

아시아 증시는 소폭 상승했습니다. 중국 증시는 기술주가 반등하면서 상승세를 보였고, 민간 소비에서는 서비스업 성장이 더 빨라진 것으로 나타났지만, 감염 급증에 대한 우려로 상승세는 제한되었습니다. 한국의 주가는 대형 반도체주주의 외국인 매수세로 급등세를 보였습니다. 호주 시장은 철광석 가격이 상승하며 광업주 주도로 상승했습니다. 그러나 일본 증시는 델타 변이에 대한 우려가 투자자들을 긴장시키고 있는 가운데 하락했고, 도요타 주가는 실적 호조세 이후 수익 실현으로 하락했습니다.

유럽 증시는 기술주가 20년 내 최고치를 보이며 새로운 최고치를 경신했고, 실적 시즌에 대한 낙관론이 긍정적인 분위기에 계속 반영되고 있습니다. 네덜란드의 화학 회사인 IMCD와 위성 제조업체 SES는 각각 10%, 9% 이상 상승하며 STOXX 600에서 상위를 차지했습니다. 유로존의 비즈니스 활동은 7월에 앞서서 15년 만에 가장 빠른 속도로 확장되었지만, 공급망 붕괴와 노동력 부족은 투입물가가 20년 만에 가장 빠른 속도로 오르도록 만들었습니다.

미국 증시는 혼조세를 보였습니다. 지난달 고용 증가세가 둔화되고 있다는 데이터로 S&P 500지수는 하락했고, 제너럴 모터스는 기록적인 세전 이익에도 불구하고 1년여 만에 최악의 날을 기록했습니다. GM의 주가는 거의 9% 하락하여 기술 및 경제적 혼란 상황에서 글로벌 자동차 기업들이 직면하는 불확실성을 강조했고 경쟁사인 포드 자동차의 주가는 거의 5% 하락했습니다. 한편, 지난달 서비스 산업 활동 지표가 사상 최고 수준으로 급등한 것으로 나타났습니다.

미국채 금리는 실망스러운 민간 부문 일자리 보고서와 서비스 부문에 대한 강력한 데이터, 그리고 예정된 회의에서 채권 매입을 늦출 것인지에 대한 한 연준 관계자의 논평으로 혼조세를 보였습니다.

국제유가는 미국의 원유 비축량, 부정적인 미국 경제 보고서, 그리고 델타 변이의 확산이 전세계 에너지 수요를 짓누를 것이라는 우려로 큰 폭으로 하락했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q2 21	Q1 21	Q4 20	Jul-21	Jun-21	May-21
World	729	-0.1	0.7	14.2	7.5	4.7	14.8	0.7	1.4	1.6
United States	4,289	-0.4	0.2	17.9	8.9	5.5	13.2	2.4	2.8	0.5
Europe	2,089	0.5	1.3	15.8	7.7	4.2	15.7	1.9	-1.3	4.3
Japan	3,870	-1.0	1.3	1.5	-0.2	1.7	15.3	-1.3	-0.3	1.6
Emerging Markets	1,304	0.8	2.1	2.5	5.1	2.3	19.8	-6.7	0.2	2.3
Asia Pac Ex Japan	668	0.9	2.3	2.2	4.1	2.8	19.2	-6.6	-0.3	1.5
Asia Ex Japan	839	0.9	2.3	0.9	3.7	2.8	18.7	-7.4	-0.1	1.2
Australia	970	0.5	2.0	11.3	6.9	3.4	22.9	-1.3	-1.3	3.2
Hong Kong	12,823	-0.3	0.4	7.3	2.5	7.3	15.5	-2.9	-1.8	1.3
China H	96	1.0	1.6	-10.8	2.3	-0.4	11.2	-13.8	0.1	0.8
China A	2,537	1.2	3.4	1.2	9.3	-4.2	18.2	-6.5	-1.4	6.3
Korea	698	1.8	3.7	4.5	4.9	1.8	38.6	-5.6	1.4	0.4
Taiwan	712	1.0	3.2	20.2	7.2	11.0	23.2	-2.0	0.7	-1.2
Thailand	368	0.0	0.7	-6.8	-4.8	4.4	25.5	-6.9	-3.4	-0.5
Malaysia	285	-0.7	-0.4	-12.2	-2.5	-5.8	10.1	-4.0	-3.9	-1.9
Singapore	3,877	1.6	1.2	12.3	0.5	8.9	18.9	1.3	-2.6	-0.1
Indonesia	680	0.8	3.9	-10.3	-4.8	-7.5	31.8	-1.9	-6.0	1.3
India	785	0.4	3.1	17.1	7.0	5.2	21.2	0.9	-0.7	8.7
Philippines	465	0.1	6.1	-9.7	7.6	-10.4	22.3	-11.7	2.1	5.6
Local Indices	Latest	1 Day	MTD	YTD	Q2 21	Q1 21	Q4 20	Jul-21	Jun-21	May-21
DJIA	34,793	-0.9	-0.4	14.8	5.1	8.3	10.7	1.3	0.0	2.2
Nasdaq	14,781	0.1	0.7	15.1	9.7	3.0	15.6	1.2	5.5	-1.4
S&P 500	4,403	-0.5	0.2	18.2	8.5	6.2	12.1	2.4	2.3	0.7
Euro Stoxx 600	468	0.6	1.4	19.7	6.7	8.3	10.9	2.1	1.5	2.7
FTSE100	7,124	0.3	1.3	12.4	5.7	5.0	10.9	0.1	0.4	1.1
DAX	15,692	0.9	1.0	14.4	3.5	9.4	7.5	0.1	0.7	1.9
CAC 40	6,746	0.3	2.0	23.9	9.1	9.6	15.8	1.6	1.2	4.0
FTSE MIB	25,490	0.5	0.5	17.0	3.2	11.3	17.0	1.4	0.0	5.2
Ibex 35	8,793	0.2	1.4	11.0	3.8	6.7	21.2	-1.1	-3.0	3.9
Hang Seng	26,427	0.9	1.8	-1.1	2.7	4.5	16.2	-9.6	-0.6	2.1
Nikkei	27,584	-0.2	1.1	1.3	-1.2	7.0	18.5	-5.2	-0.1	0.2
KOSPI	436	1.4	2.9	13.2	5.9	7.5	27.1	-3.3	2.7	1.3
Bonds and Commodities	Latest	1 Day	MTD	YTD	Q2 21	Q1 21	Q4 20	Jul-21	Jun-21	May-21
Brent	70.3	-2.8	-7.9	35.7	18.5	21.7	26.5	2.2	7.7	4.0
WTI	68.0	-3.5	-7.9	40.4	23.5	23.1	21.5	0.3	10.0	5.4
US 10Y yield	1.19	0.0	-4.0	28.0	-16.7	87.1	34.8	-14.5	-8.2	-4.2
US 3M yield	0.05	0.0	-16.7	-44.4	66.7	-66.7	-10.0	20.0	400.0	0.0
US 2Y yield	0.17	0.0	-10.5	30.8	56.3	23.1	0.0	-24.0	78.6	-12.5

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.

For more information contact: content@eastspring.com | T: +65 6349 9100

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