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유럽 증시는 내년 초 백신 배포에 대한 낙관론이 프랑스의 봉쇄 완화 가능성과 결합되면서 빠른 경제 회복에 대한 희망이 높아지며 상승세로 마감했습니다. STOXX 600은 0.9% 상승했습니다. 독일 증시는 거래소 운영 업체인 Deutsche Boerse가 블루칩 지수가 현재 30개 회사에서 40개로 확대 될 것이라고 밝힌 후 1.3% 상승했습니다. 데이터에 따르면 독일 경제는 3 분기에 기록적인 8.5% 성장률을 보였습니다

미국 증시는 투자자들이 2021년 백신 개발 진전 및 조 바이든의 대통령직 인수를 위한 공식적인 허가로 2021년 경제 회복을 예상하며 반등했고, 다우 지수는 3만 선을 돌파했습니다. 주요 11개 S&P 섹터 중 10개 섹터는 금융, 소재, 에너지 등 경제 민감주를 중심으로 상승했고 산업주는 사상 최고치를 기록했습니다. Tesla는 S&P 500에 편입될 예정으로 투자자들이 매입세를 증가시키면서 6% 상승, 시가 총액이 5,000억 달러를 뛰어 넘었습니다.

미 국채 장기 금리는 증시가 급등하는 등 투자자들이 위험자산으로 몰리면서 상승했습니다.

국제 유가는 세 번째 유망한 코로나바이러스 백신이 연료 수요 회복에 대한 희망을 높이고 조 바이든 미국 대통령 당선인의 백악관 입성이 확정되면서 크게 올라 3월 이후 최고치를 기록했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q3 20	Q2 20	Q1 20	Oct-20	Sep-20	Aug-20
World	620	1.4	12.7	12.0	8.3	19.4	-21.3	-2.4	-3.2	6.2
United States	3,532	1.6	11.7	16.7	9.6	21.8	-19.7	-2.6	-3.7	7.5
Europe	1,761	1.5	17.1	1.2	4.6	15.6	-24.2	-5.6	-3.3	4.1
Japan	3,698	2.0	12.2	10.1	7.1	11.6	-16.6	-1.6	1.1	7.6
Emerging Markets	1,226	0.5	11.1	12.4	9.7	18.2	-23.6	2.1	-1.6	2.2
Asia Pac Ex Japan	634	0.6	11.2	17.2	9.6	18.5	-20.7	2.4	-2.3	3.8
Asia Ex Japan	806	0.3	10.2	19.6	10.8	16.8	-18.4	2.8	-1.5	3.6
Australia	853	2.2	17.9	4.4	2.8	29.0	-33.2	0.0	-6.8	5.6
Hong Kong	11,847	1.4	13.9	3.2	1.6	9.2	-17.3	-1.2	-5.2	7.9
China H	108	0.4	5.6	29.6	12.6	15.4	-10.2	5.3	-2.7	5.7
China A	2,373	-0.4	6.9	34.0	15.4	15.8	-9.2	3.3	-4.3	4.8
Korea	588	0.4	18.6	25.1	12.9	19.6	-22.4	0.6	3.1	2.1
Taiwan	553	-0.7	11.6	30.3	17.1	21.5	-19.0	1.3	2.1	-1.7
Thailand	392	-1.7	25.3	-13.6	-14.0	23.8	-33.7	-2.3	-9.5	-2.2
Malaysia	321	-1.3	7.5	-0.3	2.6	13.6	-19.2	-1.5	-1.7	-3.7
Singapore	3,512	1.7	22.0	-7.6	-1.0	9.6	-28.2	-2.7	-3.1	2.0
Indonesia	759	0.6	18.7	-9.4	-6.8	24.4	-39.4	8.7	-13.0	2.6
India	618	0.8	9.5	6.0	15.1	20.6	-31.1	1.2	0.6	3.5
Philippines	518	-0.7	12.8	-3.3	-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	30,046	1.5	13.6	7.5	8.2	18.5	-22.7	-4.5	-2.2	7.9
Nasdaq	12,037	1.3	10.4	35.3	11.2	30.9	-14.0	-2.3	-5.1	9.7
S&P 500	3,635	1.6	11.3	14.4	8.9	20.5	-19.6	-2.7	-3.8	7.2
Euro Stoxx 600	392	0.9	14.7	-3.3	0.7	13.8	-22.5	-5.1	-1.4	3.1
FTSE100	6,432	1.6	15.6	-12.2	-4.0	9.1	-23.8	-4.7	-1.5	1.8
DAX	13,292	1.3	15.0	0.3	3.7	23.9	-25.0	-9.4	-1.4	5.1
CAC 40	5,558	1.2	21.0	-5.0	-2.0	13.5	-26.1	-4.4	-2.7	3.4
FTSE MIB	22,145	2.0	23.5	-3.7	-1.4	15.1	-27.2	-5.6	-3.0	2.8
Ibex 35	8,143	2.0	26.3	-12.4	-6.6	8.1	-28.6	-3.7	-3.6	1.3
Hang Seng	26,588	0.4	10.4	-2.7	-2.6	4.7	-15.9	2.8	-6.4	2.5
Nikkei	26,166	2.5	13.9	12.6	4.7	18.0	-19.2	-0.9	0.8	6.6
KOSPI	350	0.5	16.1	20.1	10.7	18.6	-19.2	-2.5	0.9	2.6
Bonds and Commodities	Latest	1 Day	MTD	YTD	Q3 20	Q2 20	Q1 20	Oct-20	Sep-20	Aug-20
Brent	47.8	4.3	26.0	-27.6	-0.5	81.0	-66.8	-7.5	-9.6	4.6
WTI	44.8	4.6	25.4	-26.6	1.5	91.7	-66.8	-10.4	-7.0	6.4
US 10Y yield	0.88	2.3	0.0	-54.2	4.5	-5.7	-63.2	27.5	-4.2	30.9
US 3M yield	0.09	12.5	0.0	-94.2	-37.5	45.5	-93.0	-10.0	-9.1	22.2
US 2Y yield	0.16	0.0	14.3	-89.9	-18.8	-30.4	-85.4	7.7	-7.1	27.3

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.

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