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미국 증시는 COVID 백신 개발의 진전 조짐과 수십억 달러의 딜 등으로 투자자들의 낙관론이 높아지면서 상승 마감했습니다. 모든 S&P 500 섹터가 상승 마감했고 부동산과 기술주 주도 하에 상승폭이 확대되었습니다. Nvidia는 영국 기반 칩 디자이너 Arm의 인수 계획에 따라 5.8% 급등했습니다. 오라클은 미국에서 틱톡을 계속 운영하기 위해 ByteDance와 협력할 것이라고 말하면서 4.3% 상승했습니다. 길러드 사이언스의 210억 달러 매수 거래 이후 면역의학 관련 주가가 급등했습니다.

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국제 유가는 글로벌 경제 회복이 지연되고, 리비아가 생산을 재개할 준비가 되어 가며 하락했고, 미국 생산에 지장을 줄 수 있는 임박한 폭풍은 유가를 올리지는 못했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q2 20	Q1 20	Aug-20	Jul-20	Jun-20
World	573	1.2	-2.0	3.0	19.4	-21.3	6.2	5.3	3.2
United States	3,266	1.5	-3.5	7.6	21.8	-19.7	7.5	5.9	2.3
Europe	1,651	0.5	-0.1	-5.3	15.6	-24.2	4.1	3.9	4.1
Japan	3,407	1.3	2.0	0.5	11.6	-16.6	7.6	-1.6	0.0
Emerging Markets	1,104	1.2	0.3	1.0	18.2	-23.6	2.2	9.0	7.4
Asia Pac Ex Japan	567	1.1	-0.7	4.7	18.5	-20.7	3.8	8.0	8.2
Asia Ex Japan	723	1.1	-0.1	7.1	16.8	-18.4	3.6	8.6	8.4
Australia	750	0.9	-3.6	-8.4	29.0	-33.2	5.6	4.5	7.0
Hong Kong	11,018	0.4	-1.0	-4.3	9.2	-17.3	7.9	-0.7	11.0
China H	98	1.3	-2.4	17.0	15.4	-10.2	5.7	9.5	9.0
China A	2,171	0.9	-3.4	22.5	15.8	-9.2	4.8	15.1	10.5
Korea	504	1.8	5.3	7.0	19.6	-22.4	2.1	7.2	8.2
Taiwan	493	1.0	2.8	16.1	21.5	-19.0	-1.7	16.6	9.3
Thailand	341	-0.6	-3.6	-24.8	23.8	-33.7	-2.2	-2.9	2.1
Malaysia	304	1.5	-1.8	-5.9	13.6	-19.2	-3.7	8.3	2.7
Singapore	3,007	0.0	-2.0	-21.2	9.6	-28.2	2.0	0.2	4.4
Indonesia	648	3.5	-4.2	-22.8	24.4	-39.4	2.6	4.4	7.2
India	570	0.2	2.5	-2.6	20.6	-31.1	3.5	10.5	6.8
Philippines	435	0.6	1.5	-18.8	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	27,993	1.2	-1.4	-0.2	18.5	-22.7	7.9	2.5	1.8
Nasdaq	11,057	1.9	-6.1	24.1	30.9	-14.0	9.7	6.9	6.1
S&P 500	3,384	1.3	-3.3	6.2	20.5	-19.6	7.2	5.6	2.0
Euro Stoxx 600	369	0.2	0.6	-9.4	13.8	-22.5	3.1	-0.9	3.1
FTSE100	6,026	-0.1	1.1	-18.0	9.1	-23.8	1.8	-4.2	1.7
DAX	13,194	-0.1	1.9	-0.4	23.9	-25.0	5.1	0.0	6.2
CAC 40	5,052	0.4	2.2	-13.8	13.5	-26.1	3.4	-2.6	5.5
FTSE MIB	19,794	-0.1	0.8	-14.1	15.1	-27.2	2.8	-1.1	6.8
Ibex 35	6,951	0.1	-0.3	-25.5	8.1	-28.6	1.3	-4.4	2.8
Hang Seng	24,640	0.6	-1.9	-10.0	4.7	-15.9	2.5	1.5	7.4
Nikkei	23,559	0.7	1.8	0.8	18.0	-19.2	6.6	-2.6	2.0
KOSPI	321	1.4	4.5	9.8	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	39.6	-0.6	-12.5	-40.0	81.0	-66.8	4.6	5.2	16.5
WTI	37.4	0.0	-12.8	-38.8	91.7	-66.8	6.4	2.5	10.7
US 10Y yield	0.68	1.5	-5.6	-64.6	-5.7	-63.2	30.9	-16.7	1.5
US 3M yield	0.11	0.0	0.0	-92.9	45.5	-93.0	22.2	-43.8	14.3
US 2Y yield	0.14	7.7	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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