daily bulletin

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STOCKS | BONDS | INTEREST RATES | COMMODITIES | CURRENCIES

아시아 증시는 금요일에 혼조세로 마감되었습니다. 중국 주식은 일주일의 연휴 후 본토 시장이 거래를 재개하면서 상승 마감했는데, 이는 연휴 기간 동안 경기 회복과 관광 회복의 징후를 보인 공식 자료에 투자자들이 영향을 받은 때문입니다. 인도 증시는 중앙은행이 고 인플레이션에 맞서 완강하게 금리를 유지하면서 유동성과 대출을 활성화하기 위한 조치를 발표한 후 은행주 주도하에 상승했습니다. 일본 시장은 소폭 하락했고 호주 증시는 보합세로 마감했습니다.

유럽 증시는 금요일, 판도라와 노보 노디스크의 긍정적 예측이 실적 시즌에 더 밝은 전망을 내놓으면서 상승 마감했고, 투자자들은 미국 경기 부양책에 대한 새로운 징후를 주시하고 있습니다. 일련의 인수합병(M&A)과 여행 레저, 은행, 석유 가스 등의 업종의 반등이 유로존 증시를 끌어올렸습니다. 영국의 Rishi Sunak 재무장관이 실업률 급증을 막기 위한 대책을 발표하면서 영국 증시가 상승했습니다. 판도라는 17% 이상, 노보노디스크는 3% 이상 상승했습니다.

미국 증시는 금요일 S&P 500 및 나스닥 지수가 연방정부의 재정지원에 대한 낙관론이 커지면서 7월 이후 가장 큰 주간 상승률을 기록했습니다. 트럼프는 인터뷰에서 "민주당이나 공화당이 내놓던 것보다 더 큰 경기부양책을 보고 싶다"며 "주초 협상을 중단하겠다던 언급을 뒤집었습니다. S&P 500 기술주는 1.5% 상승하여 S&P 500 섹터 중 가장 큰 상승세를 보였습니다. Xilinx는 AMD의 인수 제안 보고서에서 14% 이상 급등했습니다.

미 국채 금리는 주 초와 반대로 트럼프 대통령 관련 리스크에 대한 시장의 선호도가 개선되면서 금요일 소폭 상승했습니다.

국제 유가는 노르웨이에서 석유 노동자들의 파업이 끝난 후 1% 이상 하락했는데, 이는 허리케인 델타로 미국 에너지 기업들이 감산을 해야 함에도 불구하고 원유 생산을 증가시킬 것입니다.

MSCI	Latest	1 Day	MTD	YTD	Q3 20	Q2 20	Q1 20	Sep-20	Aug-20	Jul-20
World	585	0.8	3.5	5.3	8.3	19.4	-21.3	-3.2	6.2	5.3
United States	3,371	0.9	3.6	11.1	9.6	21.8	-19.7	-3.7	7.5	5.9
Europe	1,649	1.1	3.4	-5.3	4.6	15.6	-24.2	-3.3	4.1	3.9
Japan	3,392	-0.1	1.3	1.0	7.1	11.6	-16.6	1.1	7.6	-1.6
Emerging Markets	1,123	0.5	3.8	2.9	9.7	18.2	-23.6	-1.6	2.2	9.0
Asia Pac Ex Japan	580	0.3	4.1	7.2	9.6	18.5	-20.7	-2.3	3.8	8.0
Asia Ex Japan	740	0.2	3.9	9.7	10.8	16.8	-18.4	-1.5	3.6	8.6
Australia	766	0.9	5.6	-6.5	2.8	29.0	-33.2	-6.8	5.6	4.5
Hong Kong	10,839	-0.6	2.7	-5.8	1.6	9.2	-17.3	-5.2	7.9	-0.7
China H	101	0.5	3.5	20.7	12.6	15.4	-10.2	-2.7	5.7	9.5
China A	2,229	3.0	3.7	25.8	15.4	15.8	-9.2	-4.3	4.8	15.1
Korea	513	Hol.	4.2	9.2	12.9	19.6	-22.4	3.1	2.1	7.2
Taiwan	510	Hol.	4.3	20.2	17.1	21.5	-19.0	2.1	-1.7	16.6
Thailand	336	-0.1	5.0	-25.9	-14.0	23.8	-33.7	-9.5	-2.2	-2.9
Malaysia	312	0.8	2.6	-3.4	2.6	13.6	-19.2	-1.7	-3.7	8.3
Singapore	3,073	0.1	3.4	-19.5	-1.0	9.6	-28.2	-3.1	2.0	0.2
Indonesia	626	0.1	6.3	-25.4	-6.8	24.4	-39.4	-13.0	2.6	4.4
India	590	0.4	5.6	1.0	15.1	20.6	-31.1	0.6	3.5	10.5
Philippines	432	-0.3	1.6	-19.3	-2.6	19.8	-32.0	-0.7	1.0	-2.9
Local Indices	**Latest**	**1 Day**	**MTD**	**YTD**	**Q3 20**	**Q2 20**	**Q1 20**	**Sep-20**	**Aug-20**	**Jul-20**
DJIA	28,587	0.6	3.0	2.0	8.2	18.5	-22.7	-2.2	7.9	2.5
Nasdaq	11,580	1.4	3.7	30.0	11.2	30.9	-14.0	-5.1	9.7	6.9
S&P 500	3,477	0.9	3.5	9.2	8.9	20.5	-19.6	-3.8	7.2	5.6
Euro Stoxx 600	370	0.6	2.6	-8.8	0.7	13.8	-22.5	-1.4	3.1	-0.9
FTSE100	6,017	0.6	2.7	-18.1	-4.0	9.1	-23.8	-1.5	1.8	-4.2
DAX	13,051	0.1	2.3	-1.5	3.7	23.9	-25.0	-1.4	5.1	0.0
CAC 40	4,947	0.7	3.0	-15.4	-2.0	13.5	-26.1	-2.7	3.4	-2.6
FTSE MIB	19,595	0.1	3.1	-14.9	-1.4	15.1	-27.2	-3.0	2.8	-1.1
Ibex 35	6,951	-0.6	3.5	-25.5	-6.6	8.1	-28.6	-3.6	1.3	-4.4
Hang Seng	24,119	-0.3	2.8	-11.8	-2.6	4.7	-15.9	-6.4	2.5	1.5
Nikkei	23,620	-0.1	1.9	1.6	4.7	18.0	-19.2	0.8	6.6	-2.6
KOSPI	317	Hol.	2.6	8.9	10.7	18.6	-19.2	0.9	2.6	6.9
Bonds and Commodities	**Latest**	**1 Day**	**MTD**	**YTD**	**Q3 20**	**Q2 20**	**Q1 20**	**Sep-20**	**Aug-20**	**Jul-20**
Brent	42.9	-1.1	4.6	-35.1	-0.5	81.0	-66.8	-9.6	4.6	5.2
WTI	40.5	-2.0	1.7	-33.6	1.5	91.7	-66.8	-7.0	6.4	2.5
US 10Y yield	0.79	1.3	14.5	-58.9	4.5	-5.7	-63.2	-4.2	30.9	-16.7
US 3M yield	0.10	11.1	0.0	-93.5	-37.5	45.5	-93.0	-9.1	22.2	-43.8
US 2Y yield	0.16	23.1	23.1	-89.9	-18.8	-30.4	-85.4	-7.1	27.3	-31.3

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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