

아시아 증시는 금요일 하락세로 돌아섰습니다. 중국 및 홍콩 증시는 억압적 규제에 대한 지속적인 우려가 정부의 시장 진정 시도보다 더 커지면서 폭락했습니다. 한국의 주가는 중국 정부의 억압 및 팬데믹에 대한 우려로 하락했습니다. 일본 닛케이 지수는 급증하는 감염, 일부 실적에 대한 실망, 미 증시 선물의 하락으로 투자 심리가 위축되면서 하락했습니다. 인도 증시는 금속 및 금융주 주도로 전반적인 아시아 시장을 추종하며 하락했습니다.

유럽 증시는 델타 변이에 대한 우려와 중국 내 규제 조치가 어닝 시즌과 경기 회복에 대한 낙관론을 넘어서며 금요일 하락했습니다. 여행, 레저 및 광업주들이 가장 큰 폭으로 하락했습니다. British Airways 모 그룹 IAG는 여름 수용 역량이 팬데믹 이전 수준의 45% 까지 증가할 것이라고 했으나 여전히 불확실성을 경고하며 7% 이상 하락했습니다. 한편, 사전 자료에 따르면 유로존 경제는 2분기에 예상보다 더 견조하게 성장했습니다.

미국 증시는 아마존이 낮은 판매 성장을 전망한 후 약세를 보이며 금요일 하락 했지만, S&P 500 지수는 6개월 연속 상승세를 이어갔습니다. 연간 인플레이션이 연준(Fed)의 목표치인 2%를 넘어 가속화되었지만, 6월 소비자 지출은 예상을 상회했습니다. 한편, Pinterest의 주가는 팬데믹의 정점에서 공예품과 DIY 프로젝트에 플랫폼을 사용한 사람들이 탈퇴하며 미국 내 사용자 증가세가 둔화되고 있다고 언급한 후 급락했습니다.

미 국채 금리는 예상을 하회한 인플레이션 데이터가 연준이 양적완화를 끝내는 시점을 지연시킬 수 있다는 견해를 제공했고, 투자자들이 급증하는 코로나 델타 변이를 우려하며 하락했습니다.

국제유가는 글로벌 벤치마크 브렌트유가 네 번째 월간 상승을 기록하면서, 수요가 공급보다 빠르게 증가하고 백신 접종이 전 세계 COVID-19 감염의 재발을 완화시킬 것으로 예상되며 금요일 소폭 상승했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q2 21	Q1 21	Q4 20	Jun-21	May-21	Apr-21
World	724	-0.7	0.7	13.4	7.5	4.7	14.8	1.4	1.6	4.4
United States	4,279	-0.6	2.4	17.6	8.9	5.5	13.2	2.8	0.5	5.4
Europe	2,062	-0.7	1.9	14.4	7.7	4.2	15.7	-1.3	4.3	4.7
Japan	3,819	-1.5	-1.3	0.2	-0.2	1.7	15.3	-0.3	1.6	-1.5
Emerging Markets	1,278	-1.4	-6.7	0.4	5.1	2.3	19.8	0.2	2.3	2.5
Asia Pac Ex Japan	653	-1.1	-6.6	-0.1	4.1	2.8	19.2	-0.3	1.5	2.8
Asia Ex Japan	821	-1.1	-7.4	-1.4	3.7	2.8	18.7	-0.1	1.2	2.5
Australia	951	-1.0	-1.3	9.1	6.9	3.4	22.9	-1.3	3.2	4.9
Hong Kong	12,772	0.1	-2.9	6.8	2.5	7.3	15.5	-1.8	1.3	3.1
China H	94	-1.6	-13.8	-12.2	2.3	-0.4	11.2	0.1	0.8	1.4
China A	2,453	-1.0	-6.5	-2.1	9.3	-4.2	18.2	-1.4	6.3	4.3
Korea	672	-1.7	-5.6	0.8	4.9	1.8	38.6	1.4	0.4	3.0
Taiwan	690	-0.7	-2.0	16.5	7.2	11.0	23.2	0.7	-1.2	7.7
Thailand	365	-1.0	-6.9	-7.5	-4.8	4.4	25.5	-3.4	-0.5	-0.9
Malaysia	286	-0.7	-4.0	-11.8	-2.5	-5.8	10.1	-3.9	-1.9	3.4
Singapore	3,836	-0.4	1.3	10.9	0.5	8.9	18.9	-2.6	-0.1	3.2
Indonesia	655	-1.1	-1.9	-13.7	-4.8	-7.5	31.8	-6.0	1.3	-0.1
India	761	-0.3	0.9	13.6	7.0	5.2	21.2	-0.7	8.7	-0.9
Philippines	438	-3.0	-11.7	-14.8	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	34,935	-0.4	1.3	15.3	5.1	8.3	10.7	0.0	2.2	2.8
Nasdaq	14,673	-0.7	1.2	14.3	9.7	3.0	15.6	5.5	-1.4	5.4
S&P 500	4,395	-0.5	2.4	18.0	8.5	6.2	12.1	2.3	0.7	5.3
Euro Stoxx 600	462	-0.4	2.1	18.0	6.7	8.3	10.9	1.5	2.7	2.3
FTSE100	7,032	-0.7	0.1	11.0	5.7	5.0	10.9	0.4	1.1	4.1
DAX	15,544	-0.6	0.1	13.3	3.5	9.4	7.5	0.7	1.9	0.8
CAC 40	6,613	-0.3	1.6	21.5	9.1	9.6	15.8	1.2	4.0	3.6
FTSE MIB	25,363	-0.6	1.4	16.4	3.2	11.3	17.0	0.0	5.2	-1.9
Ibex 35	8,676	-1.3	-1.1	9.5	3.8	6.7	21.2	-3.0	3.9	3.0
Hang Seng	25,908	-1.3	-9.6	-2.9	2.7	4.5	16.2	-0.6	2.1	1.3
Nikkei	27,284	-1.8	-5.2	0.2	-1.2	7.0	18.5	-0.1	0.2	-1.3
KOSPI	424	-1.3	-3.3	10.0	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	76.3	0.4	2.2	47.4	18.5	21.7	26.5	7.7	4.0	5.8
WTI	73.8	0.6	0.3	52.4	23.5	23.1	21.5	10.0	5.4	6.5
US 10Y yield	1.24	-3.1	-14.5	33.3	-16.7	87.1	34.8	-8.2	-4.2	-5.2
US 3M yield	0.06	0.0	20.0	-33.3	66.7	-66.7	-10.0	400.0	0.0	-66.7
US 2Y yield	0.19	-5.0	-24.0	46.2	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.

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