

아시아 증시는 금요일 혼조세로 마감했습니다. 중국 증시는 정부의 감세 제안에 따라 금융주 주도로 상승했습니다. 한국의 주가는 미국 실업률 전망 보고서와 5월 개인 급여 수치가 인플레이션에 대한 우려를 키우며 하락했습니다. 일본 시장은 투자자들이 인플레이션에 대한 우려와 연준(Fed)의 테이퍼링 논의를 위한 미국의 주요 고용 지표를 기다리면서 성장주가 약세를 보이며 혼조세로 마감했습니다. 호주 증시는 예상을 상회한 경제 성장률로 은행주가 랠리를 이어 가며 상승세를 보였습니다.

유럽 증시는 미국 고용 지표 약세로 인해 조기 긴축 가능성이 낮아진 반면 유로존 경기 회복에 대한 낙관론이 대부분의 섹터를 부양하면서 상승했습니다. 반도체 기업 AMS 주도로 기술주가 가장 큰 상승폭을 보였습니다. AMS의 주가는 북미 디지털 시스템 사업을 Acquity Brands에 매각한다고 발표한 후 4% 이상 급등했습니다. 한편, IAG, Wizz Air, easyJet의 주가는 영국이 포르투갈을 여행 가능국 목록에서 제외시키고 7개국을 여행 금지국 목록에 추가한 후 하락했습니다.

미국 증시는 연준 (FRB)이 조만간 통화 부양을 억제할 수 있는 투자자들의 우려를 덜어준 후 금요일 기술주를 중심으로 상승했습니다. 기업들은 5월에 고용을 늘렸고, 채용을 위해 경쟁하면서 임금을 올렸습니다. 하지만 비농업 부문 55만 9천 개의 일자리 상승은 기대치를 하회했습니다. 한편, 역만장자 윌리엄 애크먼의 Pershing Square Tontine Holdings의 주가는 Universal Music Group의 지분 10% 인수 협상 뉴스가 전해지며 하락했습니다.

미국채 금리는 지난 5월 실업률이 기대에 못 미치며 경제 호황이 더 빠른 통화정책 긴축으로 이어질 수 있다는 우려를 잠재우며 금요일 큰 폭 하락했고 장단기 금리차이는 축소되었습니다.

국제 유가는 OPEC+의 감산 원칙과 원유 수요 회복이 전세계 불균형한 백신 보급에 대한 우려를 상쇄하면서 브렌트유가 2019년 이후 처음으로 배럴당 72달러를 돌파하면서 금요일 상승했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q1 21	Q4 20	Q3 20	May-21	Apr-21	Mar-21
World	716	0.7	0.7	11.9	4.7	14.8	8.3	1.6	4.4	2.7
United States	4,098	0.9	0.6	12.4	5.5	13.2	9.6	0.5	5.4	3.8
Europe	2,074	0.6	0.9	14.8	4.2	15.7	4.6	4.3	4.7	3.2
Japan	3,948	0.6	1.7	3.4	1.7	15.3	7.1	1.6	-1.5	1.2
Emerging Markets	1,382	-0.1	0.4	7.8	2.3	19.8	9.7	2.3	2.5	-1.5
Asia Pac Ex Japan	705	0.0	0.1	7.3	2.8	19.2	9.6	1.5	2.8	-2.1
Asia Ex Japan	891	-0.3	-0.2	6.4	2.8	18.7	10.8	1.2	2.5	-2.5
Australia	997	1.3	1.9	14.2	3.4	22.9	2.8	3.2	4.9	0.7
Hong Kong	13,294	0.1	-0.9	11.1	7.3	15.5	1.6	1.3	3.1	0.4
China H	109	-0.1	-0.6	1.1	-0.4	11.2	12.6	0.8	1.4	-6.3
China A	2,669	0.8	-0.8	5.3	-4.2	18.2	15.4	6.3	4.3	-6.3
Korea	708	-0.6	0.5	5.8	1.8	38.6	12.9	0.4	3.0	0.3
Taiwan	704	-0.6	-0.6	17.4	11.0	23.2	17.1	-1.2	7.7	-0.4
Thailand	408	-1.1	0.6	3.5	4.4	25.5	-14.0	-0.5	-0.9	2.5
Malaysia	310	-0.9	-0.4	-4.8	-5.8	10.1	2.6	-1.9	3.4	-2.0
Singapore	3,862	-0.2	-0.6	11.6	8.9	18.9	-1.0	-0.1	3.2	5.1
Indonesia	732	-1.1	2.2	-4.3	-7.5	31.8	-6.8	1.3	-0.1	-6.2
India	768	0.0	0.9	14.3	5.2	21.2	15.1	8.7	-0.9	2.3
Philippines	498	0.3	2.4	-3.2	-10.4	22.3	-2.6	5.6	-0.2	-4.5
Local Indices	Latest	1 Day	MTD	YTD	Q1 21	Q4 20	Q3 20	May-21	Apr-21	Mar-21
DJIA	34,756	0.5	0.7	14.5	8.3	10.7	8.2	2.2	2.8	6.8
Nasdaq	13,814	1.5	0.5	7.5	3.0	15.6	11.2	-1.4	5.4	0.5
S&P 500	4,230	0.9	0.6	13.3	6.2	12.1	8.9	0.7	5.3	4.4
Euro Stoxx 600	453	0.4	1.4	15.4	8.3	10.9	0.7	2.7	2.3	6.5
FTSE100	7,069	0.1	0.7	11.3	5.0	10.9	-4.0	1.1	4.1	4.2
DAX	15,693	0.4	1.8	14.4	9.4	7.5	3.7	1.9	0.8	8.9
CAC 40	6,516	0.1	1.1	19.4	9.6	15.8	-2.0	4.0	3.6	6.5
FTSE MIB	25,570	0.5	1.6	16.7	11.3	17.0	-1.4	5.2	-1.9	7.9
Ibex 35	9,088	-0.6	-0.4	13.8	6.7	21.2	-6.6	3.9	3.0	4.4
Hang Seng	28,908	-0.1	-0.7	7.4	4.5	16.2	-2.6	2.1	1.3	-1.8
Nikkei	28,942	-0.4	0.3	6.2	7.0	18.5	4.7	0.2	-1.3	1.4
KOSPI	432	-0.4	1.0	11.9	7.5	27.1	10.7	1.3	1.8	2.1
Bonds and Commodities	Latest	1 Day	MTD	YTD	Q1 21	Q4 20	Q3 20	May-21	Apr-21	Mar-21
Brent	71.9	0.7	3.7	38.8	21.7	26.5	-0.5	4.0	5.8	-2.2
WTI	69.4	0.7	3.7	43.3	23.1	21.5	1.5	5.4	6.5	-3.3
US 10Y yield	1.56	-4.3	-1.3	67.7	87.1	34.8	4.5	-4.2	-5.2	20.8
US 3M yield	0.02	0.0	100.0	-77.8	-66.7	-10.0	-37.5	0.0	-66.7	-25.0
US 2Y yield	0.14	-12.5	0.0	7.7	23.1	0.0	-18.8	-12.5	0.0	14.3

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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