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유럽 증시는 금요일 투자자들이 노딜 블랙리스트 전망으로 인한 경제 위험에 대한 M&A 활동의 회복 조짐에 무게를 두면서 상승 마감했습니다. 범유럽 STOXX 600 지수는 0.1% 상승하며 주간 단위로도 상승 마감했습니다. 인수합병(M&A) 테마가 중심이 되어 설립자 패트릭 드라히가 인수하기로 합의한 후 알티스 유럽 주가가 24% 이상 급등했고, 아리스타 주가는 사모펀드 엘리엇 어드바이저스와 인수 협상을 놓고 사전 협의의 중이라고 밝힌 후 급등했습니다.

미국 증시는 금요일 혼조세로 마감했습니다. 나스닥 지수는 하락했고, S&P 500 지수는 기술주 및 성장주들의 장 초반 상승이 희석되며 보험세를 보였으며 3대 지수 모두 2주 연속 하락세를 기록했습니다. 기술주 섹터는 6일 동안 5번 하락을 기록했고 3월 이후 주간 하락률이 가장 컸습니다. 애플과 아마존은 금요일에 각각 1% 이상 하락했습니다. 한편 8월 미국 소비자물가는 건조한 상승세를 보였지만, 노동시장의 부진이 물가 상승의 발목을 잡을 것으로 보입니다.

미국채 금리는 지난 3일 1,080억 달러의 공급을 완료한 뒤 하락했고, 투자자들은 8월 소비자물가가 예상보다 많이 올랐는데도 인플레이션이 크게 늘어날 것이라는 의구심을 감추지 못했습니다. **국제 유가**는 대체로 보험세를 보였지만, 전 세계 재고가 증가하고 연료 수요가 코로나 바이러스 이전 수준으로 회복하는 데 어려움을 겪으면서 2주 연속 하락했습니다. 사우디와 쿠웨이트는 아시아에 대한 공식 판매 가격을 인하했고 트레이더들은 선박을 보관용으로 예약했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q2 20	Q1 20	Aug-20	Jul-20	Jun-20
World	566	0.1	-3.2	1.8	19.4	-21.3	6.2	5.3	3.2
United States	3,220	0.0	-4.8	6.0	21.8	-19.7	7.5	5.9	2.3
Europe	1,643	-0.2	-0.5	-5.8	15.6	-24.2	4.1	3.9	4.1
Japan	3,363	0.6	0.7	-0.8	11.6	-16.6	7.6	-1.6	0.0
Emerging Markets	1,092	0.6	-0.8	-0.2	18.2	-23.6	2.2	9.0	7.4
Asia Pac Ex Japan	561	0.5	-1.7	3.6	18.5	-20.7	3.8	8.0	8.2
Asia Ex Japan	715	0.7	-1.2	5.9	16.8	-18.4	3.6	8.6	8.4
Australia	743	-1.0	-4.5	-9.2	29.0	-33.2	5.6	4.5	7.0
Hong Kong	10,978	0.8	-1.4	-4.7	9.2	-17.3	7.9	-0.7	11.0
China H	97	1.2	-3.6	15.5	15.4	-10.2	5.7	9.5	9.0
China A	2,151	1.1	-4.3	21.4	15.8	-9.2	4.8	15.1	10.5
Korea	495	-0.2	3.5	5.1	19.6	-22.4	2.1	7.2	8.2
Taiwan	488	0.2	1.8	14.9	21.5	-19.0	-1.7	16.6	9.3
Thailand	343	-0.8	-3.0	-24.4	23.8	-33.7	-2.2	-2.9	2.1
Malaysia	300	1.8	-3.2	-7.3	13.6	-19.2	-3.7	8.3	2.7
Singapore	3,008	0.0	-1.9	-21.2	9.6	-28.2	2.0	0.2	4.4
Indonesia	626	2.6	-7.5	-25.4	24.4	-39.4	2.6	4.4	7.2
India	568	0.3	2.2	-2.8	20.6	-31.1	3.5	10.5	6.8
Philippines	432	1.0	0.9	-19.3	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	27,666	0.5	-2.6	-1.3	18.5	-22.7	7.9	2.5	1.8
Nasdaq	10,854	-0.6	-7.8	21.8	30.9	-14.0	9.7	6.9	6.1
S&P 500	3,341	0.1	-4.5	4.8	20.5	-19.6	7.2	5.6	2.0
Euro Stoxx 600	368	0.1	0.4	-9.5	13.8	-22.5	3.1	-0.9	3.1
FTSE100	6,032	0.5	1.2	-18.0	9.1	-23.8	1.8	-4.2	1.7
DAX	13,203	0.0	2.0	-0.3	23.9	-25.0	5.1	0.0	6.2
CAC 40	5,034	0.2	1.8	-14.1	13.5	-26.1	3.4	-2.6	5.5
FTSE MIB	19,821	0.0	1.0	-14.0	15.1	-27.2	2.8	-1.1	6.8
Ibex 35	6,943	-0.8	-0.4	-25.5	8.1	-28.6	1.3	-4.4	2.8
Hang Seng	24,503	0.8	-2.4	-10.5	4.7	-15.9	2.5	1.5	7.4
Nikkei	23,406	0.7	1.2	0.1	18.0	-19.2	6.6	-2.6	2.0
KOSPI	316	0.0	3.0	8.3	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	39.8	0.2	-12.0	-39.7	81.0	-66.8	4.6	5.2	16.5
WTI	37.4	0.2	-12.8	-38.8	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	0.11	-8.3	0.0	-92.9	45.5	-93.0	22.2	-43.8	14.3
US 2Y yield	0.13	-7.1	-7.1	-91.8	-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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