

아시아 증시는 혼조세로 마감했습니다. 중국 증시는 부채가 가장 많은 개발업체가 교차 채무 불이행 위험을 경고하며 부동산과 금융주 주도로 하락했습니다. 한국의 주가는 전일 미국 증시의 상승으로 인한 외국인의 매수세에 힘입어 상승했고, 투자자들은 8월 미국 인플레이션 지표에 주목하고 있습니다. 일본 닛케이 지수는 미국 증시 상승을 추적하며 경기 순환주를 중심으로 31년 만에 최고치를 기록했고, 국내 백신보급의 진전은 경제 재개에 대한 희망을 키웠습니다.

유럽 증시는 8월 미국 인플레이션을 진정시킬 수 있다는 낙관론이 단기적인 것으로 드러나며 광업, 은행, 명품주들이 하락을 주도하며 보험주로 마감했습니다. 기초 자원 섹터는 1.9%, 은행주는 1.1% 하락했습니다. LVMH, Kering, Richemont, 그리고 Burberry를 비롯한 명품주들은 중국에서의 증가하는 감염에 대한 우려로 1.9%~3% 하락했습니다. 한편 Pandora는 향후 몇 년간의 수익 목표를 높이고 자사주 매입 계획을 발표하며 6% 이상 상승했습니다.

미국 증시는 경기 불확실성과 법인세율 인상 가능성이 높아지면서 인플레이션 완화 조치에도 불구하고 투자 심리가 위축되고 광범위한 매도세 촉발로 하락세를 보였습니다. 3대 주요 지수 모두 9월이 역사적으로 주식에 힘든 달이라는 점을 상기시키며 하락 마감했습니다. 애플은 비즈니스 관행에 대해 조사를 받는 가운데 아이폰 13을 제품 출시 행사에서 공개했습니다. 애플의 주가는 약 1% 하락했습니다.

미국채 금리는 8월 소비자물가가 6개월 내 가장 낮은 속도로 상승했다는 자료가 발표되면서 하락했는데, 이는 인플레이션이 최고조에 달했을 가능성이 있고, 연준 (FRB)의 조치의 긴박함이 사라졌음을 시사합니다.

국제 유가는 열대성 폭풍 Nicolas가 텍사스에 폭우와 정전을 가져왔지만 이달 초 허리케인 Ida가 일으킨 피해보다 미국의 에너지 기반시설에 더 적은 피해를 입히면서 큰 변동이 없었습니다.

MSCI	Latest	1 Day	MTD	YTD	Q2 21	Q1 21	Q4 20	Aug-21	Jul-21	Jun-21
World	735	-0.3	-0.7	15.4	7.5	4.7	14.8	2.5	0.7	1.4
United States	4,322	-0.5	-1.7	19.0	8.9	5.5	13.2	3.0	2.4	2.8
Europe	2,078	0.1	-0.5	15.6	7.7	4.2	15.7	1.5	1.9	-1.3
Japan	4,258	1.2	8.2	11.7	-0.2	1.7	15.3	3.1	-1.3	-0.3
Emerging Markets	1,296	-0.4	-0.9	2.2	5.1	2.3	19.8	2.7	-6.7	0.2
Asia Pac Ex Japan	659	-0.5	-0.7	1.4	4.1	2.8	19.2	2.2	-6.6	-0.3
Asia Ex Japan	830	-0.5	-0.7	0.1	3.7	2.8	18.7	2.3	-7.4	-0.1
Australia	946	-0.4	-0.4	10.3	6.9	3.4	22.9	1.5	-1.3	-1.3
Hong Kong	12,545	-0.8	-0.4	5.7	2.5	7.3	15.5	-0.7	-2.9	-1.8
China A	2,549	-1.0	2.9	1.8	9.3	-4.2	18.2	1.1	-6.5	-1.4
Korea	643	1.0	-2.9	-3.6	4.9	1.8	38.6	-1.6	-5.6	1.4
Taiwan	718	0.0	0.2	22.1	7.2	11.0	23.2	4.6	-2.0	0.7
Thailand	389	-0.5	-3.9	-0.7	-4.8	4.4	25.5	11.6	-6.9	-3.4
Malaysia	300	-1.0	-2.6	-6.8	-2.5	-5.8	10.1	8.4	-4.0	-3.9
Singapore	3,782	0.7	1.0	10.7	0.5	8.9	18.9	-1.2	1.3	-2.6
Indonesia	708	0.4	0.4	-6.5	-4.8	-7.5	31.8	7.9	-1.9	-6.0
India	853	0.2	1.2	27.5	7.0	5.2	21.2	11.0	0.9	-0.7
Philippines	487	-0.6	0.3	-4.8	7.6	-10.4	22.3	11.5	-11.7	2.1
Local Indices	Latest	1 Day	MTD	YTD	Q2 21	Q1 21	Q4 20	Aug-21	Jul-21	Jun-21
DJIA	34,578	-0.8	-2.1	14.6	5.1	8.3	10.7	1.5	1.3	0.0
Nasdaq	15,038	-0.4	-1.4	17.2	9.7	3.0	15.6	4.1	1.2	5.5
S&P 500	4,443	-0.6	-1.7	19.5	8.5	6.2	12.1	3.0	2.4	2.3
Euro Stoxx 600	468	0.0	-0.6	19.8	6.7	8.3	10.9	2.2	2.1	1.5
FTSE100	7,034	-0.5	-1.0	12.1	5.7	5.0	10.9	2.1	0.1	0.4
DAX	15,723	0.1	-0.7	14.6	3.5	9.4	7.5	1.9	0.1	0.7
CAC 40	6,653	-0.4	-0.4	22.2	9.1	9.6	15.8	1.0	1.6	1.2
FTSE MIB	26,027	0.4	0.1	19.5	3.2	11.3	17.0	2.5	1.4	0.0
Ibex 35	8,780	-0.4	-0.8	10.9	3.8	6.7	21.2	2.0	-1.1	-3.0
Hang Seng	25,502	-1.2	-1.2	-4.1	2.7	4.5	16.2	-0.1	-9.6	-0.6
Nikkei	30,670	0.7	9.2	12.7	-1.2	7.0	18.5	3.0	-5.2	-0.1
KOSPI	412	0.6	-1.8	7.1	5.9	7.5	27.1	-0.9	-3.3	2.7
Bonds and Commodities	Latest	1 Day	MTD	YTD	Q2 21	Q1 21	Q4 20	Aug-21	Jul-21	Jun-21
Brent	73.9	0.4	3.2	42.7	18.5	21.7	26.5	-6.1	2.2	7.7
WTI	70.8	0.2	3.3	46.2	23.5	23.1	21.5	-7.2	0.3	10.0
US 10Y yield	1.28	-3.8	-1.5	37.6	-16.7	87.1	34.8	4.8	-14.5	-8.2
US 3M yield	0.04	-33.3	0.0	-55.6	66.7	-66.7	-10.0	-33.3	20.0	400.0
US 2Y yield	0.21	0.0	5.0	61.5	56.3	23.1	0.0	5.3	-24.0	78.6

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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