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미국 증시는 연준(FRB)의 팬데믹 이후 첫 금리인상이 예상보다 빨리 이뤄질 것이라는 소식이 전해지면서 하락 마감했습니다. 새로운 전망에 따르면, 중앙은행 관계자 18명 중 11명이 2023년 적어도 2번의 0.25% 금리인상이 있을 것으로 예상하면서도 일자리 회복을 위해 당분간 현재의 정책을 지지하겠다고 약속했습니다. 연준은 올해 전체 경제성장률이 7%를 기록할 것으로 예상되는 등 경제전망이 개선됐다고 밝혔습니다.

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국제 유가는 미국 정부의 공식 데이터가 매주 7백만 배럴 이상의 원유 재고가 줄었음을 보였음에도 소폭 하락하며 4주 연속 하락세를 보였습니다.

MSCI	Latest	1 Day	MTD	YTD	Q1 21	Q4 20	Q3 20	May-21	Apr-21	Mar-21
World	718	-0.3	1.0	12.1	4.7	14.8	8.3	1.6	4.4	2.7
United States	4,100	-0.5	0.7	12.5	5.5	13.2	9.6	0.5	5.4	3.8
Europe	2,103	0.2	2.3	16.4	4.2	15.7	4.6	4.3	4.7	3.2
Japan	3,968	0.1	2.2	4.0	1.7	15.3	7.1	1.6	-1.5	1.2
Emerging Markets	1,370	-0.6	-0.3	7.0	2.3	19.8	9.7	2.3	2.5	-1.5
Asia Pac Ex Japan	700	-0.6	-0.5	6.7	2.8	19.2	9.6	1.5	2.8	-2.1
Asia Ex Japan	883	-0.7	-1.1	5.5	2.8	18.7	10.8	1.2	2.5	-2.5
Australia	1,006	0.6	2.8	15.2	3.4	22.9	2.8	3.2	4.9	0.7
Hong Kong	13,107	0.0	-2.2	9.5	7.3	15.5	1.6	1.3	3.1	0.4
China H	106	-1.4	-3.3	-1.6	-0.4	11.2	12.6	0.8	1.4	-6.3
China A	2,570	-1.7	-4.4	1.5	-4.2	18.2	15.4	6.3	4.3	-6.3
Korea	716	0.6	1.6	7.0	1.8	38.6	12.9	0.4	3.0	0.3
Taiwan	710	-0.7	0.3	18.5	11.0	23.2	17.1	-1.2	7.7	-0.4
Thailand	414	0.1	1.9	4.8	4.4	25.5	-14.0	-0.5	-0.9	2.5
Malaysia	310	-0.4	-0.2	-4.6	-5.8	10.1	2.6	-1.9	3.4	-2.0
Singapore	3,855	-1.1	-0.8	11.4	8.9	18.9	-1.0	-0.1	3.2	5.1
Indonesia	714	-1.4	0.3	-6.1	-7.5	31.8	-6.8	1.3	-0.1	-6.2
India	770	-0.7	1.3	14.8	5.2	21.2	15.1	8.7	-0.9	2.3
Philippines	511	0.1	5.1	-0.7	-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	34,034	-0.8	-1.4	12.2	8.3	10.7	8.2	2.2	2.8	6.8
Nasdaq	14,040	-0.2	2.2	9.3	3.0	15.6	11.2	-1.4	5.4	0.5
S&P 500	4,224	-0.5	0.5	13.2	6.2	12.1	8.9	0.7	5.3	4.4
Euro Stoxx 600	460	0.2	3.0	17.3	8.3	10.9	0.7	2.7	2.3	6.5
FTSE100	7,185	0.2	2.4	13.1	5.0	10.9	-4.0	1.1	4.1	4.2
DAX	15,711	-0.1	1.9	14.5	9.4	7.5	3.7	1.9	0.8	8.9
CAC 40	6,653	0.2	3.3	22.0	9.6	15.8	-2.0	4.0	3.6	6.5
FTSE MIB	25,768	0.1	2.4	17.6	11.3	17.0	-1.4	5.2	-1.9	7.9
Ibex 35	9,202	-0.3	0.9	15.2	6.7	21.2	-6.6	3.9	3.0	4.4
Hang Seng	28,452	-0.7	-2.3	5.7	4.5	16.2	-2.6	2.1	1.3	-1.8
Nikkei	29,291	-0.5	1.5	7.4	7.0	18.5	4.7	0.2	-1.3	1.4
KOSPI	437	0.7	2.1	13.2	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	73.9	-0.5	6.6	42.6	21.7	26.5	-0.5	4.0	5.8	-2.2
WTI	71.6	-1.2	7.0	48.0	23.1	21.5	1.5	5.4	6.5	-3.3
US 10Y yield	1.57	4.0	-0.6	68.8	87.1	34.8	4.5	-4.2	-5.2	20.8
US 3M yield	0.04	33.3	300.0	-55.6	-66.7	-10.0	-37.5	0.0	-66.7	-25.0
US 2Y yield	0.21	31.3	50.0	61.5	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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