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미국 증시는 투자자들이 더 많은 지표가 노동시장 회복 둔화를 가리키면서 더 큰 재정 부양책에 대한 희망을 가져가며 상승 마감했습니다. 지난 주 주간 실업급여를 신청하는 미국인의 수가 78만 7천 명으로 예상보다 많이 줄었지만 여전히 높은 수준을 유지하고 있는 것으로 나타났습니다. 에너지와 금융은 각각 4.16%와 1.88% 상승하며 주요 S&P 섹터 중 가장 가파른 상승세를 기록했습니다. Chipotle Mexican Grill은 분기 이익이 감소하면서 4% 이상 하락했습니다.

미국채 벤치마크 금리는 4개월 만에 최고치를 기록했고 미국 국회의원들이 새로운 재정 부양책에 대한 협상을 거의 마무리하고 있다는 희망으로 금리 곡선은 가팔라졌습니다. 재무부는 5년 만기 물가채 170억 달러 어치에 대한 강한 수요를 보였습니다.

국제 유가는 미국의 경기부양책의 가능성에 힘입어 상승했지만, 미국의 gasoline 재고 증가가 수요전망을 악화시키며 상승폭은 제한되었습니다.

MSCI	Latest	1 Day	MTD	YTD	Q3 20	Q2 20	Q1 20	Sep-20	Aug-20	Jul-20
World	580	0.1	2.7	4.5	8.3	19.4	-21.3	-3.2	6.2	5.3
United States	3,347	0.5	2.9	10.4	9.6	21.8	-19.7	-3.7	7.5	5.9
Europe	1,607	-0.5	0.7	-7.8	4.6	15.6	-24.2	-3.3	4.1	3.9
Japan	3,365	-1.4	0.5	0.2	7.1	11.6	-16.6	1.1	7.6	-1.6
Emerging Markets	1,137	-0.1	5.1	4.2	9.7	18.2	-23.6	-1.6	2.2	9.0
Asia Pac Ex Japan	585	-0.3	5.0	8.1	9.6	18.5	-20.7	-2.3	3.8	8.0
Asia Ex Japan	748	-0.2	5.0	10.9	10.8	16.8	-18.4	-1.5	3.6	8.6
Australia	762	-0.5	5.1	-6.9	2.8	29.0	-33.2	-6.8	5.6	4.5
Hong Kong	10,764	0.5	2.0	-6.5	1.6	9.2	-17.3	-5.2	7.9	-0.7
China H	103	-0.5	6.1	23.7	12.6	15.4	-10.2	-2.7	5.7	9.5
China A	2,264	-0.8	5.3	27.8	15.4	15.8	-9.2	-4.3	4.8	15.1
Korea	517	-0.7	5.0	10.0	12.9	19.6	-22.4	3.1	2.1	7.2
Taiwan	512	0.5	4.7	20.7	17.1	21.5	-19.0	2.1	-1.7	16.6
Thailand	318	-0.4	-0.7	-29.9	-14.0	23.8	-33.7	-9.5	-2.2	-2.9
Malaysia	306	0.4	0.7	-5.2	2.6	13.6	-19.2	-1.7	-3.7	8.3
Singapore	3,065	-0.2	3.1	-19.7	-1.0	9.6	-28.2	-3.1	2.0	0.2
Indonesia	638	0.2	8.4	-23.9	-6.8	24.4	-39.4	-13.0	2.6	4.4
India	583	-0.2	4.3	-0.2	15.1	20.6	-31.1	0.6	3.5	10.5
Philippines	459	1.1	7.8	-14.4	-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	28,364	0.6	2.2	1.2	8.2	18.5	-22.7	-2.2	7.9	2.5
Nasdaq	11,506	0.2	3.1	29.2	11.2	30.9	-14.0	-5.1	9.7	6.9
S&P 500	3,453	0.5	2.8	8.5	8.9	20.5	-19.6	-3.8	7.2	5.6
Euro Stoxx 600	360	-0.1	-0.2	-11.3	0.7	13.8	-22.5	-1.4	3.1	-0.9
FTSE100	5,786	0.2	-1.2	-21.2	-4.0	9.1	-23.8	-1.5	1.8	-4.2
DAX	12,543	-0.1	-1.7	-5.3	3.7	23.9	-25.0	-1.4	5.1	0.0
CAC 40	4,851	-0.1	1.0	-17.1	-2.0	13.5	-26.1	-2.7	3.4	-2.6
FTSE MIB	19,077	0.0	0.3	-17.1	-1.4	15.1	-27.2	-3.0	2.8	-1.1
Ibex 35	6,797	-0.2	1.2	-27.1	-6.6	8.1	-28.6	-3.6	1.3	-4.4
Hang Seng	24,786	0.1	5.7	-9.3	-2.6	4.7	-15.9	-6.4	2.5	1.5
Nikkei	23,474	-0.7	1.2	1.0	4.7	18.0	-19.2	0.8	6.6	-2.6
KOSPI	314	-0.6	1.4	7.6	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	42.4	1.7	3.6	-35.7	-0.5	81.0	-66.8	-9.6	4.6	5.2
WTI	40.6	1.5	1.9	-33.5	1.5	91.7	-66.8	-7.0	6.4	2.5
US 10Y yield	0.87	4.8	26.1	-54.7	4.5	-5.7	-63.2	-4.2	30.9	-16.7
US 3M yield	0.09	-10.0	-10.0	-94.2	-37.5	45.5	-93.0	-9.1	22.2	-43.8
US 2Y yield	0.16	14.3	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.

For more information contact: content@eastspring.com | T: +65 6349 9100

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For more information contact: content@eastspring.com | T: +65 6349 9100