dailybulletin

STOCKS | BONDS | INTEREST RATES | COMMODITIES | CURRENCIES

아시아 증시는 대체로 하락세로 마감했습니다. 중국 증시는 투자자 들이 높은 밸류에이션과 중-미간 긴장에 대해 우려하며 소비재 및 주류 기업들이 약세를 보이며 하락 했습니다. 한국의 주가는 투자자들 이 미국의 주요 인플레이션 데이터 를 기다리며 기술주에 의해 하락 마감했습니다. 일본 닛케이 지수는 소프트뱅크를 포함한 대형주들의 약세로 하락했고, 제약회사들의 반등으로 인해 TOPIX 지수는 상승했습니다. 한편 호주의 주가는 기술주와 헬스케어주를 중심으로 상승했습니다. 유럽 증시는 여행 및 부동산주에 의해 상승하며 최고치를 경신 했지만, 독일 산업 생산량 자료의 약세와 이달 말 영국이 규제를 철폐한 것에 대한 의구심이 상승폭 을 제한했습니다. 독일 증시는 반도체 부족과 기타 공급 병목현상 이 경기 회복을 방해하고 있다는 추가적인 징후 속에 지난 4월 산업생산이 예상 외로 감소한 것으로 나타나면서 하락했습니다. 영국의 FTSE 100 지수는 파운드 화 약세와 수익 전망치를 높인 British American Tobacco의 주가 강세에 힘입어 상승했습니다. 미국 증시는 뚜렷한 시장 촉매의 부족으로 기관 투자가들은 방관하고 있는 반면 개인 투자자 들은 현재 진행중인 밈 주식의 반등을 부채질하며 방향성을 잃은 모습이었습니다. 기술주 중심의 나스닥은 아마존과 애플이 가장 큰 상승폭을 보인 가운데 가장 높은 상승률을 보였습니다. Clover Health는 밈 주식 중 최고 매출을 보이며 85% 이상 급등 했습니다. 한편 노동부와 전국 독립 기업 연합회의 보고에 따르면 임금 상승 압력을 가할 수 있는 노동력 부족이 확인됐습니다.

등의 자신감이 떨어졌다는 보고서 발표 이후 한달 내 최저치를 기록한 반면 금리 곡선 일부의 스프레드는 축소되었습니다.
국제 유가는 미국 외교관이 이란 과 핵 협상이 타결되더라도 수백 건의 제재조치는 그대로 유지될 것이라고 말한 후 상승했습니다. 이는 이란산 원유 공급이 조만간 시장에 재도입되지는 않을

것이라는 것을 의미합니다.

미 구채 자기 그리느 소사고이

MSCI	Latest	1 Day	MTD	YTD	Q1 21	Q4 20	Q3 20	May-21	Apr-21	Mar-21
World	717	0.0	0.8	12.0	4.7	14.8	8.3	1.6	4.4	2.7
United States	4,099	0.0	0.6	12.5	5.5	13.2	9.6	0.5	5.4	3.8
Europe	2,085	0.1	1.4	15.4	4.2	15.7	4.6	4.3	4.7	3.2
Japan	3,956	-0.1	1.9	3.6	1.7	15.3	7.1	1.6	-1.5	1.2
Emerging Markets	1,377	-0.2	0.2	7.5	2.3	19.8	9.7	2.3	2.5	-1.5
Asia Pac Ex Japan	703	-0.2	-0.2	7.1	2.8	19.2	9.6	1.5	2.8	-2.1
Asia Ex Japan	888	-0.2	-0.5	6.1	2.8	18.7	10.8	1.2	2.5	-2.5
Australia	997	0.0	1.9	14.2	3.4	22.9	2.8	3.2	4.9	0.7
Hong Kong	13,259	0.0	-1.1	10.8	7.3	15.5	1.6	1.3	3.1	0.4
China H	108	-0.3	-1.4	0.3	-0.4	11.2	12.6	0.8	1.4	-6.3
China A	2,637	-1.1	-2.0	4.1	-4.2	18.2	15.4	6.3	4.3	-6.3
Korea	710	-0.1	0.8	6.1	1.8	38.6	12.9	0.4	3.0	0.3
Taiwan	700	-0.1	-1.1	16.8	11.0	23.2	17.1	-1.2	7.7	-0.4
Thailand	409	-0.1	0.8	3.7	4.4	25.5	-14.0	-0.5	-0.9	2.5
Malaysia	312	0.9	0.4	-4.0	-5.8	10.1	2.6	-1.9	3.4	-2.0
Singapore	3,892	-0.2	0.2	12.5	8.9	18.9	-1.0	-0.1	3.2	5.1
Indonesia	723	-1.0	1.0	-5.4	-7.5	31.8	-6.8	1.3	-0.1	-6.2
India	774	0.1	1.7	15.2	5.2	21.2	15.1	8.7	-0.9	2.3
Philippines	500	0.7	2.9	-2.8	-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	34,600	-0.1	0.2	14.0	8.3	10.7	8.2	2.2	2.8	6.8
Nasdaq	13,925	0.3	1.3	8.4	3.0	15.6	11.2	-1.4	5.4	0.5
S&P 500	4,227	0.0	0.6	13.3	6.2	12.1	8.9	0.7	5.3	4.4
Euro Stoxx 600	454	0.1	1.7	15.8	8.3	10.9	0.7	2.7	2.3	6.5
FTSE100	7,095	0.3	1.1	11.7	5.0	10.9	-4.0	1.1	4.1	4.2
DAX	15,641	-0.2	1.4	14.0	9.4	7.5	3.7	1.9	0.8	8.9
CAC 40	6,551	0.1	1.7	20.1	9.6	15.8	-2.0	4.0	3.6	6.5
FTSE MIB	25,809	-0.1	2.5	17.7	11.3	17.0	-1.4	5.2	-1.9	7.9
lbex 35	9,154	-0.1	0.3	14.6	6.7	21.2	-6.6	3.9	3.0	4.4
Hang Seng	28,773	0.0	-1.1	6.9	4.5	16.2	-2.6	2.1	1.3	-1.8
Nikkei	28,964	-0.2	0.4	6.2	7.0	18.5	4.7	0.2	-1.3	1.4
KOSPI	433	-0.1	1.2	12.1	7.5	27.1	10.7	1.3	1.8	2.1
Bonds and Commodities		1 Day	MTD	YTD	Q1 21	Q4 20	Q3 20	May-21	Apr-21	Mar-21
Brent	72.1	0.9	4.0	39.2	21.7	26.5	-0.5	4.0	5.8	-2.2
	70.0	1 1	16	116	<u> </u>			E /	6 5	
WTI	70.0	1.1	4.6	44.6	23.1	21.5	1.5	5.4	6.5	-3.3
US 10Y yield	1.53	-2.5	-3.2	64.5	87.1	34.8	4.5	-4.2	-5.2	20.8

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 | 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.

