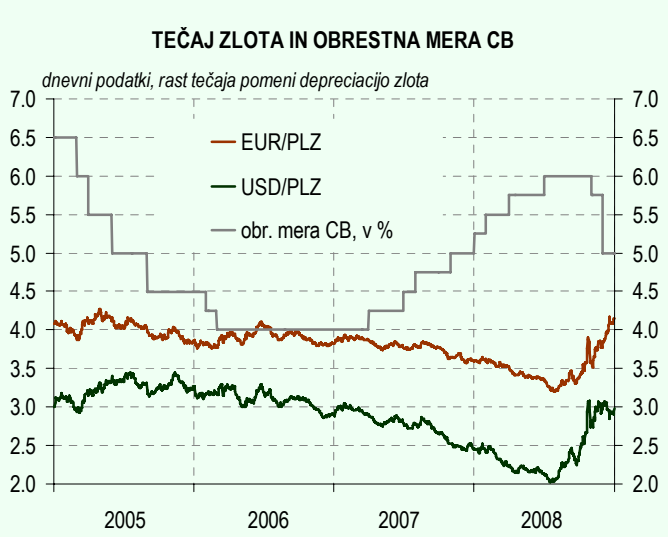


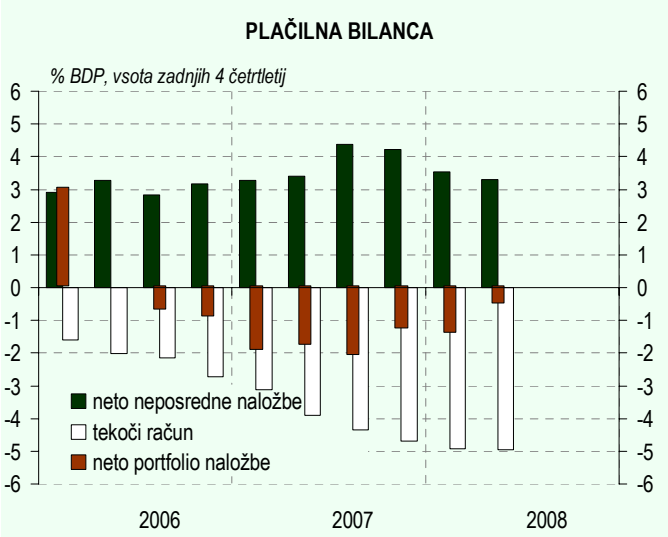
Viri: Eurostat, ECB, Czech Statistical Office (inflacija CPI), Czech National Bank (obrestna mera)

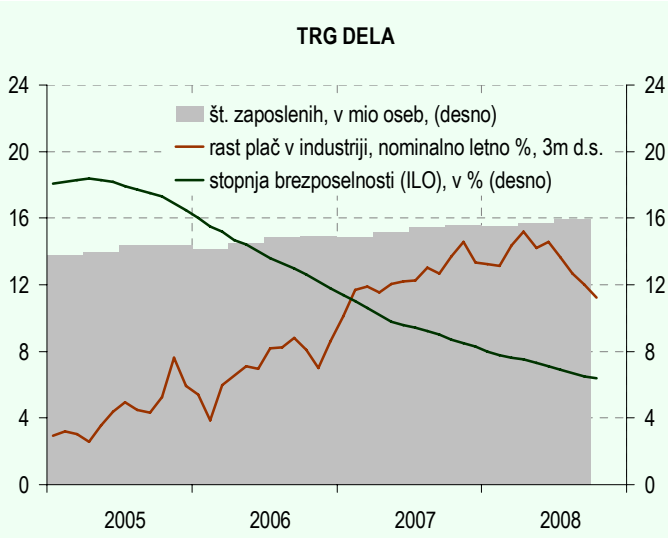
Poljska

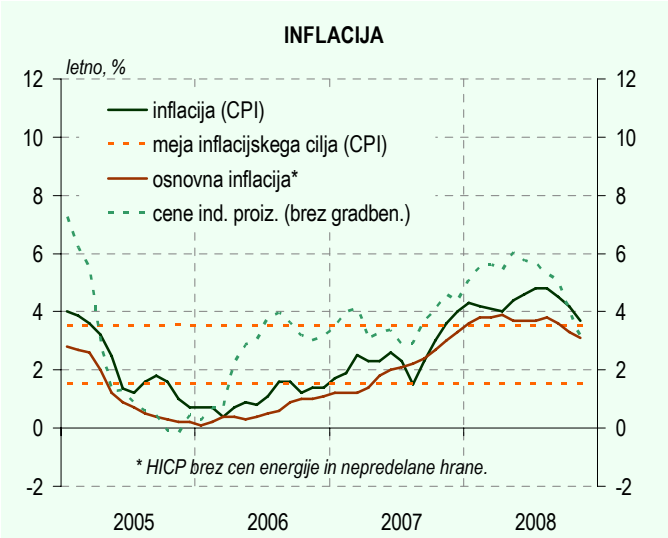






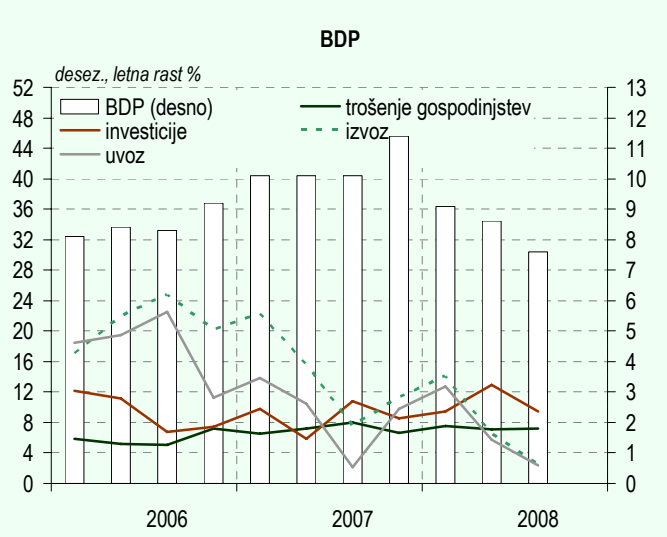


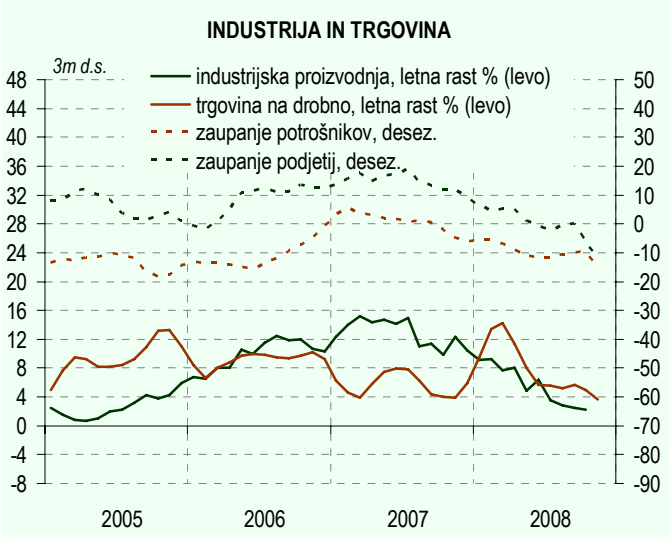


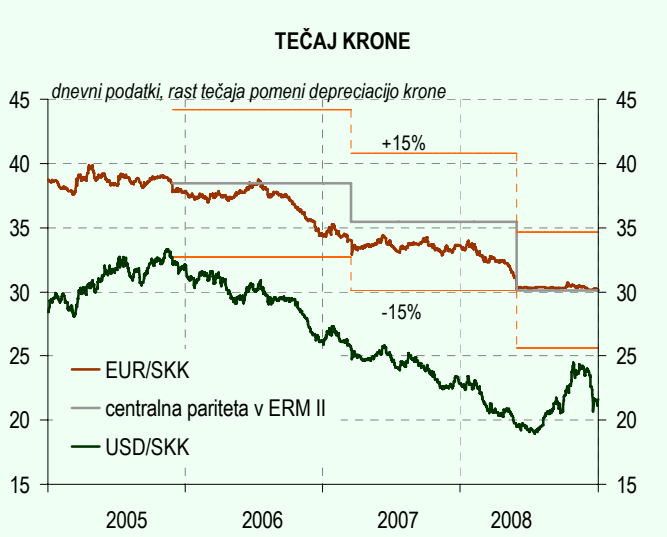


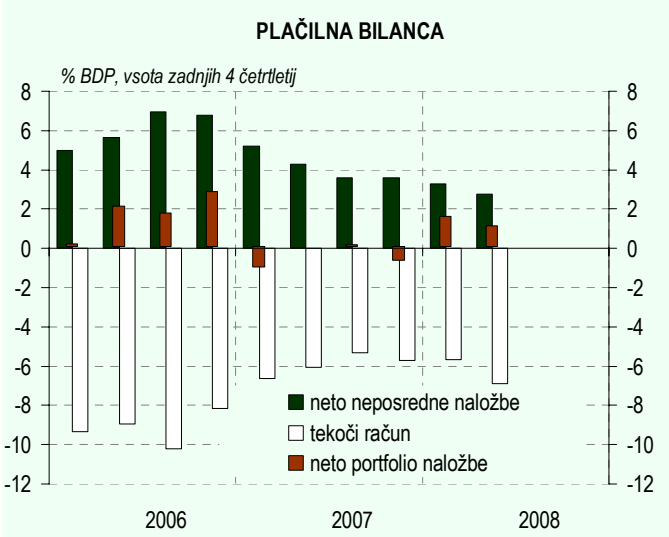
Viri: Eurostat, ECB, National Bank of Poland (obrestna mera), Central Statistical Office of Poland (inflacija CPI)

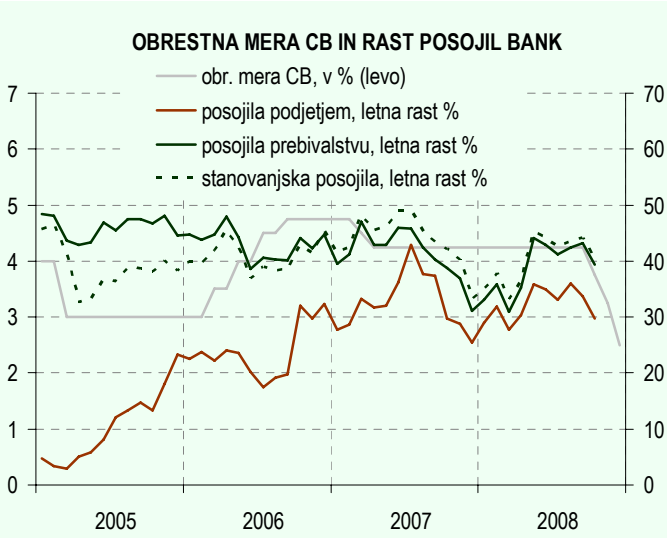
Slovaška

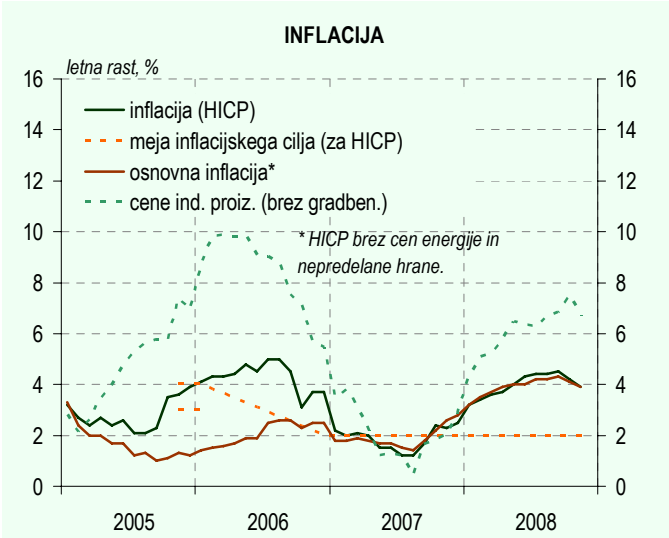








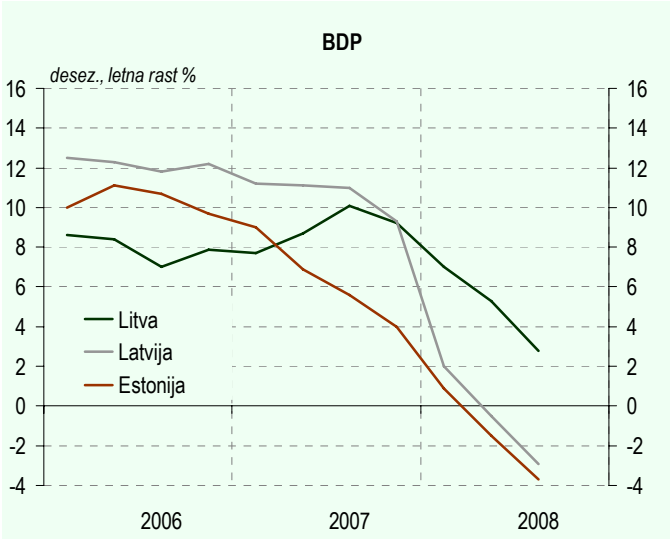


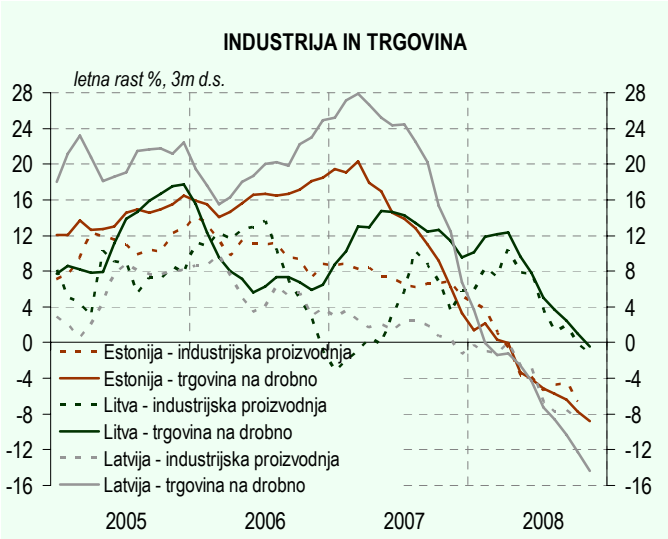


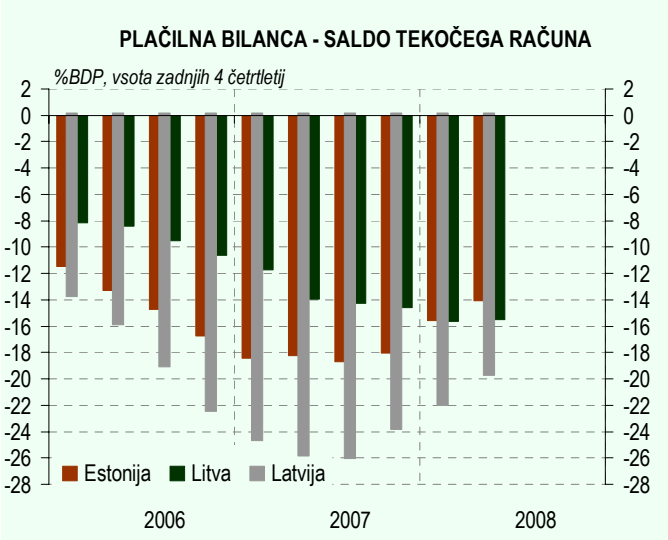
Viri: Eurostat, ECB, National Bank of Slovakia (obrestna mera)

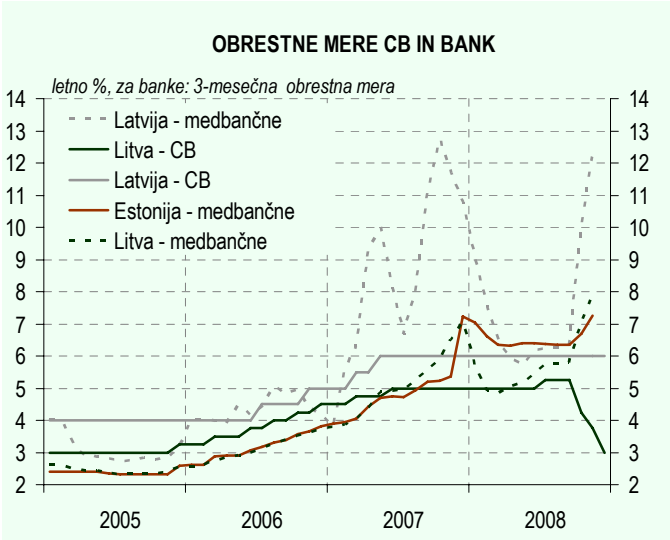
V skupnem dogovoru med Slovaško in ECB je z 29. majem prišlo do revalvacije centralne paritete znotraj mehanizma deviznih tečajev ERM II med slovaško krono in evrom v višini 17,6472%. Nova pariteta znaša 30,1260 slovaške krone za 1 evro. Dovoljen razpon nihanja okoli centralne paritete ostaja 15%.

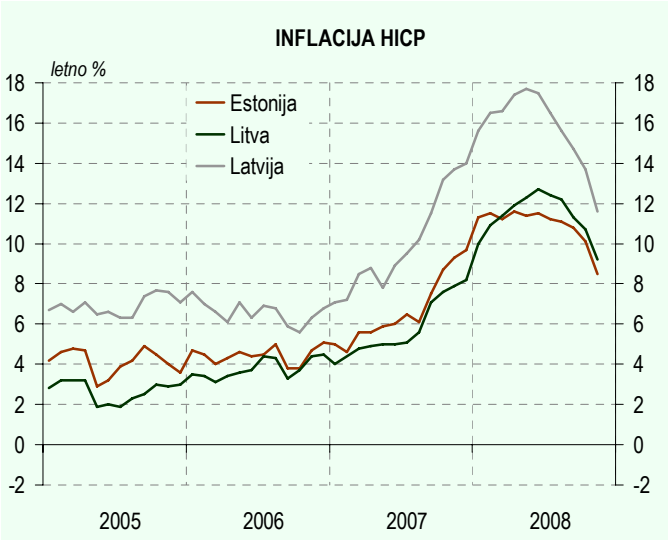
Baltske države





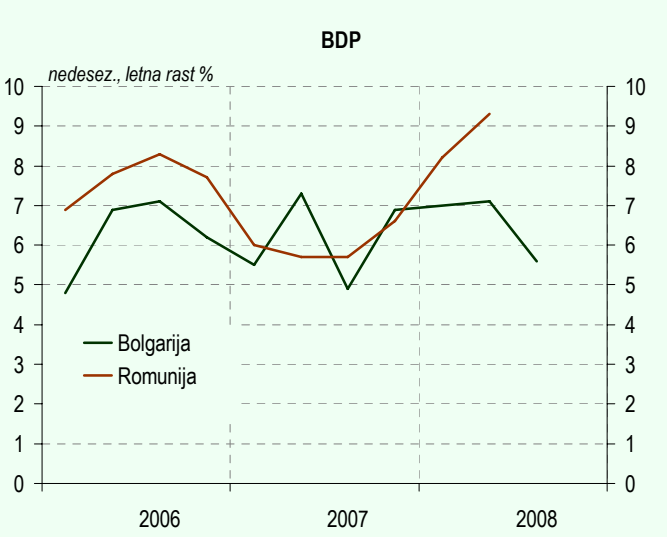


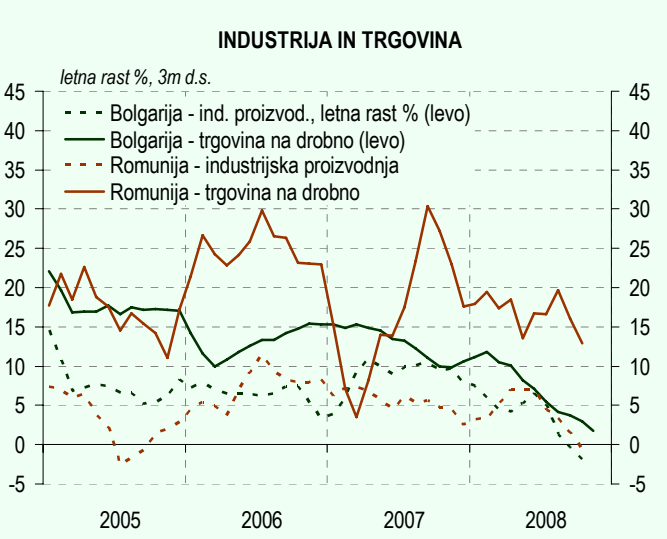


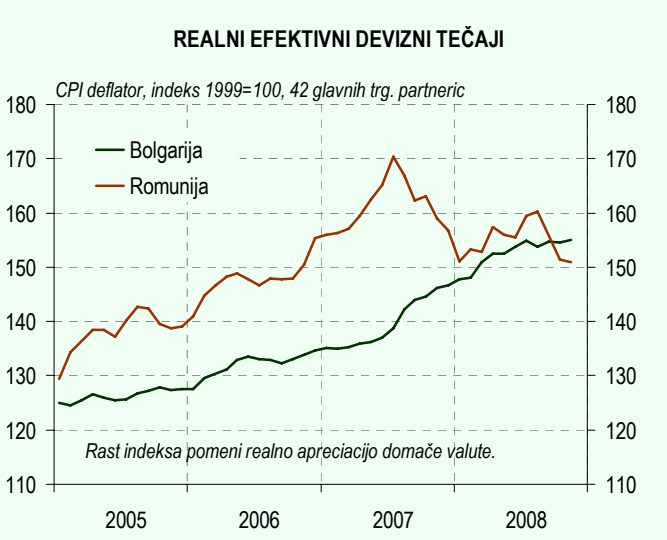


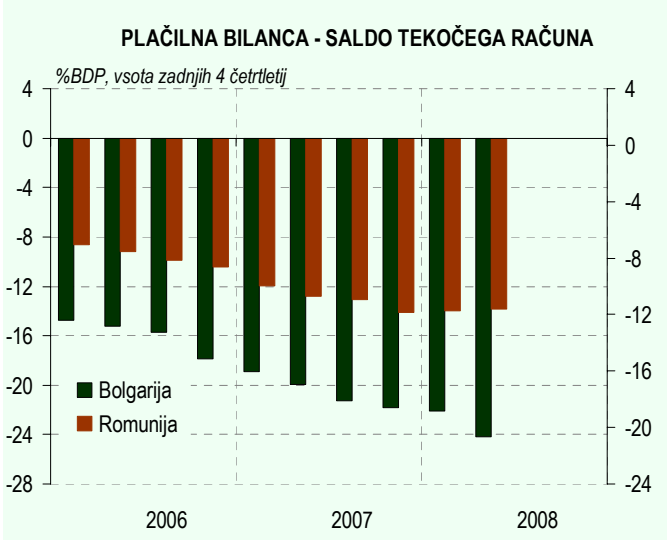
Viri: Eurostat, ECB, centralne banke držav (obrestne mere)

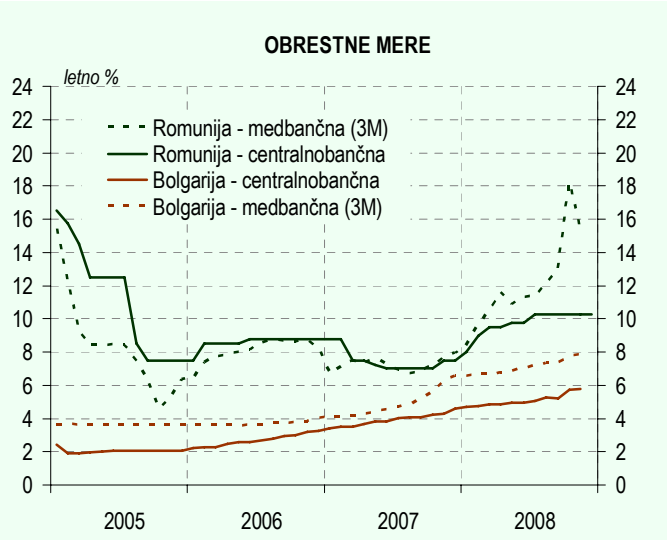
Bolgarija in Romunija

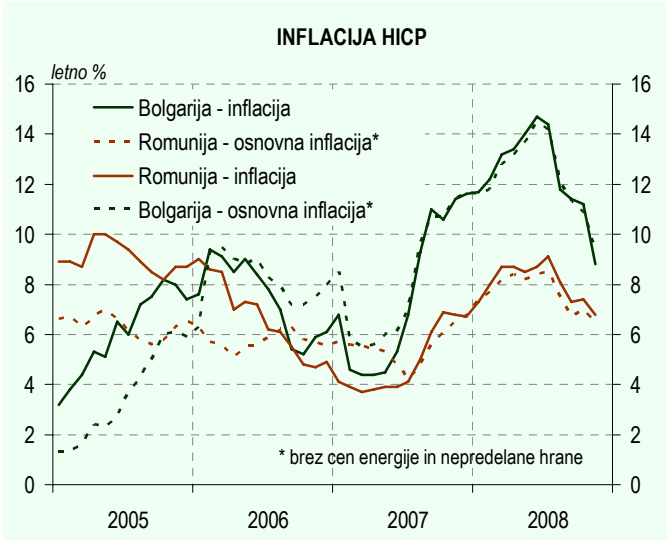












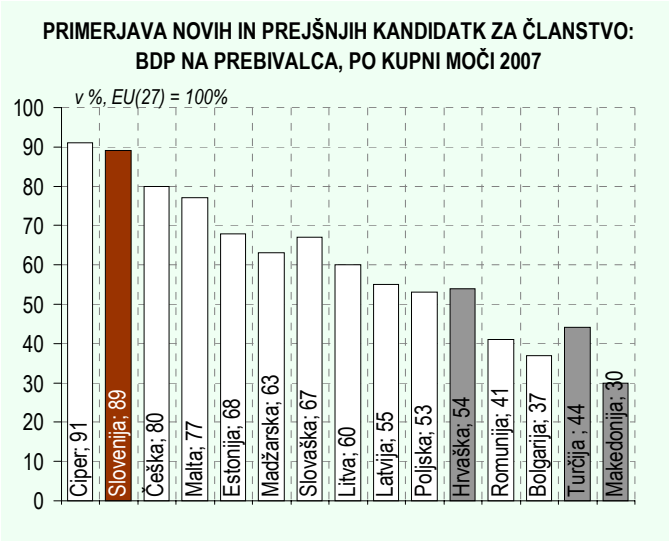
Viri: Eurostat, ECB, centralni banki držav (obrestne mere), statistična urada držav (BDP)

Države jugo-vzhodne Evrope

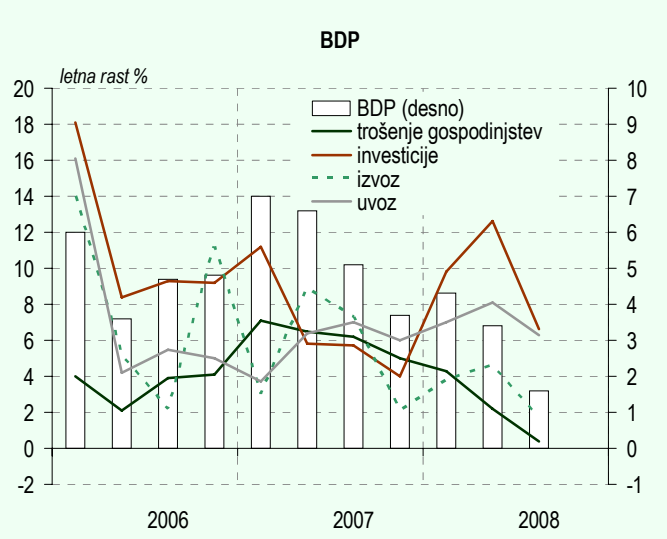
	BDP		Inflacija		Brezposelnost		Tekoči račun		Saldo javnih financ	
	2007	2008	2007	2008	2007	2008	2007	2008	2007	2008
DRŽAVE KANDIDATKE ZA EU							(v % BDP)		(v % BDP)	
Hrvaška	5.6	3.4	2.9	6.2	9.6	9.2	-8.6	-10.5	-1.6	-2.0
Makedonija	5.0	5.5	2.3	8.5	34.9	34.8	-3.0	-14.0	0.6	-1.5
Turčija	4.6	1.6	8.8	10.5	8.5	8.8	-5.7	-6.5	-1.2	-1.3
DRŽAVE NEKDANJE JUGOSLAVIJE										
Bosna in Hercegovina	5.8	5.5	1.5	7.4	30.0	30.0	-13.0	-16.0	*0,6	*-1,2
Črna Gora	7.5	7.2	3.5	9.2	30.0	30.0	-39.6	-39.6	*0,0	*0,0
Srbija	7.1	6.0	6.7	10.9	22.0	23.0	-15.9	-18.6	-2,0	-2,0

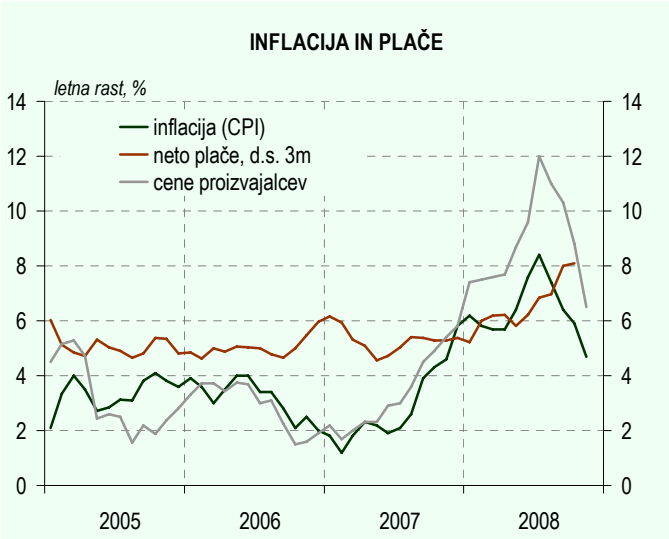
Opombe: Podatki zapisani odebeljeno sivo so napovedi. * Podatki se nanašajo na državni proračun (Central Government).

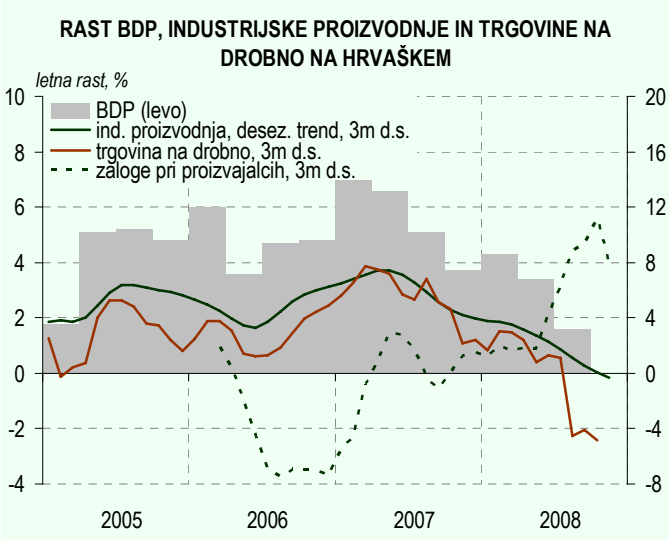
Viri: Evropska komisija (november 2008), IMF World Economic Outlook (oktober 2008), JP Morgan, WIIW Research Reports (julij 2007), Evropska komisija CCEQ, IMF: Republic of Croatia, 2008 Article IV Consultation, Eastern Europe Consensus (december 2008)

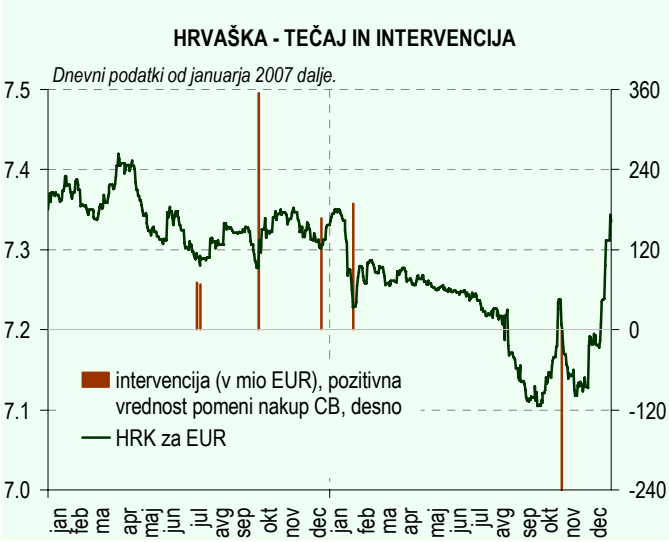


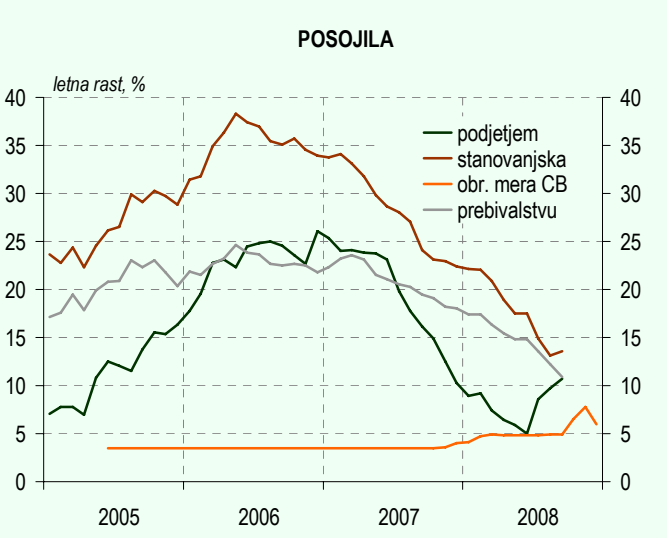
Hrvaška

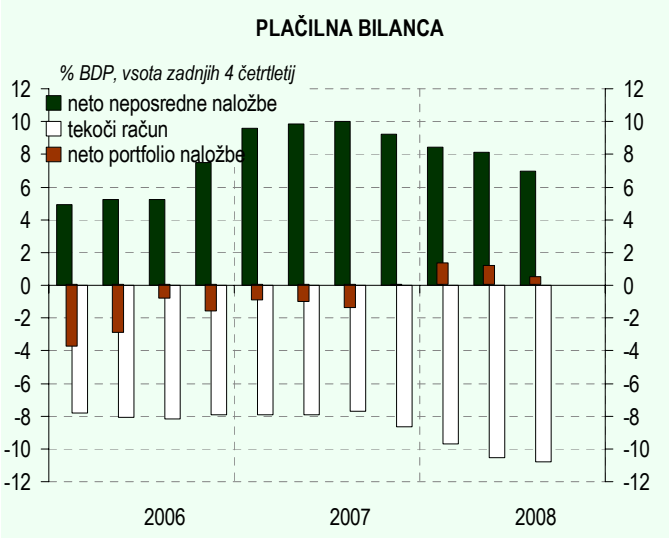






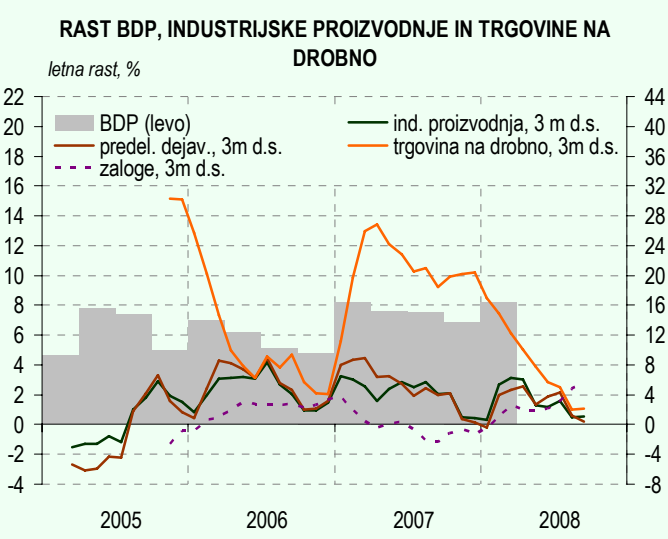


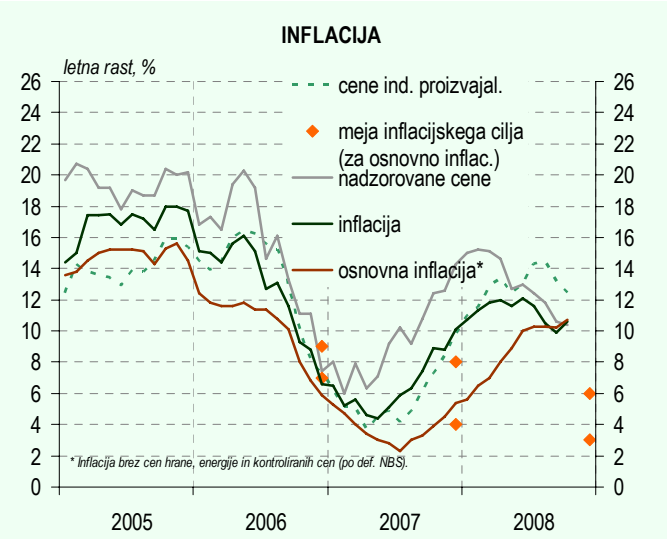


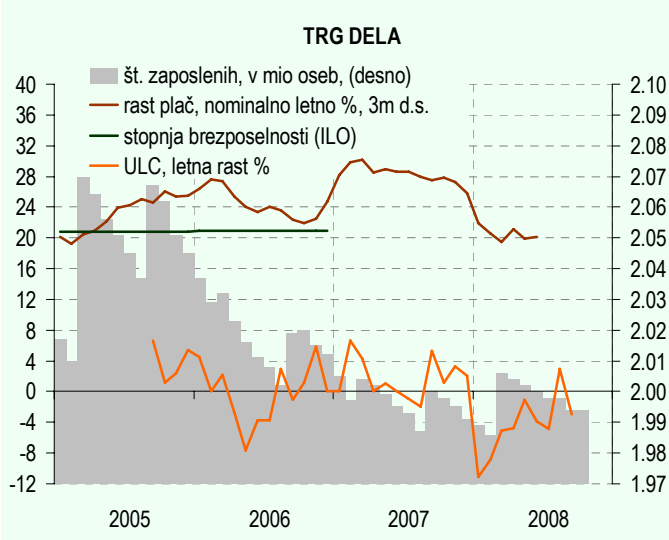


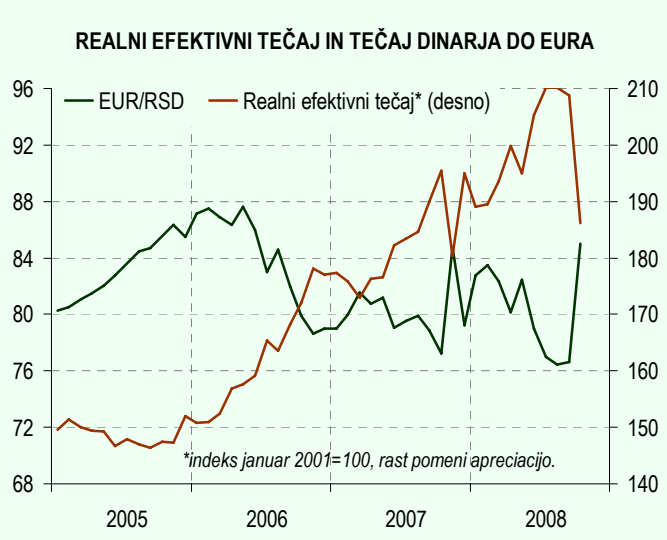
Viri: Hrvatska Narodna Banka (tečaj in intervencija, obrestna mera, posojila), IMF SDDS (plačilna bilanca), Državni zavod za statistiku Republike Hrvatske (vse ostalo)

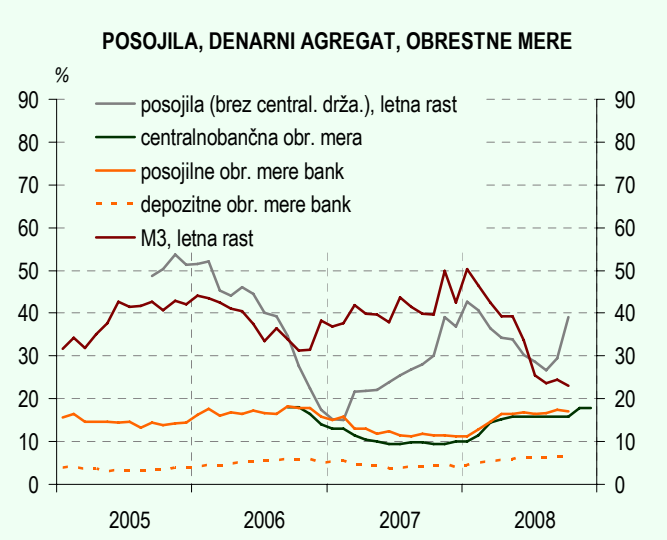
Srbija

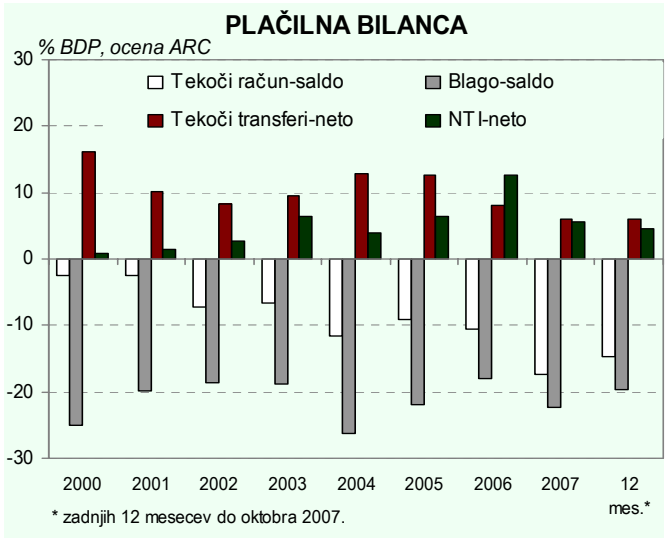






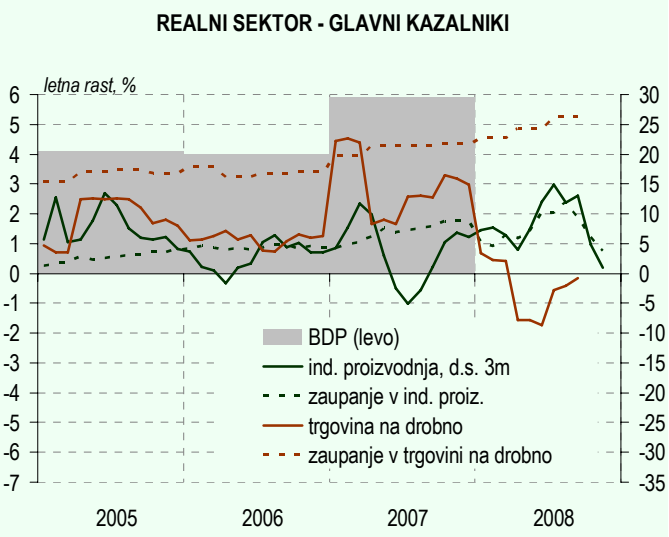


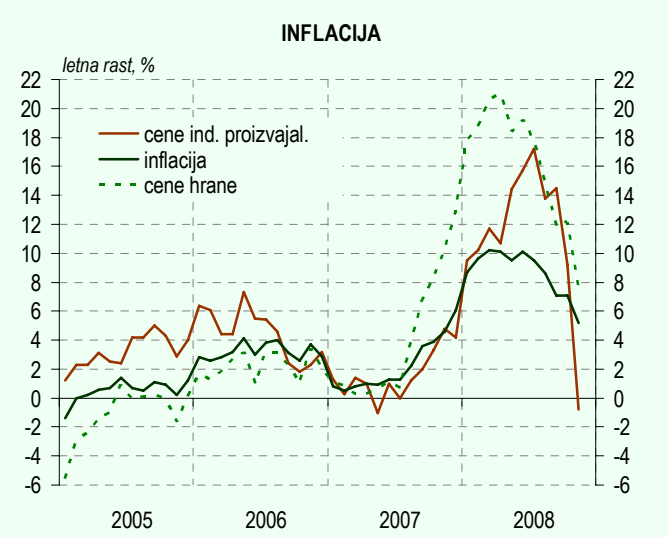


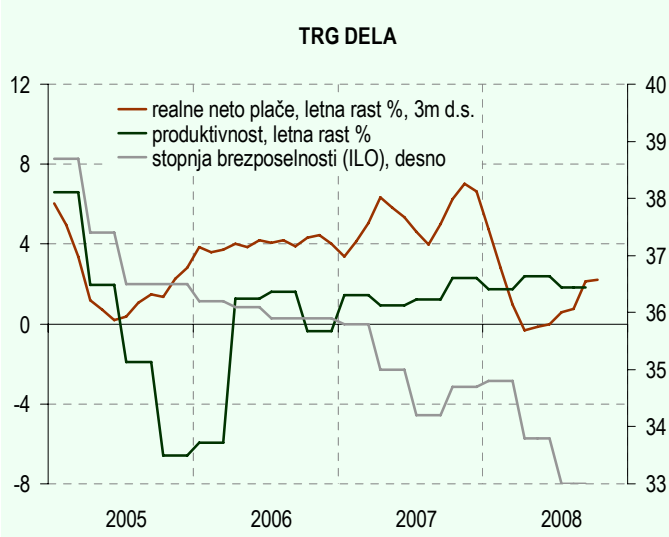


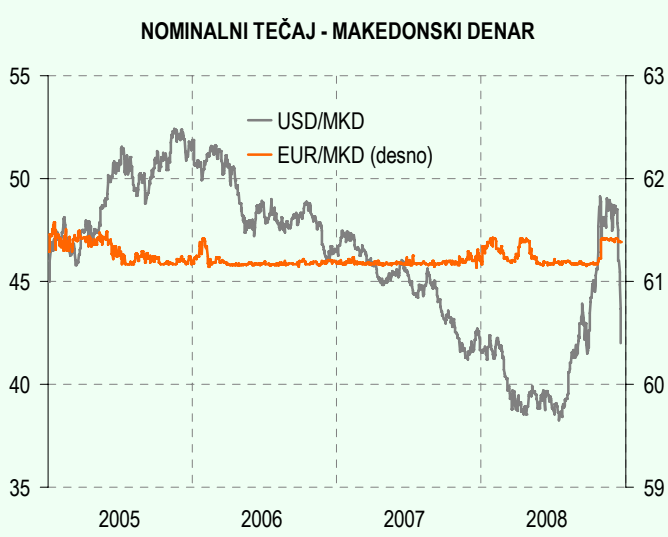
Viri: Republički zavod za statistiku Republike Srbije, Narodna banka Srbije

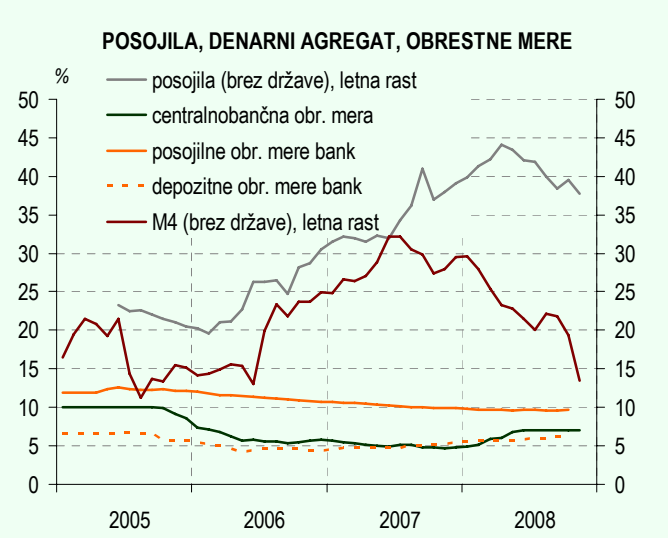
Makedonija

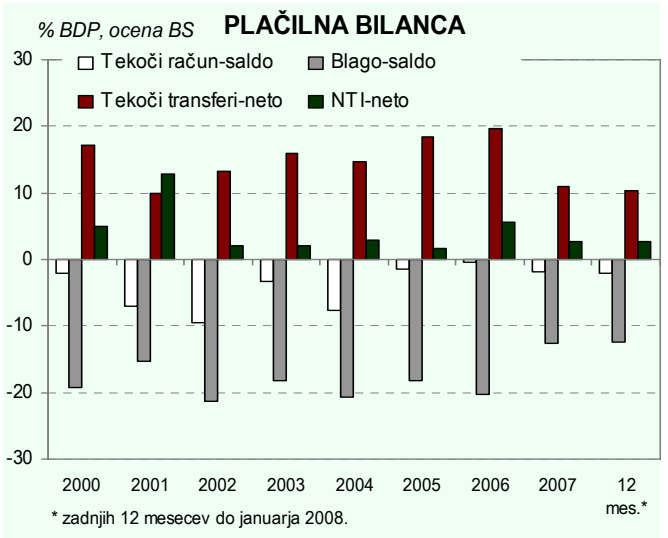












Viri: National Bank of the Republic of Macedonia, State Statistical Office of the Republic of Macedonia

Ukrepi centralnih bank

KLJUČNA OBR. MERA CENTRALNE BANKE	*obr. mera*	*(zadnja sprememba)*	*obr. mera (31.12.2005)*
Amerika			
ZDA	0,0 - 0,25%	(16.12.2008, ↓ 0,875)	4,25%
Kanada	1,50%	(09.12.2008, ↓ 0,75)	3,25%
Brazilija	13,75%	(10.09.2008, ↑ 0,75)	18,00%
Mehika	8,25%	(15.08.2008, ↑ 0,25)	8,25%
Čile	8,25%	(04.09.2008, ↑ 0,50)	4,50%
Evropa			
Evroobmočje	2,50%	(04.12.2008, ↓ 0,75)	2,25%
Velika Britanija	2,00%	(04.12.2008, ↓ 1,00)	4,50%
Švedska	2,00%	(04.12.2008, ↓ 1,75)	1,50%
Norveška	3,00%	(17.12.2008, ↓ 1,75)	2,25%
Danska	3,50%	(05.12.2008, ↓ 0,50)	2,25%
Češka	2,25%	(17.12.2008, ↓ 0,50)	2,00%
Poljska	5,00%	(23.12.2008, ↓ 0,75)	4,50%
Madžarska	10,00%	(22.12.2008, ↓ 0,50)	6,00%
Slovaška	2,50%	(10.12.2008, ↓ 0,75)	3,00%
Litva	3,00%	(10.12.2008, ↓0,75)	3,25%
Latvija	6,00%	(18.05.2007, ↑ 0,50)	4,00%
Estonija			valutni odbor, vezava na EUR
Hrvaška*			
diskontna obrestna mera	9,00%	(31.12.2007, ↑ 4,50)	4,50%
obratni repo	6,00%	(17.12.2008, ↑ 1,75)	3,50%
Švica	0,50%	(11.12.2008, ↓ 0,50)	1,00%
Turčija	15,00%	(18.12.2008, ↓ 1,25)	13,50%
Azija/ Pacifik			
Avstralija	4,25%	(02.12.2008, ↓ 1,00)	5,50%
Japonska	0,10%	(19.12.2007, ↓ 0,20)	0,001%
Kitajska	5,34%	(23.12.2008, ↓ 0,27)	5,58%
Indija	6,50%	(08.12.2008, ↓ 1,00)	5,25%
Rusija	6,75%	(28.11.2008, ↑ 1,00)	12,00%

Opomba: *Ključna centralnobančna obrestna mera je uradno diskontna obrestna mera, banke pa svoje obrestne mere prilagajajo obrestni meri obratnega repoja.
Viri: centralne banke, JP Morgan