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유럽 증시는 3% 이상 상승한 여행/레저 주식으로 인해 상승 마감했습니다. 유럽의 저가항공사인 Ryanair는 장기적인 수요 예측치 조정 이후 7% 이상 상승했습니다. 경쟁사인 easyJet, British Airways, 및 Wizz Air 또한 4% 이상 상승했습니다. 스페인 정부는 기존 에너지 정책을 무력화하는 비상법안을 발의한 이후 전력 회사 Endesa 및 Iberdrola는 3거래일 연속 하락세를 보이며, 2020년 이래 최저점을 보였습니다. 영국의류 브랜드 Superdry는 고무적인 2022년 매출예상치 발표 이후 14% 이상 상승했습니다.

미국 증시는 소폭 하락 마감했습니다. 국채 금리 상승으로 인한 업종선도 기술주의 하락과 달러 강세로 인한 수출기업들에 대한 우려로 인해 S&P 500 및 다우존스지수는 하락 마감했습니다. 강력한 경기 회복세를 뒷받침하는 기대이상의 리테일 매출 지표로 인해 오후장에서 하락세를 소폭 상쇄했습니다. 견조한 온라인 매출로 인한 Amazon 주식의 상승세는 Nasdaq 지수 상승에 기여했습니다. 반면에, S&P500 지수내 11개 업종 중 8개 업종은 하락 마감했습니다.

미국 경기 회복에 대한 우려가 견조한 온라인 소비로 인해 상쇄되고, 미국 상무부의 고무적인 리테일 매출 지표 발표 이후 미국채 금리는 상승 마감했습니다.

허리케인 니콜라스로 인한 미국 걸프 해안의 오일 생산 감소에 대한 우려가 감소함에 따라 유가는 최근 몇 주내 최고점을 찍으며, 상승세를 유지했습니다. 기존보다 감소한 러시아 천연가스 공급량으로 인해 천연가스 가격이 상승한 점 또한 유가 상승에 기여했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q2 21	Q1 21	Q4 20	Aug-21	Jul-21	Jun-21
World	735	-0.2	-0.7	15.4	7.5	4.7	14.8	2.5	0.7	1.4
United States	4,354	-0.1	-1.0	19.9	8.9	5.5	13.2	3.0	2.4	2.8
Europe	2,060	-0.1	-1.3	14.6	7.7	4.2	15.7	1.5	1.9	-1.3
Japan	4,206	-0.7	6.9	10.4	-0.2	1.7	15.3	3.1	-1.3	-0.3
Emerging Markets	1,277	-0.9	-2.3	0.7	5.1	2.3	19.8	2.7	-6.7	0.2
Asia Pac Ex Japan	649	-0.8	-2.2	-0.2	4.1	2.8	19.2	2.2	-6.6	-0.3
Asia Ex Japan	816	-0.9	-2.5	-1.6	3.7	2.8	18.7	2.3	-7.4	-0.1
Australia	942	0.0	-0.8	9.8	6.9	3.4	22.9	1.5	-1.3	-1.3
Hong Kong	11,999	-1.7	-4.7	1.1	2.5	7.3	15.5	-0.7	-2.9	-1.8
China A	2,487	-1.7	0.4	-0.6	9.3	-4.2	18.2	1.1	-6.5	-1.4
Korea	638	-1.0	-3.6	-4.4	4.9	1.8	38.6	-1.6	-5.6	1.4
Taiwan	709	-0.5	-0.8	20.9	7.2	11.0	23.2	4.6	-2.0	0.7
Thailand	390	-0.1	-3.5	-0.4	-4.8	4.4	25.5	11.6	-6.9	-3.4
Malaysia	300	0.0	-2.6	-6.9	-2.5	-5.8	10.1	8.4	-4.0	-3.9
Singapore	3,767	0.0	0.6	10.3	0.5	8.9	18.9	-1.2	1.3	-2.6
Indonesia	701	-0.5	-0.7	-7.4	-4.8	-7.5	31.8	7.9	-1.9	-6.0
India	865	0.4	2.6	29.3	7.0	5.2	21.2	11.0	0.9	-0.7
Philippines	490	1.3	0.7	-4.4	7.6	-10.4	22.3	11.5	-11.7	2.1
Local Indices	Latest	1 Day	MTD	YTD	Q2 21	Q1 21	Q4 20	Aug-21	Jul-21	Jun-21
DJIA	34,751	-0.2	-1.6	15.1	5.1	8.3	10.7	1.5	1.3	0.0
Nasdaq	15,182	0.1	-0.5	18.4	9.7	3.0	15.6	4.1	1.2	5.5
S&P 500	4,474	-0.2	-1.0	20.4	8.5	6.2	12.1	3.0	2.4	2.3
Euro Stoxx 600	466	0.4	-1.0	19.4	6.7	8.3	10.9	2.2	2.1	1.5
FTSE100	7,027	0.2	-1.1	12.0	5.7	5.0	10.9	2.1	0.1	0.4
DAX	15,652	0.2	-1.2	14.1	3.5	9.4	7.5	1.9	0.1	0.7
CAC 40	6,623	0.6	-0.9	21.7	9.1	9.6	15.8	1.0	1.6	1.2
FTSE MIB	25,964	0.8	-0.2	19.2	3.2	11.3	17.0	2.5	1.4	0.0
Ibex 35	8,734	1.1	-1.3	10.3	3.8	6.7	21.2	2.0	-1.1	-3.0
Hang Seng	24,668	-1.4	-4.4	-7.2	2.7	4.5	16.2	-0.1	-9.6	-0.6
Nikkei	30,323	-0.6	8.0	11.5	-1.2	7.0	18.5	3.0	-5.2	-0.1
KOSPI	409	-0.9	-2.5	6.3	5.9	7.5	27.1	-0.9	-3.3	2.7
Bonds and Commodities	Latest	1 Day	MTD	YTD	Q2 21	Q1 21	Q4 20	Aug-21	Jul-21	Jun-21
Brent	75.6	0.2	5.5	46.0	18.5	21.7	26.5	-6.1	2.2	7.7
WTI	72.6	0.0	6.0	49.9	23.5	23.1	21.5	-7.2	0.3	10.0
US 10Y yield	1.34	2.3	3.1	44.1	-16.7	87.1	34.8	4.8	-14.5	-8.2
US 3M yield	0.04	0.0	0.0	-55.6	66.7	-66.7	-10.0	-33.3	20.0	400.0
US 2Y yield	0.23	9.5	15.0	76.9	56.3	23.1	0.0	5.3	-24.0	78.6

Source: Eastspring Investments (Singapore) Limited., MSCI in USD terms. Local indices are in local currency terms. MTD stands for month to date. YTD stands for year to date. NA represents not available.

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