Daily Bulletin



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STOCKS | BONDS | INTEREST RATES | COMMODITIES | CURRENCIES

아시아 증시는 금요일 하락 마감 했습니다. 중국 증시는 당국의 경기부양 정책 이후 경제에 대한투자자의 낙관론이 약해지면서하락세로 돌아섰고, Luxshare Precision Industry Co. 는 약 3.5%급락했습니다. 한국의 주가는 대형칩 제조업체들의 손실로 하락세를보였고, SK 하이닉스는 4% 넘게하락했습니다. 일본 시장은 미국연준의 긴축 정책과 중국의 아이폰금지 조치에 대한 우려속에하락했고, 칩 제조 장비 대기업인도쿄 일렉트로닉스는 거의 4%하락했습니다.

유럽 증시는 이번주 미국 금리 인상과 유럽 경제 둔화 전망을 포함한과다한 우려가 심리를 뒤흔들면서투자자들이 타격을 입은 사치주 및기술주를 매수하면서 금요일 상승세를 보였습니다. 미디어 주식은 1%이상 상승한 반면 기초 자원 섹터는약 0.5% 하락했습니다. 영국 IT서비스 제공업체인 Computcenter의주가는 회사가 반기 실적 추정치를 상회하고 매출이 26.8% 증가했다고보고하면서 거의 15% 상승했습니다.

미국 증시는 금요일 애플과 마이크로 소프트를 포함한 메가 캡들이 금리 궤적에 대한 추가 단서를 제공할 다음주 새로운 인플레이션 수치를 앞두고 상승세를 보임에 따라 상승 마감했습니다. S&P 500의 11개 주요 섹터 중 8개 섹터가 에너지 업종의 상승에 힘입어 상승 마감했습니다. Kroger의 주가는 2분기 예상보다 나은 수익에 힘입어 약 3% 상승 했습니다. 그러나 Planet Labs는 2분기 예상보다 큰 손실을 보고한 후 거의 17% 급략했습니다.

미 국채 금리는 투자자들이 강력한 경제 지표 발표에 따른 추가 금리 인상 가능성을 평가함 에 따라 상승했습니다. 한편 기준이 되는 10년 만기 국채 수익률은 4.26%에 달했습니다.

국제 유가는 미국 디젤 선물의 상승과 사우디아라비아와 러시아가 이번 주에 자발적인 감산을 연장한 후 석유 공급 부족에 대한 우려로 상승했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q2 23	Q1 23	Q4 22	Aug-23	Jul-23	Jun-23
World	678	0.1	-1.1	13.9	6.3	7.4	9.9	-2.8	3.7	5.9
United States	4,243	0.1	-1.0	17.9	8.7	7.7	7.1	-1.7	3.4	6.7
Europe	1,865	0.3	-1.9	10.9	3.1	10.7	19.4	-4.0	3.1	4.8
Japan	3,513	-1.4	-0.3	13.5	6.4	6.4	13.3	-2.4	3.0	4.1
Emerging Markets	974	0.0	-0.6	4.2	1.0	4.0	9.8	-6.1	6.3	3.9
Asia Pac Ex Japan	503	0.0	-0.8	1.8	-0.9	4.1	12.2	-6.1	5.8	3.2
Asia Ex Japan	620	0.0	-0.4	2.2	-1.1	4.4	11.4	-6.4	6.2	2.8
Australia	813	0.1	-2.6	0.0	0.3	2.8	15.7	-4.3	4.0	5.1
Hong Kong	8,695	0.0	-1.9	-14.5	-5.0	-2.4	18.2	-8.6	2.8	3.4
China H	59	-0.2	-0.7	-5.2	-9.6	4.7	13.5	-9.0	10.9	4.0
China A	1,663	-0.7	-1.8	-9.6	-10.6	4.7	4.3	-7.9	6.8	-0.8
Korea	467	0.0	-0.7	12.0	4.5	9.7	18.5	-7.6	6.5	0.7
Taiwan	559	-0.4	-1.5	14.4	4.8	14.8	9.7	-4.4	1.0	2.0
Thailand	358	-0.1	-2.5	-7.4	-8.1	-1.6	16.1	-2.7	8.1	-2.0
Malaysia	246	-0.3	-0.6	-6.6	-8.4	-3.6	14.0	-3.1	9.7	-1.9
Singapore	2,941	-0.7	-1.9	-0.7	-5.6	7.1	10.5	-8.5	9.3	1.7
Indonesia	809	-0.8	-1.8	7.9	3.2	6.5	-3.5	-1.4	1.4	-0.2
India	835	0.9	2.9	9.6	12.4	-6.3	2.1	-1.9	3.0	4.8
Philippines	393	0.9	0.6	-4.2	-1.1	2.7	21.2	-9.2	3.3	2.0
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Local Indices	Latest	1 Day	MTD	YTD	Q2 23	Q1 23	Q4 22	Aug-23	Jul-23	Jun-23
DJIA	Latest 34,577	0.3	-0.4	6.0	4.0	0.9	16.0	-2.0	3.4	4.7
DJIA Nasdaq	34,577 13,762	0.3 0.1	-0.4 -1.9	6.0 32.3	4.0 13.1	0.9 17.0	16.0 -0.8	-2.0 -2.1	3.4 4.1	4.7 6.7
DJIA Nasdaq S&P 500	34,577 13,762 4,457	0.3 0.1 0.1	-0.4 -1.9 -1.1	6.0 32.3 17.4	4.0 13.1 8.7	0.9 17.0 7.5	16.0 -0.8 7.6	-2.0 -2.1 -1.6	3.4 4.1 3.2	4.7 6.7 6.6
DJIA Nasdaq S&P 500 Euro Stoxx 600	34,577 13,762 4,457 455	0.3 0.1 0.1 0.2	-0.4 -1.9 -1.1 -0.8	6.0 32.3 17.4 10.1	4.0 13.1 8.7 2.7	0.9 17.0 7.5 8.6	16.0 -0.8 7.6 9.9	-2.0 -2.1 -1.6 -2.5	3.4 4.1 3.2 2.2	4.7 6.7 6.6 2.4
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100	34,577 13,762 4,457 455 7,478	0.3 0.1 0.1 0.2 0.5	-0.4 -1.9 -1.1 -0.8 0.5	6.0 32.3 17.4 10.1 3.6	4.0 13.1 8.7 2.7 -0.3	0.9 17.0 7.5 8.6 3.6	16.0 -0.8 7.6 9.9 8.7	-2.0 -2.1 -1.6 -2.5 -2.5	3.4 4.1 3.2 2.2 2.3	4.7 6.7 6.6 2.4 1.4
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX	34,577 13,762 4,457 455 7,478 15,740	0.3 0.1 0.1 0.2 0.5 0.1	-0.4 -1.9 -1.1 -0.8 0.5 -1.3	6.0 32.3 17.4 10.1 3.6 13.0	4.0 13.1 8.7 2.7 -0.3 3.3	0.9 17.0 7.5 8.6 3.6 12.2	16.0 -0.8 7.6 9.9 8.7 14.9	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0	3.4 4.1 3.2 2.2 2.3 1.9	4.7 6.7 6.6 2.4 1.4 3.1
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40	34,577 13,762 4,457 455 7,478 15,740 7,241	0.3 0.1 0.1 0.2 0.5 0.1	-0.4 -1.9 -1.1 -0.8 0.5 -1.3	6.0 32.3 17.4 10.1 3.6 13.0	4.0 13.1 8.7 2.7 -0.3 3.3 3.5	0.9 17.0 7.5 8.6 3.6 12.2	16.0 -0.8 7.6 9.9 8.7 14.9	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0 -2.4	3.4 4.1 3.2 2.2 2.3 1.9	4.7 6.7 6.6 2.4 1.4 3.1 4.5
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB	34,577 13,762 4,457 455 7,478 15,740 7,241 28,233	0.3 0.1 0.1 0.2 0.5 0.1 0.6 0.3	-0.4 -1.9 -1.1 -0.8 0.5 -1.3 -1.0	6.0 32.3 17.4 10.1 3.6 13.0 15.0 23.8	4.0 13.1 8.7 2.7 -0.3 3.3 3.5 7.2	0.9 17.0 7.5 8.6 3.6 12.2 13.4	16.0 -0.8 7.6 9.9 8.7 14.9 12.6	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0 -2.4 -2.7	3.4 4.1 3.2 2.2 2.3 1.9 1.4 5.4	4.7 6.7 6.6 2.4 1.4 3.1 4.5
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35	34,577 13,762 4,457 455 7,478 15,740 7,241 28,233 9,365	0.3 0.1 0.1 0.2 0.5 0.1 0.6 0.3 0.6	-0.4 -1.9 -1.1 -0.8 0.5 -1.3 -1.0 -2.1 -1.5	6.0 32.3 17.4 10.1 3.6 13.0 15.0 23.8 17.5	4.0 13.1 8.7 2.7 -0.3 3.3 3.5 7.2 5.8	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0 -2.4 -2.7 -1.4	3.4 4.1 3.2 2.2 2.3 1.9 1.4 5.4	4.7 6.7 6.6 2.4 1.4 3.1 4.5 8.6 6.5
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	34,577 13,762 4,457 455 7,478 15,740 7,241 28,233 9,365 18,202	0.3 0.1 0.1 0.2 0.5 0.1 0.6 0.3 0.6 0.0	-0.4 -1.9 -1.1 -0.8 0.5 -1.3 -1.0 -2.1 -1.5	6.0 32.3 17.4 10.1 3.6 13.0 15.0 23.8 17.5 -5.0	4.0 13.1 8.7 2.7 -0.3 3.3 3.5 7.2 5.8 -6.0	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0 -2.4 -2.7 -1.4 -8.2	3.4 4.1 3.2 2.2 2.3 1.9 1.4 5.4 1.4 7.2	4.7 6.7 6.6 2.4 1.4 3.1 4.5 8.6 6.5 4.5
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	34,577 13,762 4,457 455 7,478 15,740 7,241 28,233 9,365 18,202 32,607	0.3 0.1 0.1 0.2 0.5 0.1 0.6 0.3 0.6 0.0 -1.2	-0.4 -1.9 -1.1 -0.8 0.5 -1.3 -1.0 -2.1 -1.5 -0.6 0.0	6.0 32.3 17.4 10.1 3.6 13.0 15.0 23.8 17.5 -5.0 26.5	4.0 13.1 8.7 2.7 -0.3 3.3 3.5 7.2 5.8 -6.0 18.5	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0 -2.4 -2.7 -1.4 -8.2 -1.6	3.4 4.1 3.2 2.2 2.3 1.9 1.4 5.4 1.4 7.2 0.0	4.7 6.7 6.6 2.4 1.4 3.1 4.5 8.6 6.5 4.5 7.6
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	34,577 13,762 4,457 455 7,478 15,740 7,241 28,233 9,365 18,202	0.3 0.1 0.1 0.2 0.5 0.1 0.6 0.3 0.6 0.0	-0.4 -1.9 -1.1 -0.8 0.5 -1.3 -1.0 -2.1 -1.5	6.0 32.3 17.4 10.1 3.6 13.0 15.0 23.8 17.5 -5.0	4.0 13.1 8.7 2.7 -0.3 3.3 3.5 7.2 5.8 -6.0	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0 -2.4 -2.7 -1.4 -8.2	3.4 4.1 3.2 2.2 2.3 1.9 1.4 5.4 1.4 7.2	4.7 6.7 6.6 2.4 1.4 3.1 4.5 8.6 6.5 4.5
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	34,577 13,762 4,457 455 7,478 15,740 7,241 28,233 9,365 18,202 32,607	0.3 0.1 0.1 0.2 0.5 0.1 0.6 0.3 0.6 0.0 -1.2	-0.4 -1.9 -1.1 -0.8 0.5 -1.3 -1.0 -2.1 -1.5 -0.6 0.0	6.0 32.3 17.4 10.1 3.6 13.0 15.0 23.8 17.5 -5.0 26.5	4.0 13.1 8.7 2.7 -0.3 3.3 3.5 7.2 5.8 -6.0 18.5	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0 -2.4 -2.7 -1.4 -8.2 -1.6	3.4 4.1 3.2 2.2 2.3 1.9 1.4 5.4 1.4 7.2 0.0	4.7 6.7 6.6 2.4 1.4 3.1 4.5 8.6 6.5 4.5 7.6
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI	34,577 13,762 4,457 455 7,478 15,740 7,241 28,233 9,365 18,202 32,607 336	0.3 0.1 0.1 0.2 0.5 0.1 0.6 0.3 0.6 0.0 -1.2	-0.4 -1.9 -1.1 -0.8 0.5 -1.3 -1.0 -2.1 -1.5 -0.6 0.0 -0.3	6.0 32.3 17.4 10.1 3.6 13.0 15.0 23.8 17.5 -5.0 26.5 18.9	4.0 13.1 8.7 2.7 -0.3 3.3 3.5 7.2 5.8 -6.0 18.5 6.9	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5 8.5	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8 5.3	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0 -2.4 -2.7 -1.4 -8.2 -1.6 -4.7	3.4 4.1 3.2 2.2 2.3 1.9 1.4 5.4 1.4 7.2 0.0 5.0	4.7 6.7 6.6 2.4 1.4 3.1 4.5 8.6 6.5 4.5 7.6
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities	34,577 13,762 4,457 455 7,478 15,740 7,241 28,233 9,365 18,202 32,607 336 Latest	0.3 0.1 0.1 0.2 0.5 0.1 0.6 0.3 0.6 0.0 -1.2 0.0	-0.4 -1.9 -1.1 -0.8 0.5 -1.3 -1.0 -2.1 -1.5 -0.6 0.0 -0.3	6.0 32.3 17.4 10.1 3.6 13.0 15.0 23.8 17.5 -5.0 26.5 18.9	4.0 13.1 8.7 2.7 -0.3 3.3 3.5 7.2 5.8 -6.0 18.5 6.9 Q2 23	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5 8.5 11.5	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8 5.3	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0 -2.4 -2.7 -1.4 -8.2 -1.6 -4.7 Aug-23	3.4 4.1 3.2 2.2 2.3 1.9 1.4 5.4 1.4 7.2 0.0 5.0	4.7 6.7 6.6 2.4 1.4 3.1 4.5 8.6 6.5 4.5 7.6 -0.3
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent	34,577 13,762 4,457 455 7,478 15,740 7,241 28,233 9,365 18,202 32,607 336 Latest	0.3 0.1 0.1 0.2 0.5 0.1 0.6 0.3 0.6 0.0 -1.2 0.0 1 Day	-0.4 -1.9 -1.1 -0.8 0.5 -1.3 -1.0 -2.1 -1.5 -0.6 0.0 -0.3 MTD	6.0 32.3 17.4 10.1 3.6 13.0 15.0 23.8 17.5 -5.0 26.5 18.9 YTD 5.4 8.3	4.0 13.1 8.7 2.7 -0.3 3.3 3.5 7.2 5.8 -6.0 18.5 6.9 Q2 23 -5.8 -5.6	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5 8.5 11.5 Q1 23 -7.6 -7.1	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8 5.3 Q4 22 -2.2 -1.5	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0 -2.4 -2.7 -1.4 -8.2 -1.6 -4.7 Aug-23	3.4 4.1 3.2 2.2 2.3 1.9 1.4 5.4 1.4 7.2 0.0 5.0 Jul-23	4.7 6.7 6.6 2.4 1.4 3.1 4.5 8.6 6.5 4.5 7.6 -0.3 Jun-23
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ilbex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent WTI	34,577 13,762 4,457 455 7,478 15,740 7,241 28,233 9,365 18,202 32,607 336 Latest 90.7 87.2 4.26	0.3 0.1 0.1 0.2 0.5 0.1 0.6 0.3 0.6 0.0 -1.2 0.0 1 Day	-0.4 -1.9 -1.1 -0.8 0.5 -1.3 -1.0 -2.1 -1.5 -0.6 0.0 -0.3 MTD 4.4 4.4 4.2	6.0 32.3 17.4 10.1 3.6 13.0 15.0 23.8 17.5 -5.0 26.5 18.9 YTD	4.0 13.1 8.7 2.7 -0.3 3.3 3.5 7.2 5.8 -6.0 18.5 6.9 Q2 23	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5 8.5 11.5 Q1 23 -7.6 -7.1 -10.3	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8 5.3 Q4 22 -1.5 1.3	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0 -2.4 -2.7 -1.4 -8.2 -1.6 -4.7 Aug-23 1.5 2.2 3.0	3.4 4.1 3.2 2.2 2.3 1.9 1.4 5.4 1.4 7.2 0.0 5.0 Jul-23	4.7 6.7 6.6 2.4 1.4 3.1 4.5 8.6 6.5 4.5 7.6 -0.3 Jun-23 3.2 3.7 4.7
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ilbex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent WTI US 10Y yield	34,577 13,762 4,457 455 7,478 15,740 7,241 28,233 9,365 18,202 32,607 336 Latest 90.7 87.2	0.3 0.1 0.1 0.2 0.5 0.1 0.6 0.3 0.6 0.0 -1.2 0.0 1 Day	-0.4 -1.9 -1.1 -0.8 0.5 -1.3 -1.0 -2.1 -1.5 -0.6 0.0 -0.3 MTD	6.0 32.3 17.4 10.1 3.6 13.0 15.0 23.8 17.5 -5.0 26.5 18.9 YTD 5.4 8.3 9.8	4.0 13.1 8.7 2.7 -0.3 3.3 3.5 7.2 5.8 -6.0 18.5 6.9 Q2 23 -5.8 -5.6 9.5	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5 8.5 11.5 Q1 23 -7.6 -7.1	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8 5.3 Q4 22 -2.2 -1.5	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0 -2.4 -2.7 -1.4 -8.2 -1.6 -4.7 Aug-23	3.4 4.1 3.2 2.2 2.3 1.9 1.4 5.4 1.4 7.2 0.0 5.0 Jul-23 14.2 15.8 4.2	4.7 6.7 6.6 2.4 1.4 3.1 4.5 8.6 6.5 4.5 7.6 -0.3 Jun-23

Source: Eastspring Investments (Singapore) Limited., MSCI in USD terms. Local indices are in local currency terms. MTD stands for month to date. YTD stands for year to date. NA represents not available.

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