

아시아 증시는 금요일 혼조세를 나타냈습니다. 중국 증시는 소비재, 헬스케어 및 부동산주가 하락 하면서 하락세로 마감했습니다. 한국의 주가는 미국 증시의 실적 낙관론과 긍정적인 신호들이 시장을 뒷받침하면서 전일 상승세를 이어갔습니다. 호주의 주가는 헬스케어 및 기술주 상승이 금융 및 에너지 기업의 하락을 앞지르며 소폭 상승했습니다. 인도 증시는 IT주 상승과 Zomato의 화려한 상장이 텔레콤 섹터의 하락을 상쇄하며 상승 마감했습니다.

유럽 증시는 실적시즌에 대한 낙관론과 ECB의 지속적인 지원 공약이 감염의 부활 리스크를 넘어 서며 금요일 큰 폭으로 상승했습니다. Daimler가 등급 상승 후 5% 이상 오르며 자동차주는 2% 이상 상승했습니다. 유로존의 비즈니스 활동은 지난 7월 20년 만에 가장 빠른 월별 성장세를 보였지만, 또 다른 감염 파동에 대한 우려가 기업 신뢰지수에 타격을 주었습니다. 독일의 PMI는 거의 25년 만에 최고치를 기록하면서 인플레이션 병목 현상을 야기했습니다.

미국 증시는 기업 실적 호황과 경기 회복의 조짐이 위험자산 선호를 부채질하면서 금요일 4일 연속 랠리를 이어가며 3개 지수 모두 사상최고치로 마감했습니다. S&P 500의 120개 기업이 실적 발표를 마친 가운데, 2분기 어닝 시즌은 호황을 보이고 있습니다. Refinitiv에 따르면, 기업 중 88%가 시장 예상치를 상회했습니다. 실적 호조에 힘입어 트위터와 스냅이 급상승하면서 실적 발표를 앞두고 있는 페이스북 주가 또한 상승했습니다.

미국채 금리는 다음 주 연준 (FRB) 의 정책 수립 회의를 앞두고 금요일 상승했습니다. 해당 회의는 경기 회복의 강도와 언제 중앙은행이 경제 지원을 중단하기 시작할지에 대한 단서를 제공할 것입니다.

국제유가는 올해 공급이 타이트하게 유지될 것이라는 예상으로 지난 월요일 급락 이후 금요일 상승하며 주간 단위로도 상승 마감했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q2 21	Q1 21	Q4 20	Jun-21	May-21	Apr-21
World	727	0.6	1.1	13.8	7.5	4.7	14.8	1.4	1.6	4.4
United States	4,298	1.1	2.8	18.1	8.9	5.5	13.2	2.8	0.5	5.4
Europe	2,044	0.9	1.0	13.4	7.7	4.2	15.7	-1.3	4.3	4.7
Japan	3,800	-0.4	-1.8	-0.3	-0.2	1.7	15.3	-0.3	1.6	-1.5
Emerging Markets	1,311	-1.1	-4.3	3.0	5.1	2.3	19.8	0.2	2.3	2.5
Asia Pac Ex Japan	672	-1.2	-3.9	2.8	4.1	2.8	19.2	-0.3	1.5	2.8
Asia Ex Japan	848	-1.3	-4.4	1.9	3.7	2.8	18.7	-0.1	1.2	2.5
Australia	954	-0.3	-1.1	9.4	6.9	3.4	22.9	-1.3	3.2	4.9
Hong Kong	13,086	-1.5	-0.5	9.4	2.5	7.3	15.5	-1.8	1.3	3.1
China H	100	-2.7	-8.2	-6.5	2.3	-0.4	11.2	0.1	0.8	1.4
China A	2,575	-1.4	-2.0	2.7	9.3	-4.2	18.2	-1.4	6.3	4.3
Korea	685	-0.1	-4.0	2.6	4.9	1.8	38.6	1.4	0.4	3.0
Taiwan	699	-0.4	-1.1	17.5	7.2	11.0	23.2	0.7	-1.2	7.7
Thailand	370	-0.7	-5.6	-6.2	-4.8	4.4	25.5	-3.4	-0.5	-0.9
Malaysia	291	-0.4	-2.2	-10.1	-2.5	-5.8	10.1	-3.9	-1.9	3.4
Singapore	3,789	-0.2	0.1	9.5	0.5	8.9	18.9	-2.6	-0.1	3.2
Indonesia	669	-1.6	0.2	-11.8	-4.8	-7.5	31.8	-6.0	1.3	-0.1
India	764	0.2	1.3	14.0	7.0	5.2	21.2	-0.7	8.7	-0.9
Philippines	454	-1.4	-8.5	-11.8	7.6	-10.4	22.3	2.1	5.6	-0.2
Local Indices	Latest	1 Day	MTD	YTD	Q2 21	Q1 21	Q4 20	Jun-21	May-21	Apr-21
DJIA	35,062	0.7	1.7	15.7	5.1	8.3	10.7	0.0	2.2	2.8
Nasdaq	14,837	1.0	2.3	15.5	9.7	3.0	15.6	5.5	-1.4	5.4
S&P 500	4,412	1.0	2.7	18.4	8.5	6.2	12.1	2.3	0.7	5.3
Euro Stoxx 600	462	1.1	2.0	17.9	6.7	8.3	10.9	1.5	2.7	2.3
FTSE100	7,028	0.9	0.0	10.9	5.7	5.0	10.9	0.4	1.1	4.1
DAX	15,669	1.0	0.9	14.2	3.5	9.4	7.5	0.7	1.9	0.8
CAC 40	6,569	1.3	1.0	20.7	9.1	9.6	15.8	1.2	4.0	3.6
FTSE MIB	25,125	1.3	0.5	15.3	3.2	11.3	17.0	0.0	5.2	-1.9
Ibex 35	8,717	1.1	-0.6	10.0	3.8	6.7	21.2	-3.0	3.9	3.0
Hang Seng	27,285	-1.4	-4.8	2.2	2.7	4.5	16.2	-0.6	2.1	1.3
Nikkei	27,548	Hol.	-4.3	1.2	-1.2	7.0	18.5	-0.1	0.2	-1.3
KOSPI	432	0.1	-1.6	12.0	5.9	7.5	27.1	2.7	1.3	1.8
Bonds and Commodities	Latest	1 Day	MTD	YTD	Q2 21	Q1 21	Q4 20	Jun-21	May-21	Apr-21
Brent	74.2	0.7	-0.6	43.2	18.5	21.7	26.5	7.7	4.0	5.8
WTI	72.2	0.6	-1.9	49.0	23.5	23.1	21.5	10.0	5.4	6.5
US 10Y yield	1.30	2.4	-10.3	39.8	-16.7	87.1	34.8	-8.2	-4.2	-5.2
US 3M yield	0.05	0.0	0.0	-44.4	66.7	-66.7	-10.0	400.0	0.0	-66.7
US 2Y yield	0.22	10.0	-12.0	69.2	56.3	23.1	0.0	78.6	-12.5	0.0

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.

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 | T: +65 6349 9100