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유럽증시는 주요 원자재 기업, 에어버스 및 기타 기업들의 견조한 실적 발표 이후 사상 최고치를 경신했으며, 7월에 기록적으로 높은 유로존 경제 심리를 보여주는 데이터가 긍정적인 분위기를 더했습니다. Royal Dutch Shell 및 TotalEnergies는 유가 및 가스 가격 급등으로 이익이 증가하면서 양사가 자사주 매입을 발표한 후 각각 3%, 2% 이상 상승했습니다. 폭스바겐이 3개월 만에 두 번째로 수익률 목표를 끌어올리면서 사상 최고치를 경신했습니다.

미국 증시는 실적 호조와 전망에 힘입어 상승세로 마감했으며, 데이터는 2분기 경제가 팬데믹 이전 수준으로 회복했음을 보여주었습니다. 미국 경제는 2분기에 견실하게 성장했지만, GDP 성장 속도는 경제학자들의 예상을 하회했습니다. 최근의 실적 호황 가운데 포드자동차가 올해 이익 전망치를 상향 조정 하면서 3% 이상 뛰어올랐고, KFC 모기업 Yum Brands는 분기별 판매 예상치를 웃돌며 6% 이상 상승했습니다.

미 국채 금리는 상승했지만 예상보다 약한 경제 지표에도 불구하고 하루 종일 지속된 위험자산 선호에 7년 만기 국채 발행이 약세를 보이며 1일 최고치에서는 하락했습니다.

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MSCI	Latest	1 Day	MTD	YTD	Q2 21	Q1 21	Q4 20	Jun-21	May-21	Apr-21
World	730	0.8	1.5	14.2	7.5	4.7	14.8	1.4	1.6	4.4
United States	4,304	0.4	3.0	18.3	8.9	5.5	13.2	2.8	0.5	5.4
Europe	2,077	1.3	2.6	15.2	7.7	4.2	15.7	-1.3	4.3	4.7
Japan	3,877	0.9	0.2	1.7	-0.2	1.7	15.3	-0.3	1.6	-1.5
Emerging Markets	1,295	2.2	-5.4	1.8	5.1	2.3	19.8	0.2	2.3	2.5
Asia Pac Ex Japan	660	2.1	-5.5	1.0	4.1	2.8	19.2	-0.3	1.5	2.8
Asia Ex Japan	830	2.2	-6.4	-0.3	3.7	2.8	18.7	-0.1	1.2	2.5
Australia	961	1.3	-0.3	10.3	6.9	3.4	22.9	-1.3	3.2	4.9
Hong Kong	12,761	1.9	-3.0	6.7	2.5	7.3	15.5	-1.8	1.3	3.1
China H	96	4.0	-12.4	-10.7	2.3	-0.4	11.2	0.1	0.8	1.4
China A	2,478	2.7	-5.6	-1.2	9.3	-4.2	18.2	-1.4	6.3	4.3
Korea	684	0.7	-4.1	2.5	4.9	1.8	38.6	1.4	0.4	3.0
Taiwan	695	1.5	-1.4	17.3	7.2	11.0	23.2	0.7	-1.2	7.7
Thailand	369	0.4	-5.9	-6.5	-4.8	4.4	25.5	-3.4	-0.5	-0.9
Malaysia	288	-0.3	-3.4	-11.2	-2.5	-5.8	10.1	-3.9	-1.9	3.4
Singapore	3,853	2.0	1.8	11.4	0.5	8.9	18.9	-2.6	-0.1	3.2
Indonesia	662	0.3	-0.9	-12.7	-4.8	-7.5	31.8	-6.0	1.3	-0.1
India	763	0.5	1.2	13.9	7.0	5.2	21.2	-0.7	8.7	-0.9
Philippines	451	0.4	-9.0	-12.2	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	35,085	0.4	1.8	15.8	5.1	8.3	10.7	0.0	2.2	2.8
Nasdaq	14,778	0.1	1.9	15.1	9.7	3.0	15.6	5.5	-1.4	5.4
S&P 500	4,419	0.4	2.9	18.6	8.5	6.2	12.1	2.3	0.7	5.3
Euro Stoxx 600	464	0.5	2.5	18.5	6.7	8.3	10.9	1.5	2.7	2.3
FTSE100	7,078	0.9	0.7	11.7	5.7	5.0	10.9	0.4	1.1	4.1
DAX	15,640	0.5	0.7	14.0	3.5	9.4	7.5	0.7	1.9	0.8
CAC 40	6,634	0.4	2.0	21.9	9.1	9.6	15.8	1.2	4.0	3.6
FTSE MIB	25,516	1.0	2.0	17.1	3.2	11.3	17.0	0.0	5.2	-1.9
Ibex 35	8,786	0.6	0.1	10.9	3.8	6.7	21.2	-3.0	3.9	3.0
Hang Seng	26,244	3.3	-8.3	-1.5	2.7	4.5	16.2	-0.6	2.1	1.3
Nikkei	27,782	0.7	-3.5	2.1	-1.2	7.0	18.5	-0.1	0.2	-1.3
KOSPI	429	0.1	-2.1	11.5	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	74.9	1.4	0.3	44.6	18.5	21.7	26.5	7.7	4.0	5.8
WTI	73.4	1.3	-0.3	51.6	23.5	23.1	21.5	10.0	5.4	6.5
US 10Y yield	1.28	1.6	-11.7	37.6	-16.7	87.1	34.8	-8.2	-4.2	-5.2
US 3M yield	0.06	20.0	20.0	-33.3	66.7	-66.7	-10.0	400.0	0.0	-66.7
US 2Y yield	0.20	0.0	-20.0	53.8	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.

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