

아시아 증시는 혼조세로 마감했습니다. 중국 증시는 주요 7개국 정상들이 아시아 국가들을 다양한 이슈로 문제 삼은 후 중국과 서방 간 긴장이 투자심리를 악화시키며 하락했습니다. 한국의 주가는 상승했지만, 투자자들이 연준의 정책회의를 앞두고 조심스러운 입장을 유지하며 상승폭은 제한되었습니다. 일본 시장은 기술주와 성장주 주도로 상승했고 제약회사들은 상승세를 이어갔습니다. 인도 증시는 감염 감소로 인해 지방주들이 다시 비즈니스를 재개함에 따라 사상 최고치로 마감했습니다.

유럽 증시는 올해 경기 회복에 대한 낙관론에 힘입어 상승했지만 Fed의 정책회의를 앞두고 투자자들이 주춤하면서 상승폭은 제한되었습니다. 보험주는 실적이 가장 좋은 섹터에 속했고, 기초 자원주는 기초 금속 가격을 추적하며 하락했습니다. 여행 및 레저주는 보리스 존슨 총리가 나머지 제한 조치를 해제하려는 계획을 연기한 후 하락했지만, 영국에서는 규제가 부분적으로 완화되면서 5월에도 고용된 노동자 숫자는 기록적인 증가를 기록했습니다.

미국 증시는 5월 물가상승률과 소매판매 부진을 보여주는 데이터들이 연준의 정책회의 결과를 긴장감 속에 기다리는 투자자들을 더욱 불안하게 하면서 하락세로 마감했습니다. 11개 주요 S&P 섹터 중 대다수는 하락했고, 에너지 지수는 국제 유가가 수요 호조 전망으로 상승하며 수년 내 최고치를 기록했습니다. 기업 관련으로는 보잉의 주가가 미국과 유럽연합이 항공기 제작사이자 경쟁사인 에어버스와 관련된 항공기 보조금 문제로 인한 17년간의 분쟁에서 휴전에 합의한 후 상승했습니다.

미국채 금리는 수요일 이틀간 열리는 연준(FRB) 회의를 앞두고 안정세를 보였는데, 연준(FRB)이 언제 대규모 채권 매입 프로그램을 시작할지에 대한 신호를 시장이 계속 주시할 것으로 예상됩니다.

국제 유가는 2021년 하반기에 원유 수요가 빠르게 회복될 것이라는 기대감에 힘입어 2년여 만에 최고치를 기록했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q1 21	Q4 20	Q3 20	May-21	Apr-21	Mar-21
World	720	-0.1	1.3	12.5	4.7	14.8	8.3	1.6	4.4	2.7
United States	4,121	-0.3	1.2	13.1	5.5	13.2	9.6	0.5	5.4	3.8
Europe	2,100	0.2	2.2	16.3	4.2	15.7	4.6	4.3	4.7	3.2
Japan	3,966	0.8	2.1	3.9	1.7	15.3	7.1	1.6	-1.5	1.2
Emerging Markets	1,378	-0.4	0.3	7.6	2.3	19.8	9.7	2.3	2.5	-1.5
Asia Pac Ex Japan	704	-0.1	0.0	7.3	2.8	19.2	9.6	1.5	2.8	-2.1
Asia Ex Japan	889	-0.2	-0.3	6.2	2.8	18.7	10.8	1.2	2.5	-2.5
Australia	1,000	0.5	2.2	14.6	3.4	22.9	2.8	3.2	4.9	0.7
Hong Kong	13,101	-1.1	-2.3	9.5	7.3	15.5	1.6	1.3	3.1	0.4
China H	108	-0.8	-1.9	-0.2	-0.4	11.2	12.6	0.8	1.4	-6.3
China A	2,613	-1.0	-2.8	3.2	-4.2	18.2	15.4	6.3	4.3	-6.3
Korea	711	0.2	1.0	6.3	1.8	38.6	12.9	0.4	3.0	0.3
Taiwan	715	0.7	1.1	19.3	11.0	23.2	17.1	-1.2	7.7	-0.4
Thailand	413	-1.0	1.8	4.7	4.4	25.5	-14.0	-0.5	-0.9	2.5
Malaysia	311	-0.1	0.2	-4.2	-5.8	10.1	2.6	-1.9	3.4	-2.0
Singapore	3,897	0.7	0.3	12.6	8.9	18.9	-1.0	-0.1	3.2	5.1
Indonesia	724	-0.1	1.8	-4.7	-7.5	31.8	-6.8	1.3	-0.1	-6.2
India	776	0.2	2.0	15.6	5.2	21.2	15.1	8.7	-0.9	2.3
Philippines	510	0.5	4.9	-0.9	-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	34,299	-0.3	-0.6	13.1	8.3	10.7	8.2	2.2	2.8	6.8
Nasdaq	14,073	-0.7	2.4	9.5	3.0	15.6	11.2	-1.4	5.4	0.5
S&P 500	4,247	-0.2	1.1	13.8	6.2	12.1	8.9	0.7	5.3	4.4
Euro Stoxx 600	459	0.1	2.8	17.0	8.3	10.9	0.7	2.7	2.3	6.5
FTSE100	7,172	0.4	2.2	12.9	5.0	10.9	-4.0	1.1	4.1	4.2
DAX	15,730	0.4	2.0	14.7	9.4	7.5	3.7	1.9	0.8	8.9
CAC 40	6,640	0.4	3.1	21.8	9.6	15.8	-2.0	4.0	3.6	6.5
FTSE MIB	25,737	-0.1	2.2	17.4	11.3	17.0	-1.4	5.2	-1.9	7.9
Ibex 35	9,231	-0.5	1.2	15.6	6.7	21.2	-6.6	3.9	3.0	4.4
Hang Seng	28,638	-0.7	-1.6	6.4	4.5	16.2	-2.6	2.1	1.3	-1.8
Nikkei	29,441	1.0	2.0	8.0	7.0	18.5	4.7	0.2	-1.3	1.4
KOSPI	434	0.2	1.5	12.4	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	74.3	1.6	7.1	43.4	21.7	26.5	-0.5	4.0	5.8	-2.2
WTI	72.5	1.9	8.3	49.7	23.1	21.5	1.5	5.4	6.5	-3.3
US 10Y yield	1.51	0.0	-4.4	62.4	87.1	34.8	4.5	-4.2	-5.2	20.8
US 3M yield	0.03	0.0	200.0	-66.7	-66.7	-10.0	-37.5	0.0	-66.7	-25.0
US 2Y yield	0.16	0.0	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.

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