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미국 증시는 실업수당 청구건수가 예상밖으로 증가했음에도 새로운 주택의 매매가 급증했다는 지표로 경기 회복에 대한 믿음이 되살아나며 그동안 폭락한 기술주들의 주도 하에 변동성 속에 상승했습니다. 애플, 아마존, 엔비디아, 페이스북의 주가는 상승 마감했습니다. 낸시 펠로시 하원의장이 백악관과 협상할 준비가 되어 있다고 재차 강조함에 따라, 한 중진 의원은 민주당이 다음 주 표결에 부쳐질 수 있는 2조 2천억 달러 규모의 경기부양책을 마련 중이라고 말했습니다.

미국채 금리는 노동시장 지표가 경기 회복의 동력이 부족할 수도 있다는 신호를 보내면서 하락했지만 주택 분야에 대한 예상보다 강한 리포트의 영향으로 최저치에서 반등했습니다.

국제 유가는 유럽의 새로운 코로나바이러스 파동이 발생하면서 큰 움직임이 없었으며, 일부 국가들은 여행 규제를 다시 강화하여 미국 원유와 연료 재고의 하락을 상쇄했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q2 20	Q1 20	Aug-20	Jul-20	Jun-20
World	550	-0.4	-5.9	-1.1	19.4	-21.3	6.2	5.3	3.2
United States	3,138	0.3	-7.2	3.4	21.8	-19.7	7.5	5.9	2.3
Europe	1,563	-1.3	-5.3	-10.3	15.6	-24.2	4.1	3.9	4.1
Japan	3,357	-1.2	0.5	-0.9	11.6	-16.6	7.6	-1.6	0.0
Emerging Markets	1,058	-1.9	-3.8	-3.2	18.2	-23.6	2.2	9.0	7.4
Asia Pac Ex Japan	545	-2.2	-4.5	0.6	18.5	-20.7	3.8	8.0	8.2
Asia Ex Japan	695	-2.2	-3.9	3.0	16.8	-18.4	3.6	8.6	8.4
Australia	719	-1.8	-7.6	-12.2	29.0	-33.2	5.6	4.5	7.0
Hong Kong	10,549	-1.6	-5.2	-8.4	9.2	-17.3	7.9	-0.7	11.0
China H	95	-1.8	-5.3	13.5	15.4	-10.2	5.7	9.5	9.0
China A	2,121	-2.2	-5.7	19.7	15.8	-9.2	4.8	15.1	10.5
Korea	481	-3.0	0.5	2.1	19.6	-22.4	2.1	7.2	8.2
Taiwan	472	-3.0	-1.4	11.3	21.5	-19.0	-1.7	16.6	9.3
Thailand	324	-2.3	-8.5	-28.7	23.8	-33.7	-2.2	-2.9	2.1
Malaysia	302	0.5	-2.5	-6.6	13.6	-19.2	-3.7	8.3	2.7
Singapore	2,925	-1.6	-4.6	-23.4	9.6	-28.2	2.0	0.2	4.4
Indonesia	592	-2.3	-12.6	-29.5	24.4	-39.4	2.6	4.4	7.2
India	536	-3.3	-3.6	-8.4	20.6	-31.1	3.5	10.5	6.8
Philippines	424	-0.9	-1.1	-20.9	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	26,815	0.2	-5.6	-4.4	18.5	-22.7	7.9	2.5	1.8
Nasdaq	10,672	0.4	-9.3	19.8	30.9	-14.0	9.7	6.9	6.1
S&P 500	3,247	0.3	-7.1	1.9	20.5	-19.6	7.2	5.6	2.0
Euro Stoxx 600	356	-1.0	-2.8	-12.5	13.8	-22.5	3.1	-0.9	3.1
FTSE100	5,823	-1.3	-2.3	-20.8	9.1	-23.8	1.8	-4.2	1.7
DAX	12,607	-0.3	-2.6	-4.8	23.9	-25.0	5.1	0.0	6.2
CAC 40	4,763	-0.8	-3.7	-18.7	13.5	-26.1	3.4	-2.6	5.5
FTSE MIB	18,907	-0.1	-3.6	-17.8	15.1	-27.2	2.8	-1.1	6.8
Ibex 35	6,643	-0.2	-4.7	-28.8	8.1	-28.6	1.3	-4.4	2.8
Hang Seng	23,311	-1.8	-7.1	-14.8	4.7	-15.9	2.5	1.5	7.4
Nikkei	23,088	-1.1	-0.2	-1.3	18.0	-19.2	6.6	-2.6	2.0
KOSPI	302	-2.3	-1.6	3.5	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	41.9	0.4	-7.4	-36.5	81.0	-66.8	4.6	5.2	16.5
WTI	40.2	0.7	-6.2	-34.2	91.7	-66.8	6.4	2.5	10.7
US 10Y yield	0.67	-1.5	-6.9	-65.1	-5.7	-63.2	30.9	-16.7	1.5
US 3M yield	0.10	-9.1	-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.

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