daily bulletin

16 September 2020

아시아 증시는 화요일 전반적으로 상승 마감했습니다. 중국 증시는 고무적인 경기지표와 코로나바이러스 백신 개발 관련 긍정적인 뉴스로 인해 상승 마감했습니다. 중국의 8월 산업생산량은 8개월 만에 가장 가속화된 반면 소매 판매는 올해 처음으로 증가했습니다. 한국 증시 또한 아시아 증시의 상승세와 더불어 고무적인 중국지표 및 코로나 백신 개발 뉴스로 상승 마감했습니다. 일본 증시는 엔화 강세로 수출기업 압박과 3일간의 상승폭에 대한 차익 실현으로 인해 하락 마감하였습니다.

유럽 증시는 화요일 상승 마감했습니다. STOXX 600은 중국의 견조한 산업 생산 데이터가 광업 및 럭셔리 브랜드 주가를 견인하며 과거 3주 최고치에 근접했으며, 스웨덴의 H & M은 실적 발표 이후 10 % 이상 급등했습니다. 소매 지수는 2.3 % 상승하여 유럽내 전반적인 업종별 이익을 주도했습니다. FTSE 100은 몇 차례의 긍정적인 기업 설명회 및 예상치를 웃도는 고용지표로 인해 1.3 % 증가했습니다. 그리고 보리스 존슨의 브렉시트 조약 위반을 야기시킬 법안 제안으로 인한 정당내 반대 또한 상승세에 기여했습니다.

미국 증시는 중앙 은행의 이틀간의 회의가 진행됨에 따라 연방 준비 제도가 현 지지 정책을 고수할 것이라는 기대심리에 상승 마감 했습니다. 화요일 발표된 데이터 중 8월 미국 공장 생산량의 견조한 증가세를 보였습니다. 이와는 별도로, 8월 한달 미국 수입가격도 예상치를 웃돌면서 물가 상승 압력에 대한 견해를 뒷받침했습니다. 그러나 시장은 애플이 제품 출시 이벤트 이후 보여줬던 오전장 상승세를 대부분 반납함에도 불구하고 세션 최고치에서 마감했습니다.

미 국채 금리는 화요일 가팔라진 수익률 곡선과 더불어 상승했습니다. 주식 시장은 상승하였으며 중앙은행은 이틀간의 회의를 진행했습니다.

국제 유가는 미국의 허리케인으로 인한 공급 중단으로 화요일 2% 이상 상승했습니다. 이와는 별도로, 미국 석유검정 협회에서 발표한 데이터에 따르면 미국 원유재고는 9월 11일 주까지 950만 배럴 감소한 4억 9,460만배럴을 기록했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q2 20	Q1 20	Aug-20	Jul-20	Jun-20
World	576	0.5	-1.5	3.5	19.4	-21.3	6.2	5.3	3.2
United States	3,286	0.6	-2.9	8.3	21.8	-19.7	7.5	5.9	2.3
Europe	1,659	0.5	0.4	-4.9	15.6	-24.2	4.1	3.9	4.1
Japan	3,393	-0.4	1.6	0.1	11.6	-16.6	7.6	-1.6	0.0
Emerging Markets	1,113	0.8	1.1	1.8	18.2	-23.6	2.2	9.0	7.4
Asia Pac Ex Japan	571	0.7	0.0	5.4	18.5	-20.7	3.8	8.0	8.2
Asia Ex Japan	729	0.8	0.6	7.9	16.8	-18.4	3.6	8.6	8.4
Australia	749	-0.1	-3.7	-8.5	29.0	-33.2	5.6	4.5	7.0
Hong Kong	11,115	0.9	-0.1	-3.4	9.2	-17.3	7.9	-0.7	11.0
China H	99	0.8	-1.6	18.0	15.4	-10.2	5.7	9.5	9.0
China A	2,197	1.2	-2.3	24.0	15.8	-9.2	4.8	15.1	10.5
Korea	510	1.2	6.6	8.3	19.6	-22.4	2.1	7.2	8.2
Taiwan	496	0.6	3.4	16.7	21.5	-19.0	-1.7	16.6	9.3
Thailand	346	1.4	-2.3	-23.8	23.8	-33.7	-2.2	-2.9	2.1
Malaysia	309	1.5	-0.3	-4.5	13.6	-19.2	-3.7	8.3	2.7
Singapore	3,011	0.1	-1.8	-21.1	9.6	-28.2	2.0	0.2	4.4
Indonesia	636	-1.8	-6.0	-24.1	24.4	-39.4	2.6	4.4	7.2
India	572	0.4	2.9	-2.2	20.6	-31.1	3.5	10.5	6.8
Philippines	436	0.3	1.8	-18.6	19.8	-32.0	1.0	-2.9	8.2
Local Indices	**Latest**	**1 Day**	**MTD**	**YTD**	**Q2 20**	**Q1 20**	**Aug-20**	**Jul-20**	**Jun-20**
DJIA	27,996	0.0	-1.4	-0.1	18.5	-22.7	7.9	2.5	1.8
Nasdaq	11,190	1.2	-4.9	25.6	30.9	-14.0	9.7	6.9	6.1
S&P 500	3,401	0.5	-2.7	6.7	20.5	-19.6	7.2	5.6	2.0
Euro Stoxx 600	371	0.7	1.3	-8.8	13.8	-22.5	3.1	-0.9	3.1
FTSE100	6,106	1.3	2.5	-17.0	9.1	-23.8	1.8	-4.2	1.7
DAX	13,218	0.2	2.1	-0.2	23.9	-25.0	5.1	0.0	6.2
CAC 40	5,068	0.3	2.5	-13.5	13.5	-26.1	3.4	-2.6	5.5
FTSE MIB	19,957	0.8	1.6	-13.4	15.1	-27.2	2.8	-1.1	6.8
Ibex 35	7,036	1.2	1.0	-24.5	8.1	-28.6	1.3	-4.4	2.8
Hang Seng	24,733	0.4	-1.5	-9.7	4.7	-15.9	2.5	1.5	7.4
Nikkei	23,455	-0.4	1.4	0.3	18.0	-19.2	6.6	-2.6	2.0
KOSPI	323	0.7	5.2	10.6	18.6	-19.2	2.6	6.9	4.7
Bonds and Commodities	**Latest**	**1 Day**	**MTD**	**YTD**	**Q2 20**	**Q1 20**	**Aug-20**	**Jul-20**	**Jun-20**
Brent	40.7	2.7	-10.1	-38.3	81.0	-66.8	4.6	5.2	16.5
WTI	38.4	2.7	-10.4	-37.1	91.7	-66.8	6.4	2.5	10.7
US 10Y yield	0.68	0.0	-5.6	-64.6	-5.7	-63.2	30.9	-16.7	1.5
US 3M yield	0.11	0.0	0.0	-92.9	45.5	-93.0	22.2	-43.8	14.3
US 2Y yield	0.14	0.0	0.0	-91.1	-30.4	-85.4	27.3	-31.3	0.0

Source: Eastspring Investments (Singapore) Limited., MSCI from Bloomberg in USD terms. All data extracted from Bloomberg are in local currency terms except those denoted by "+", which are in USD terms. % Chg and net change refers to the change compared to previous trading day. YTD stands for year to date. # Libor rates come from British Bankers Association. NA represents not available.

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