

아시아 증시는 금요일에 크게 상승하여 미국 재정 부양책에 대한 진전의 조짐을 보인 후 밤새 미 증시의 강세를 추적했습니다. 중국의 주요 지수는 거의 변하지 않았습니니다. 한국 증시는 상승세로 마감했지만 6개월 만에 가장 급락하는 주가를 기록했습니다. 일본 증시는 미국의 경기 부양책에 대한 희망이 세계 경제의 건전성에 대한 우려를 상쇄함에 따라 월스트리트에서 기술 주도의 강세를 추적하면서 상승했습니다. 인도와 인도네시아 증시는 각각 2% 이상 상승하며 아시아의 주요 강세 중 하나였습니다.

유럽 증시는 투자자들이 코로나 바이러스 감염의 두 번째 물결이 경제 회복을 방해 할 것이라고 우려함에 따라 하락세로 마감했으며 은행 주식은 사상 최저치로 하락했습니다. 프랑스와 영국은 목요일 코로나바이러스 감염에 대한 새로운 기록을 세웠으며, 스페인 정부는 마드리드 전체에 부분적인 봉쇄를 다시 시행할 것을 권고했습니다. 8월 영국 자동차 생산량이 45% 감소한 후 자동차 제조업체는 1.4% 감소했습니다. 한편 영국 벤틱 회사 인 William Hill은 인수 제안을 받은 후 40% 이상 증등했습니다.

미국 증시는 기술주의 상승세로 금요일 상승세로 마감하여 주요 지수가 1% 이상 상승했습니다. S & P 산업 부문은 데이터에 따르면 8월에 주요 미국산 자본재에 대한 신규 주문이 급증하면서 1.49% 증가했습니다. 보잉의 주가는 6% 이상 올랐고 미국 연방 항공국이 지상 737 MAX의 평가 비행을 수행 할 것이라고 밝히고 유럽 안전 규제 당국이 연말까지 비행이 재개 될 가능성이 있다고 암시한 후 다음 지수를 이끌었습니다.

미 국채 금리는 미국 내구재에 대한 낙관적인 보고 이후 금요일 초 저점에서 하락했습니다. 상무부는 항공기를 제외한 비방위 자본재 주문이 8월에 1.8% 증가해 예상치인 0.5%를 상회했다고 밝혔습니다. **국제 유가**는 금요일 코로나 바이러스 사례가 전 세계적으로 급증하고 향후 몇 주 동안 석유 공급이 증가 할 것으로 예상됨에 따라 하락했습니다. 에너지 서비스 회사 인 베이커 휴즈에 따르면 미국의 석유 및 가스 굴착 장비 수는 9월 25일까지 한 주 동안 6개에서 261개로 증가했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q2 20	Q1 20	Aug-20	Jul-20	Jun-20
World	555	1.0	-5.0	-0.1	19.4	-21.3	6.2	5.3	3.2
United States	3,192	1.7	-5.6	5.2	21.8	-19.7	7.5	5.9	2.3
Europe	1,559	-0.3	-5.6	-10.6	15.6	-24.2	4.1	3.9	4.1
Japan	3,364	0.2	0.7	-0.8	11.6	-16.6	7.6	-1.6	0.0
Emerging Markets	1,059	0.1	-3.7	-3.0	18.2	-23.6	2.2	9.0	7.4
Asia Pac Ex Japan	548	0.5	-4.0	1.2	18.5	-20.7	3.8	8.0	8.2
Asia Ex Japan	697	0.3	-3.6	3.3	16.8	-18.4	3.6	8.6	8.4
Australia	731	1.7	-6.1	-10.7	29.0	-33.2	5.6	4.5	7.0
Hong Kong	10,602	0.5	-4.7	-7.9	9.2	-17.3	7.9	-0.7	11.0
China H	95	-0.3	-5.6	13.2	15.4	-10.2	5.7	9.5	9.0
China A	2,123	0.1	-5.5	19.8	15.8	-9.2	4.8	15.1	10.5
Korea	482	0.4	0.8	2.4	19.6	-22.4	2.1	7.2	8.2
Taiwan	473	0.3	-1.1	11.7	21.5	-19.0	-1.7	16.6	9.3
Thailand	323	-0.2	-8.7	-28.8	23.8	-33.7	-2.2	-2.9	2.1
Malaysia	304	0.7	-1.8	-5.9	13.6	-19.2	-3.7	8.3	2.7
Singapore	2,949	0.8	-3.9	-22.8	9.6	-28.2	2.0	0.2	4.4
Indonesia	609	3.0	-10.0	-27.4	24.4	-39.4	2.6	4.4	7.2
India	551	2.8	-0.9	-5.8	20.6	-31.1	3.5	10.5	6.8
Philippines	424	0.1	-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	27,174	1.3	-4.3	-3.1	18.5	-22.7	7.9	2.5	1.8
Nasdaq	10,914	2.3	-7.3	22.5	30.9	-14.0	9.7	6.9	6.1
S&P 500	3,298	1.6	-5.7	3.5	20.5	-19.6	7.2	5.6	2.0
Euro Stoxx 600	356	-0.1	-2.9	-12.5	13.8	-22.5	3.1	-0.9	3.1
FTSE100	5,843	0.3	-1.9	-20.5	9.1	-23.8	1.8	-4.2	1.7
DAX	12,469	-1.1	-3.7	-5.9	23.9	-25.0	5.1	0.0	6.2
CAC 40	4,730	-0.5	-4.2	-19.2	13.5	-26.1	3.4	-2.6	5.5
FTSE MIB	18,698	-1.1	-4.7	-18.8	15.1	-27.2	2.8	-1.1	6.8
Ibex 35	6,628	-0.2	-4.9	-28.9	8.1	-28.6	1.3	-4.4	2.8
Hang Seng	23,235	-0.3	-7.4	-15.1	4.7	-15.9	2.5	1.5	7.4
Nikkei	23,205	0.5	0.3	-0.8	18.0	-19.2	6.6	-2.6	2.0
KOSPI	304	0.4	-1.2	3.9	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	0.0	-7.4	-36.5	81.0	-66.8	4.6	5.2	16.5
WTI	40.0	-0.4	-6.6	-34.4	91.7	-66.8	6.4	2.5	10.7
US 10Y yield	0.66	-1.5	-8.3	-65.6	-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	0.12	-14.3	-14.3	-92.4	-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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