dailybulletin

STOCKS | BONDS | INTEREST RATES | COMMODITIES | CURRENCIES

아시아 시장은 상승 마감했습니다. 중국 증시는 헬스케어, 기술 및 신에너지 자동차 기업들의 하락을 금융 및 소비재 주 상승이 상쇄하면서 상승 마감했습니다. 한국 시장은 삼성주 상승과 경제 회복 희망이 바이러스 우려를 넘어서며 강세를 보였습니다. 나스닥 기술주들의 상승세를 추적하면서 일본 주가도 상승했습니다. 인도 주가는 연중 경기 전망이 호전되는 것의 영향을 받으며 금속과 금융주 주도 하에 급등했습니다. 유럽증시는 독일의 코로나 바이러스 제한 연장과 영국의 암울한 성장 전망이 팬데믹으로 인한 경제적 충격에 다시 초점을 맞추면서 일제히 하락 마감했습니다. STOXX 600은 자동차 및 에너지 섹터의 하락으로 인해 기술 및 헬스케어 섹터의 주가 상승이 상쇄되면서 0.1% 하락했습니다. 한편, 앙겔라 메르켈 총리는 독일이 제2의 감염 피를 억제하기 위해 부과한 제한 조치를 적어도 12월 20일까지 연장할 것이라고 말했습니다. 미국 증시는 추수감사절로 휴장했습니다. 미 국채 시장은 추수감사절 휴일로 휴장했습니다.

국제 유가는 공급 증가 조짐으로 인해 코로나바이러스 백신이 연료 수요를 되살릴 것이라는 낙관론으로 인한 상승세가 중단되면서 7개월 내 최고치를 기록한 이후 하락했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q3 20	Q2 20	Q1 20	Oct-20	Sep-20	Aug-20
World	621	0.1	12.9	12.1	8.3	19.4	-21.3	-2.4	-3.2	6.2
United States	3,531	Hol.	11.6	16.6	9.6	21.8	-19.7	-2.6	-3.7	7.5
Europe	1,761	-0.1	17.2	1.3	4.6	15.6	-24.2	-5.6	-3.3	4.1
Japan	3,750	0.7	13.8	11.6	7.1	11.6	-16.6	-1.6	1.1	7.6
Emerging Markets	1,230	0.9	11.5	12.8	9.7	18.2	-23.6	2.1	-1.6	2.2
Asia Pac Ex Japan	634	0.7	11.3	17.4	9.6	18.5	-20.7	2.4	-2.3	3.8
Asia Ex Japan	807	0.9	10.2	19.7	10.8	16.8	-18.4	2.8	-1.5	3.6
Australia	855	-0.7	18.1	4.6	2.8	29.0	-33.2	0.0	-6.8	5.6
Hong Kong	11,847	-0.2	13.9	3.2	1.6	9.2	-17.3	-1.2	-5.2	7.9
China H	108	0.9	5.2	29.1	12.6	15.4	-10.2	5.3	- 2.7	5.7
China A	2,348	0.4	5.8	32.6	15.4	15.8	-9.2	3.3	-4.3	4.8
Korea	596	1.7	20.3	26.9	12.9	19.6	-22.4	0.6	3.1	2.1
Taiwan	552	0.7	11.5	30.2	17.1	21.5	-19.0	1.3	2.1	-1.7
Thailand	401	1.0	28.3	-11.6	-14.0	23.8	-33.7	-2.3	- 9.5	-2.2
Malaysia	330	1.6	10.4	2.4	2.6	13.6	-19.2	-1.5	-1.7	-3.7
Singapore	3,481	-0.2	21.1	-8.2	-1.0	9.6	-28.2	-2.7	-3.1	2.0
Indonesia	772	2.2	20.7	-7.9	-6.8	24.4	-39.4	8.7	-13.0	2.6
India	617	1.0	9.3	5.8	15.1	20.6	-31.1	1.2	0.6	3.5
Philippines	502	-1.2	9.5	-6.1	-2.6	19.8	-32.0	8.0	-0.7	1.0
Local Indices	Latest	1 Day	MTD	YTD	Q3 20	Q2 20	Q1 20	Oct-20	Sep-20	Aug-20
DJIA	29,872	Hol.	13.0	6.9	8.2	18.5	-22.7	-4.5	-2.2	7.9
	-									
Nasdaq	12,094	Hol.	10.9	35.9	11.2	30.9	-14.0	-2.3	-5.1	9.7
S&P 500	3,630	Hol.	11.2	14.2	8.9	20.5	-19.6	-2.7	-3.8	7.2
S&P 500 Euro Stoxx 600	3,630 392	Hol. -0.1	11.2 14.5	14.2 -3.4	8.9 0.7	20.5 13.8	-19.6 -22.5	-2.7 -5.1	-3.8 -1.4	7.2 3.1
S&P 500 Euro Stoxx 600 FTSE100	3,630 392 6,363	Hol. -0.1 -0.4	11.2 14.5 14.4	14.2 -3.4 -13.0	8.9 0.7 -4.0	20.5 13.8 9.1	-19.6 -22.5 -23.8	-2.7 -5.1 -4.7	-3.8 -1.4 -1.5	7.2 3.1 1.8
S&P 500 Euro Stoxx 600 FTSE100 DAX	3,630 392 6,363 13,287	Hol. -0.1 -0.4 0.0	11.2 14.5 14.4 15.0	14.2 -3.4 -13.0 0.3	8.9 0.7 -4.0 3.7	20.5 13.8 9.1 23.9	-19.6 -22.5 -23.8 -25.0	-2.7 -5.1 -4.7 -9.4	-3.8 -1.4 -1.5 -1.4	7.2 3.1 1.8 5.1
S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40	3,630 392 6,363 13,287 5,567	Hol. -0.1 -0.4 0.0 -0.1	11.2 14.5 14.4 15.0 21.2	14.2 -3.4 -13.0 0.3 -4.8	8.9 0.7 -4.0 3.7 -2.0	20.5 13.8 9.1 23.9 13.5	-19.6 -22.5 -23.8 -25.0 -26.1	-2.7 -5.1 -4.7 -9.4 -4.4	-3.8 -1.4 -1.5 -1.4 -2.7	7.2 3.1 1.8 5.1 3.4
S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB	3,630 392 6,363 13,287 5,567 22,201	Hol. -0.1 -0.4 0.0 -0.1 -0.5	11.2 14.5 14.4 15.0 21.2 23.8	14.2 -3.4 -13.0 0.3 -4.8 -3.5	8.9 0.7 -4.0 3.7 -2.0 -1.4	20.5 13.8 9.1 23.9 13.5 15.1	-19.6 -22.5 -23.8 -25.0 -26.1 -27.2	-2.7 -5.1 -4.7 -9.4 -4.4 -5.6	-3.8 -1.4 -1.5 -1.4 -2.7 -3.0	7.2 3.1 1.8 5.1 3.4 2.8
S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35	3,630 392 6,363 13,287 5,567 22,201 8,105	Hol. -0.1 -0.4 0.0 -0.1 -0.5 -0.7	11.2 14.5 14.4 15.0 21.2 23.8 25.7	14.2 -3.4 -13.0 0.3 -4.8 -3.5 -12.8	8.9 0.7 -4.0 3.7 -2.0 -1.4 -6.6	20.5 13.8 9.1 23.9 13.5 15.1 8.1	-19.6 -22.5 -23.8 -25.0 -26.1 -27.2 -28.6	-2.7 -5.1 -4.7 -9.4 -4.4 -5.6 -3.7	-3.8 -1.4 -1.5 -1.4 -2.7 -3.0 -3.6	7.2 3.1 1.8 5.1 3.4 2.8 1.3
S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	3,630 392 6,363 13,287 5,567 22,201 8,105 26,819	Hol. -0.1 -0.4 0.0 -0.1 -0.5 -0.7	11.2 14.5 14.4 15.0 21.2 23.8 25.7 11.3	14.2 -3.4 -13.0 0.3 -4.8 -3.5 -12.8 -1.8	8.9 0.7 -4.0 3.7 -2.0 -1.4 -6.6 -2.6	20.5 13.8 9.1 23.9 13.5 15.1 8.1 4.7	-19.6 -22.5 -23.8 -25.0 -26.1 -27.2 -28.6 -15.9	-2.7 -5.1 -4.7 -9.4 -4.4 -5.6 -3.7 2.8	-3.8 -1.4 -1.5 -1.4 -2.7 -3.0 -3.6 -6.4	7.2 3.1 1.8 5.1 3.4 2.8 1.3 2.5
S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	3,630 392 6,363 13,287 5,567 22,201 8,105 26,819 26,537	Hol. -0.1 -0.4 0.0 -0.1 -0.5 -0.7 0.6 0.9	11.2 14.5 14.4 15.0 21.2 23.8 25.7 11.3 15.5	14.2 -3.4 -13.0 0.3 -4.8 -3.5 -12.8 -1.8 14.2	8.9 0.7 -4.0 3.7 -2.0 -1.4 -6.6 -2.6 4.7	20.5 13.8 9.1 23.9 13.5 15.1 8.1 4.7	-19.6 -22.5 -23.8 -25.0 -26.1 -27.2 -28.6 -15.9 -19.2	-2.7 -5.1 -4.7 -9.4 -4.4 -5.6 -3.7 2.8 -0.9	-3.8 -1.4 -1.5 -1.4 -2.7 -3.0 -3.6 -6.4 0.8	7.2 3.1 1.8 5.1 3.4 2.8 1.3 2.5 6.6
S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI	3,630 392 6,363 13,287 5,567 22,201 8,105 26,819 26,537 352	Hol. -0.1 -0.4 0.0 -0.1 -0.5 -0.7 0.6 0.9	11.2 14.5 14.4 15.0 21.2 23.8 25.7 11.3 15.5	14.2 -3.4 -13.0 0.3 -4.8 -3.5 -12.8 -1.8 14.2 20.7	8.9 0.7 -4.0 3.7 -2.0 -1.4 -6.6 -2.6 4.7	20.5 13.8 9.1 23.9 13.5 15.1 8.1 4.7 18.0 18.6	-19.6 -22.5 -23.8 -25.0 -26.1 -27.2 -28.6 -15.9 -19.2	-2.7 -5.1 -4.7 -9.4 -4.4 -5.6 -3.7 2.8 -0.9 -2.5	-3.8 -1.4 -1.5 -1.4 -2.7 -3.0 -3.6 -6.4 0.8 0.9	7.2 3.1 1.8 5.1 3.4 2.8 1.3 2.5 6.6 2.6
S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities	3,630 392 6,363 13,287 5,567 22,201 8,105 26,819 26,537 352 Latest	Hol0.1 -0.4 0.0 -0.1 -0.5 -0.7 0.6 0.9 1.1 Day	11.2 14.5 14.4 15.0 21.2 23.8 25.7 11.3 15.5 16.7	14.2 -3.4 -13.0 0.3 -4.8 -3.5 -12.8 -1.8 14.2 20.7	8.9 0.7 -4.0 3.7 -2.0 -1.4 -6.6 -2.6 4.7 10.7	20.5 13.8 9.1 23.9 13.5 15.1 8.1 4.7 18.0 18.6	-19.6 -22.5 -23.8 -25.0 -26.1 -27.2 -28.6 -15.9 -19.2 -19.2	-2.7 -5.1 -4.7 -9.4 -4.4 -5.6 -3.7 2.8 -0.9 -2.5	-3.8 -1.4 -1.5 -1.4 -2.7 -3.0 -3.6 -6.4 0.8 0.9	7.2 3.1 1.8 5.1 3.4 2.8 1.3 2.5 6.6 2.6 Aug-20
S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent	3,630 392 6,363 13,287 5,567 22,201 8,105 26,819 26,537 352 Latest 47.8	Hol0.1 -0.4 -0.0 -0.1 -0.5 -0.7 -0.6 -0.9 1.1 Day -2.1	11.2 14.5 14.4 15.0 21.2 23.8 25.7 11.3 15.5 16.7 MTD 26.0	14.2 -3.4 -13.0 0.3 -4.8 -3.5 -12.8 -1.8 14.2 20.7 YTD -27.7	8.9 0.7 -4.0 3.7 -2.0 -1.4 -6.6 -2.6 4.7 10.7 Q3 20 -0.5	20.5 13.8 9.1 23.9 13.5 15.1 8.1 4.7 18.0 18.6 Q2 20 81.0	-19.6 -22.5 -23.8 -25.0 -26.1 -27.2 -28.6 -15.9 -19.2 -19.2 Q1 20 -66.8	-2.7 -5.1 -4.7 -9.4 -4.4 -5.6 -3.7 2.8 -0.9 -2.5 Oct-20 -7.5	-3.8 -1.4 -1.5 -1.4 -2.7 -3.0 -3.6 -6.4 0.8 0.9 Sep-20 -9.6	7.2 3.1 1.8 5.1 3.4 2.8 1.3 2.5 6.6 2.6 Aug-20 4.6
S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent WTI	3,630 392 6,363 13,287 5,567 22,201 8,105 26,819 26,537 352 Latest 47.8 45.0	Hol0.1 -0.4 -0.0 -0.1 -0.5 -0.7 -0.6 -0.9 -1.1 1 Day -2.1 -1.9	11.2 14.5 14.4 15.0 21.2 23.8 25.7 11.3 15.5 16.7 MTD 26.0 26.0	14.2 -3.4 -13.0 0.3 -4.8 -3.5 -12.8 -1.8 14.2 20.7 YTD -27.7 -26.3	8.9 0.7 -4.0 3.7 -2.0 -1.4 -6.6 -2.6 4.7 10.7 Q3 20 -0.5 1.5	20.5 13.8 9.1 23.9 13.5 15.1 8.1 4.7 18.0 18.6 Q2 20 81.0 91.7	-19.6 -22.5 -23.8 -25.0 -26.1 -27.2 -28.6 -15.9 -19.2 -19.2 Q1 20 -66.8 -66.8	-2.7 -5.1 -4.7 -9.4 -4.4 -5.6 -3.7 2.8 -0.9 -2.5 Oct-20 -7.5 -10.4	-3.8 -1.4 -1.5 -1.4 -2.7 -3.0 -3.6 -6.4 0.8 0.9 Sep-20 -9.6 -7.0	7.2 3.1 1.8 5.1 3.4 2.8 1.3 2.5 6.6 2.6 Aug-20 4.6 6.4
S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent WTI US 10Y yield	3,630 392 6,363 13,287 5,567 22,201 8,105 26,819 26,537 352 Latest 47.8 45.0 0.88	Hol0.1 -0.4 0.0 -0.1 -0.5 -0.7 0.6 0.9 1.1 1 Day -2.1 -1.9 Hol.	11.2 14.5 14.4 15.0 21.2 23.8 25.7 11.3 15.5 16.7 MTD 26.0 26.0 0.0	14.2 -3.4 -13.0 0.3 -4.8 -3.5 -12.8 -1.8 14.2 20.7 YTD -27.7 -26.3 -54.2	8.9 0.7 -4.0 3.7 -2.0 -1.4 -6.6 -2.6 4.7 10.7 Q3 20 -0.5 1.5 4.5	20.5 13.8 9.1 23.9 13.5 15.1 8.1 4.7 18.0 18.6 Q2 20 81.0 91.7 -5.7	-19.6 -22.5 -23.8 -25.0 -26.1 -27.2 -28.6 -15.9 -19.2 -19.2 Q1 20 -66.8 -66.8	-2.7 -5.1 -4.7 -9.4 -4.4 -5.6 -3.7 2.8 -0.9 -2.5 Oct-20 -7.5 -10.4 27.5	-3.8 -1.4 -1.5 -1.4 -2.7 -3.0 -3.6 -6.4 0.8 0.9 Sep-20 -9.6 -7.0 -4.2	7.2 3.1 1.8 5.1 3.4 2.8 1.3 2.5 6.6 2.6 Aug-20 4.6 6.4 30.9
S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent WTI	3,630 392 6,363 13,287 5,567 22,201 8,105 26,819 26,537 352 Latest 47.8 45.0	Hol0.1 -0.4 -0.0 -0.1 -0.5 -0.7 -0.6 -0.9 -1.1 1 Day -2.1 -1.9	11.2 14.5 14.4 15.0 21.2 23.8 25.7 11.3 15.5 16.7 MTD 26.0 26.0	14.2 -3.4 -13.0 0.3 -4.8 -3.5 -12.8 -1.8 14.2 20.7 YTD -27.7 -26.3	8.9 0.7 -4.0 3.7 -2.0 -1.4 -6.6 -2.6 4.7 10.7 Q3 20 -0.5 1.5	20.5 13.8 9.1 23.9 13.5 15.1 8.1 4.7 18.0 18.6 Q2 20 81.0 91.7	-19.6 -22.5 -23.8 -25.0 -26.1 -27.2 -28.6 -15.9 -19.2 -19.2 Q1 20 -66.8 -66.8	-2.7 -5.1 -4.7 -9.4 -4.4 -5.6 -3.7 2.8 -0.9 -2.5 Oct-20 -7.5 -10.4	-3.8 -1.4 -1.5 -1.4 -2.7 -3.0 -3.6 -6.4 0.8 0.9 Sep-20 -9.6 -7.0	7.2 3.1 1.8 5.1 3.4 2.8 1.3 2.5 6.6 2.6 Aug-20 4.6 6.4

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



DISCLAIMER

This document is produced by Eastspring Investments (Singapore) Limited and issued in:

- Singapore and Australia (for wholesale clients only) by Eastspring Investments (Singapore) Limited (UEN: 199407631H), which is incorporated in Singapore, is exempt from the requirement to hold an Australian financial services licence and is licensed and regulated by the Monetary Authority of Singapore under Singapore laws which differ from Australian laws.
- **Hong Kong** by Eastspring Investments (Hong Kong) Limited and has not been reviewed by the Securities and Futures Commission of Hong Kong.
- **Indonesia** by PT Eastspring Investments Indonesia, an investment manager that is licensed, registered and supervised by the Indonesia Financial Services Authority (OJK).
- Malaysia by Eastspring Investments Berhad (531241-U).
- United States of America (for institutional clients only) by Eastspring Investments (Singapore) Limited (UEN: 199407631H), which is incorporated in Singapore and is registered with the U.S Securities and Exchange Commission as a registered investment adviser.
- European Economic Area (for professional clients only) and Switzerland (for qualified investors only) by Eastspring Investments (Luxembourg) S.A., 26, Boulevard Royal, 2449 Luxembourg, Grand-Duchy of Luxembourg, registered with the Registre de Commerce et des Sociétés (Luxembourg), Register No B 173737.
- **United Kingdom (for professional clients only)** by Eastspring Investments (Luxembourg) S.A. UK Branch, 125 Old Broad Street, London EC2N 1AR.
- Chile (for institutional clients only) by Eastspring Investments (Singapore) Limited (UEN: 199407631H), which is incorporated in Singapore and is licensed and regulated by the Monetary Authority of Singapore under Singapore laws which differ from Chilean laws.

The afore-mentioned entities are hereinafter collectively referred to as Eastspring Investments.

The views and opinions contained herein may not necessarily represent views expressed or reflected in other Eastspring Investments' communications. This document is solely for information purposes and does not have any regard to the specific investment objective, financial situation and/or particular needs of any specific persons who may receive this document. This document is not intended as an offer, a solicitation of offer or a recommendation, to deal in shares of securities or any financial instruments. It may not be published, circulated, reproduced or distributed without the prior written consent of Eastspring Investments. Reliance upon information in this posting is at the sole discretion of the reader. Please consult your own professional adviser before investing.

Investment involves risk. Past performance and the predictions, projections, or forecasts on the economy, securities markets or the economic trends of the markets are not necessarily indicative of the future or likely performance of Eastspring Investments or any of the funds managed by Eastspring Investments.

Information herein is believed to be reliable at time of publication. Data from third party sources may have been used in the preparation of this material and Eastspring Investments has not independently verified, validated or audited such data. Where lawfully permitted, Eastspring Investments does not warrant its completeness or accuracy and is not responsible for error of facts or opinion nor shall be liable for damages arising out of any person's reliance upon this information. Any opinion or estimate contained in this document may subject to change without notice.

Eastspring Investments (excluding JV companies) companies are ultimately wholly-owned/indirect subsidiaries/associate of Prudential plc of the United Kingdom. Eastspring Investments companies (including JV's) and Prudential plc are not affiliated in any manner with Prudential Financial, Inc., a company whose principal place of business is in the United States of America.

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

