

**아시아 증시**는 하락 마감했습니다. 중국 시장은 중앙은행이 기준 대출금리 유지와 투자자들의 수익 실현으로 필수 소비재 및 금융주 주도 하에 하락했습니다. 한국 증시는 유럽에서 급증하는 COVID 사례에 대한 우려와 악화되고 있는 미국의 재정 부양에 대한 희망이 국내 무역과 바이러스 상황에 대한 낙관론을 상쇄하면서 하락했습니다. 인도 시장은 국내외의 COVID 감염 사례가 증가하면서 은행주와 금속주가 주도하며 하락세를 보였습니다.

**유럽 증시**는 제2의 COVID-19 감염 파동에 대한 공포가 여행과 레저 주식을 강타하면서 3개월 만에 최악의 하락을 기록했고, 은행들은 HSBC와 Standard Chartered를 포함한 주요 은행들의 2조 달러에 달하는 의심스러운 이체에 따라 큰 폭 하락했습니다. 범유럽 STOXX 600은 3.2% 하락했습니다. 런던의 FTSE 100 지수는 영국의 Matt Hancock 보건장관이 일요일 2차 국가 폐쇄가 가능하다고 말한 이후 3.4% 하락하며 가장 큰 타격을 받았습니다.

**미국 증시**는 유럽의 새로운 봉쇄와 의회의 새로운 경기부양책 지연이 경제가 예상보다 더 긴 회복에 직면해 있다는 우려를 제기하며 큰 폭 하락했습니다. 항공사, 호텔 및 크루즈 기업들은 유럽 경쟁사들의 하락세를 따라갔습니다. 새로운 봉쇄 조치가 사용을 증가시킬 것이라는 전망에 Zoom은 6% 이상 주가가 상승했습니다. JPMorgan Chase & Co.와 Bank of New York Mellon Corp은 몇몇 글로벌 은행들이 불법 자금으로 추정되는 큰 보고에 주가가 하락했습니다.

**미국 채 금리**는 하락세를 보였지만, 지난 주부터 주식 매도세가 계속되면서 최저점에서는 회복되었습니다. 10년 만기 재무부 채권 금리는 0.68%로 2 bps 이상 하락했습니다.

**국제 유가**는 코로나바이러스 환자가 증가하면서 국제 수요에 대한 우려가 높아지고, 리비아 생산의 잠재적 수익률이 공급 과잉에 대한 우려를 증폭시킴에 따라 타 증시 및 상품 시장과 함께 급락했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q2 20	Q1 20	Aug-20	Jul-20	Jun-20
World	558	-1.6	-4.5	0.4	19.4	-21.3	6.2	5.3	3.2
United States	3,176	-1.0	-6.1	4.6	21.8	-19.7	7.5	5.9	2.3
Europe	1,581	-4.1	-4.3	-9.3	15.6	-24.2	4.1	3.9	4.1
Japan	3,422	-0.2	2.4	1.0	11.6	-16.6	7.6	-1.6	0.0
Emerging Markets	1,090	-1.6	-0.9	-0.2	18.2	-23.6	2.2	9.0	7.4
Asia Pac Ex Japan	562	-1.3	-1.4	3.9	18.5	-20.7	3.8	8.0	8.2
Asia Ex Japan	719	-1.1	-0.6	6.6	16.8	-18.4	3.6	8.6	8.4
Australia	730	-2.1	-6.2	-10.9	29.0	-33.2	5.6	4.5	7.0
Hong Kong	10,799	-1.7	-2.9	-6.2	9.2	-17.3	7.9	-0.7	11.0
China H	97	-1.1	-3.0	16.3	15.4	-10.2	5.7	9.5	9.0
China A	2,187	-1.4	-2.7	23.4	15.8	-9.2	4.8	15.1	10.5
Korea	508	-0.5	6.1	7.8	19.6	-22.4	2.1	7.2	8.2
Taiwan	495	-0.7	3.5	16.8	21.5	-19.0	-1.7	16.6	9.3
Thailand	340	-1.6	-3.9	-25.0	23.8	-33.7	-2.2	-2.9	2.1
Malaysia	303	-0.9	-2.1	-6.3	13.6	-19.2	-3.7	8.3	2.7
Singapore	2,997	-1.0	-2.3	-21.5	9.6	-28.2	2.0	0.2	4.4
Indonesia	622	-1.2	-8.1	-25.8	24.4	-39.4	2.6	4.4	7.2
India	561	-2.4	0.9	-4.1	20.6	-31.1	3.5	10.5	6.8
Philippines	430	0.0	0.4	-19.7	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	27,148	-1.8	-4.4	-3.2	18.5	-22.7	7.9	2.5	1.8
Nasdaq	10,779	-0.1	-8.4	21.0	30.9	-14.0	9.7	6.9	6.1
S&P 500	3,281	-1.2	-6.2	3.0	20.5	-19.6	7.2	5.6	2.0
Euro Stoxx 600	357	-3.2	-2.6	-12.2	13.8	-22.5	3.1	-0.9	3.1
FTSE100	5,804	-3.4	-2.6	-21.1	9.1	-23.8	1.8	-4.2	1.7
DAX	12,542	-4.4	-3.1	-5.3	23.9	-25.0	5.1	0.0	6.2
CAC 40	4,792	-3.7	-3.1	-18.2	13.5	-26.1	3.4	-2.6	5.5
FTSE MIB	18,793	-3.6	-4.2	-18.3	15.1	-27.2	2.8	-1.1	6.8
Ibex 35	6,692	-3.4	-4.0	-28.2	8.1	-28.6	1.3	-4.4	2.8
Hang Seng	23,951	-2.1	-4.5	-12.4	4.7	-15.9	2.5	1.5	7.4
Nikkei	23,360	Hol.	1.0	-0.1	18.0	-19.2	6.6	-2.6	2.0
KOSPI	316	-0.8	2.8	8.1	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	41.4	-4.0	-8.5	-37.2	81.0	-66.8	4.6	5.2	16.5
WTI	39.6	-3.4	-7.6	-35.2	91.7	-66.8	6.4	2.5	10.7
US 10Y yield	0.68	-2.9	-5.6	-64.6	-5.7	-63.2	30.9	-16.7	1.5
US 3M yield	0.10	0.0	-9.1	-93.5	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.

For more information contact: [content@eastspring.com](mailto:content@eastspring.com) | T: +65 6349 9100

## DISCLAIMER

This document is produced by Eastspring Investments (Singapore) Limited and issued in:

- **Singapore and Australia (for wholesale clients only)** by Eastspring Investments (Singapore) Limited (UEN: 199407631H), which is incorporated in Singapore, is exempt from the requirement to hold an Australian financial services licence and is licensed and regulated by the Monetary Authority of Singapore under Singapore laws which differ from Australian laws.
- **Hong Kong** by Eastspring Investments (Hong Kong) Limited and has not been reviewed by the Securities and Futures Commission of Hong Kong.
- **Indonesia** by PT Eastspring Investments Indonesia, an investment manager that is licensed, registered and supervised by the Indonesia Financial Services Authority (OJK).
- **Malaysia** by Eastspring Investments Berhad (531241-U).
- **United States of America (for institutional clients only)** by Eastspring Investments (Singapore) Limited (UEN: 199407631H), which is incorporated in Singapore and is registered with the U.S Securities and Exchange Commission as a registered investment adviser.
- **European Economic Area (for professional clients only) and Switzerland (for qualified investors only)** by Eastspring Investments (Luxembourg) S.A., 26, Boulevard Royal, 2449 Luxembourg, Grand-Duchy of Luxembourg, registered with the Registre de Commerce et des Sociétés (Luxembourg), Register No B 173737.
- **United Kingdom (for professional clients only)** by Eastspring Investments (Luxembourg) S.A. - UK Branch, 125 Old Broad Street, London EC2N 1AR.
- **Chile (for institutional clients only)** by Eastspring Investments (Singapore) Limited (UEN: 199407631H), which is incorporated in Singapore and is licensed and regulated by the Monetary Authority of Singapore under Singapore laws which differ from Chilean laws.

The afore-mentioned entities are hereinafter collectively referred to as **Eastspring Investments**.

The views and opinions contained herein may not necessarily represent views expressed or reflected in other Eastspring Investments' communications. This document is solely for information purposes and does not have any regard to the specific investment objective, financial situation and/or particular needs of any specific persons who may receive this document. This document is not intended as an offer, a solicitation of offer or a recommendation, to deal in shares of securities or any financial instruments. It may not be published, circulated, reproduced or distributed without the prior written consent of Eastspring Investments. Reliance upon information in this posting is at the sole discretion of the reader. Please consult your own professional adviser before investing.

Investment involves risk. Past performance and the predictions, projections, or forecasts on the economy, securities markets or the economic trends of the markets are not necessarily indicative of the future or likely performance of Eastspring Investments or any of the funds managed by Eastspring Investments.

Information herein is believed to be reliable at time of publication. Data from third party sources may have been used in the preparation of this material and Eastspring Investments has not independently verified, validated or audited such data. Where lawfully permitted, Eastspring Investments does not warrant its completeness or accuracy and is not responsible for error of facts or opinion nor shall be liable for damages arising out of any person's reliance upon this information. Any opinion or estimate contained in this document may subject to change without notice.

Eastspring Investments (excluding JV companies) companies are ultimately wholly-owned/indirect subsidiaries/associate of Prudential plc of the United Kingdom. Eastspring Investments companies (including JV's) and Prudential plc are not affiliated in any manner with Prudential Financial, Inc., a company whose principal place of business is in the United States of America.

For more information contact: [content@eastspring.com](mailto:content@eastspring.com) | T: +65 6349 9100