

**아시아 증시**는 혼조세로 마감했습니다. 중국 증시는 지난 5월 수입이 10년 만에 가장 빠른 속도로 증가했다는 무역 데이터에 투자자들이 반응한 반면 수출 증가율은 예상을 빗나가며 방향성을 상실한 모습이었습니다. 한국의 주가는 미국의 고용지표 호조에 따라 상승했지만 인플레이션 데이터 발표를 앞두고 상승폭은 제한되었습니다. 대만 시장은 팬데믹 제한 조치를 2주 연장하면서 하락했습니다. 인도 증시는 감염의 감소 추세로 인해 봉쇄가 완화될 것이라는 기대감으로 상승했습니다.

**유럽 증시**는 자동차 기업들의 또 다른 상승세가 중국의 수출 실적 하락으로 촉발된 상품 관련 주식의 초반 하락을 상쇄하면서 사상 최고치를 기록했습니다. 데이터에 따르면 4월 독일의 산업 주주는 공급망 혼선이 제조업체들의 발목을 잡으면서 내수 감소로 인해 예상치 못한 감소세를 보였습니다. 은행주들은 정책입안자들이 완화적 정책 기조를 고수할 것으로 예상되는 목요일 ECB 회의를 앞두고 국내 금리가 거의 한 달내 최저치에 근접하면서 대체로 상승했습니다.

**미국 증시**는 방향성이 없는 모습을 보였습니다. S&P 500 지수는 투자자들이 글로벌 최저 법인세율, 지속되는 인플레이션 우려, 그리고 시장을 움직이는 경제 뉴스 부족으로 인해 하락했습니다. S&P 500의 11개 주요 섹터 중 7개가 하락했습니다. 다우존스도 하락한 반면 나스닥은 상승했습니다. Biogen은 FDA가 알츠하이머 치료제를 승인했다는 소식에 38% 이상 급등했고, 데이터 센터 운영사인 QTS Realty는 블랙스톤 그룹의 인수 거래 소식에 21% 이상 급등했습니다.

**미 국채 금리**는 투자자들이 곧 있을 국채 발행 결과에 주목하며 거의 변동이 없었고, 연준(FRB)의 역 매입 채권은 기록적인 규모를 보였습니다.

**국제 유가**는 수요 개선 기대와 OPEC의 공급 억제 조치로 인해 2년 만에 최고치를 기록한 후 하락했습니다. OPEC 의장은 해당 기구가 앞으로 몇 달 안에 재고가 더 감소할 것으로 예상한다고 언급했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q1 21	Q4 20	Q3 20	May-21	Apr-21	Mar-21
World	717	0.1	0.8	12.0	4.7	14.8	8.3	1.6	4.4	2.7
United States	4,098	0.0	0.6	12.4	5.5	13.2	9.6	0.5	5.4	3.8
Europe	2,084	0.5	1.3	15.3	4.2	15.7	4.6	4.3	4.7	3.2
Japan	3,960	0.3	2.0	3.7	1.7	15.3	7.1	1.6	-1.5	1.2
Emerging Markets	1,381	-0.1	0.4	7.8	2.3	19.8	9.7	2.3	2.5	-1.5
Asia Pac Ex Japan	704	-0.1	0.0	7.2	2.8	19.2	9.6	1.5	2.8	-2.1
Asia Ex Japan	890	-0.1	-0.3	6.3	2.8	18.7	10.8	1.2	2.5	-2.5
Australia	997	0.0	1.9	14.3	3.4	22.9	2.8	3.2	4.9	0.7
Hong Kong	13,254	-0.3	-1.1	10.8	7.3	15.5	1.6	1.3	3.1	0.4
China H	109	-0.5	-1.1	0.6	-0.4	11.2	12.6	0.8	1.4	-6.3
China A	2,665	-0.1	-0.9	5.2	-4.2	18.2	15.4	6.3	4.3	-6.3
Korea	711	0.5	0.9	6.3	1.8	38.6	12.9	0.4	3.0	0.3
Taiwan	701	-0.4	-0.9	17.0	11.0	23.2	17.1	-1.2	7.7	-0.4
Thailand	410	0.3	0.9	3.8	4.4	25.5	-14.0	-0.5	-0.9	2.5
Malaysia	310	Hol.	-0.4	-4.8	-5.8	10.1	2.6	-1.9	3.4	-2.0
Singapore	3,901	1.0	0.4	12.7	8.9	18.9	-1.0	-0.1	3.2	5.1
Indonesia	731	-0.1	2.1	-4.4	-7.5	31.8	-6.8	1.3	-0.1	-6.2
India	774	0.8	1.6	15.1	5.2	21.2	15.1	8.7	-0.9	2.3
Philippines	497	-0.2	2.2	-3.4	-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	34,630	-0.4	0.3	14.1	8.3	10.7	8.2	2.2	2.8	6.8
Nasdaq	13,882	0.5	1.0	8.0	3.0	15.6	11.2	-1.4	5.4	0.5
S&P 500	4,227	-0.1	0.6	13.3	6.2	12.1	8.9	0.7	5.3	4.4
Euro Stoxx 600	454	0.2	1.6	15.7	8.3	10.9	0.7	2.7	2.3	6.5
FTSE100	7,077	0.1	0.9	11.4	5.0	10.9	-4.0	1.1	4.1	4.2
DAX	15,677	-0.1	1.7	14.3	9.4	7.5	3.7	1.9	0.8	8.9
CAC 40	6,544	0.5	1.6	19.9	9.6	15.8	-2.0	4.0	3.6	6.5
FTSE MIB	25,825	1.0	2.6	17.8	11.3	17.0	-1.4	5.2	-1.9	7.9
Ibex 35	9,164	0.8	0.4	14.7	6.7	21.2	-6.6	3.9	3.0	4.4
Hang Seng	28,812	-0.5	-1.1	6.9	4.5	16.2	-2.6	2.1	1.3	-1.8
Nikkei	29,019	0.3	0.6	6.4	7.0	18.5	4.7	0.2	-1.3	1.4
KOSPI	433	0.2	1.3	12.2	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	71.5	-0.6	3.1	38.0	21.7	26.5	-0.5	4.0	5.8	-2.2
WTI	69.2	-0.2	3.5	43.0	23.1	21.5	1.5	5.4	6.5	-3.3
US 10Y yield	1.57	0.6	-0.6	68.8	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	0.16	14.3	14.3	23.1	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.

For more information contact: [content@eastspring.com](mailto: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](mailto:content@eastspring.com) | T: +65 6349 9100