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유럽 증시는 스페인의 에너지 요금 상한제 조치로 인해 하락했고, 중국 경기 둔화에 대한 우려로 럭셔리주는 계속 약세를 보이고 있습니다. 명품 제조업체 LVMH와 Kering은 4% 이상 하락했습니다. 한편, 유틸리티 섹터는 거의 3% 하락했고, Enel은 5% 이상 하락했습니다. 스페인의 IBEX 지수는 유럽 지수 중 가장 큰 폭인 1.6% 하락했습니다. 영국 인플레이션이 8월에 9년 내 최고치를 기록했다는 자료가 나온 후 영국 주식들도 하방 압박을 받았습니다.

미국 증시는 유가 상승이 에너지 주를 상승시키고 인플레이션이 피크를 지난 것으로 추정되며 지속되는 경기 회복세가 투자심리를 끌어올리며 상승했습니다. 경기순환주, 소형주, 운송주가 상승을 주도했습니다. 수입물가는 2020년 10월 이후 처음으로 월별 하락세를 기록했는데, 이는 물가 상승이 최고조에 달했다는 최근의 신호입니다. 한편, GreenSky는 골드만 삭스가 22.4억 달러에 달하는 주식 전량 거래로 해당 기업을 인수하겠다고 발표한 이후 53% 이상 급등했습니다.

미국채 금리는 인플레이션이 최고조에 달했다는 추가 증거를 보여주는 경제 지표 이후 상승했고 10년 만기 금리는 3주 내 최고치를 기록했습니다.

국제 유가는 미국 원유 재고가 예상보다 많이 줄었다는 정부 자료 및 백신 보급이 늘어남에 따라 수요가 증가할 것이라는 기대감으로 큰 폭으로 상승했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q2 21	Q1 21	Q4 20	Aug-21	Jul-21	Jun-21
World	737	0.3	-0.5	15.7	7.5	4.7	14.8	2.5	0.7	1.4
United States	4,358	0.8	-0.9	20.0	8.9	5.5	13.2	3.0	2.4	2.8
Europe	2,061	-0.8	-1.2	14.7	7.7	4.2	15.7	1.5	1.9	-1.3
Japan	4,234	-0.6	7.6	11.1	-0.2	1.7	15.3	3.1	-1.3	-0.3
Emerging Markets	1,289	-0.6	-1.4	1.6	5.1	2.3	19.8	2.7	-6.7	0.2
Asia Pac Ex Japan	654	-0.8	-1.5	0.6	4.1	2.8	19.2	2.2	-6.6	-0.3
Asia Ex Japan	824	-0.8	-1.6	-0.7	3.7	2.8	18.7	2.3	-7.4	-0.1
Australia	942	-0.4	-0.8	9.9	6.9	3.4	22.9	1.5	-1.3	-1.3
Hong Kong	12,201	-2.7	-3.1	2.8	2.5	7.3	15.5	-0.7	-2.9	-1.8
China A	2,530	-0.7	2.1	1.1	9.3	-4.2	18.2	1.1	-6.5	-1.4
Korea	644	0.2	-2.7	-3.4	4.9	1.8	38.6	-1.6	-5.6	1.4
Taiwan	714	-0.5	-0.3	21.5	7.2	11.0	23.2	4.6	-2.0	0.7
Thailand	390	0.5	-3.4	-0.2	-4.8	4.4	25.5	11.6	-6.9	-3.4
Malaysia	300	0.0	-2.6	-6.9	-2.5	-5.8	10.1	8.4	-4.0	-3.9
Singapore	3,768	-0.4	0.6	10.3	0.5	8.9	18.9	-1.2	1.3	-2.6
Indonesia	704	-0.5	-0.2	-7.0	-4.8	-7.5	31.8	7.9	-1.9	-6.0
India	862	1.1	2.3	28.9	7.0	5.2	21.2	11.0	0.9	-0.7
Philippines	484	-0.8	-0.5	-5.6	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	34,814	0.7	-1.5	15.3	5.1	8.3	10.7	1.5	1.3	0.0
Nasdaq	15,162	0.8	-0.6	18.2	9.7	3.0	15.6	4.1	1.2	5.5
S&P 500	4,481	0.9	-0.9	20.5	8.5	6.2	12.1	3.0	2.4	2.3
Euro Stoxx 600	464	-0.8	-1.4	18.9	6.7	8.3	10.9	2.2	2.1	1.5
FTSE100	7,016	-0.2	-1.2	11.9	5.7	5.0	10.9	2.1	0.1	0.4
DAX	15,616	-0.7	-1.4	13.8	3.5	9.4	7.5	1.9	0.1	0.7
CAC 40	6,584	-1.0	-1.4	20.9	9.1	9.6	15.8	1.0	1.6	1.2
FTSE MIB	25,762	-1.0	-1.0	18.3	3.2	11.3	17.0	2.5	1.4	0.0
Ibex 35	8,635	-1.6	-2.4	9.0	3.8	6.7	21.2	2.0	-1.1	-3.0
Hang Seng	25,033	-1.8	-3.0	-5.8	2.7	4.5	16.2	-0.1	-9.6	-0.6
Nikkei	30,512	-0.5	8.6	12.2	-1.2	7.0	18.5	3.0	-5.2	-0.1
KOSPI	413	0.1	-1.6	7.2	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	75.5	2.1	5.4	45.8	18.5	21.7	26.5	-6.1	2.2	7.7
WTI	72.6	2.6	6.0	49.9	23.5	23.1	21.5	-7.2	0.3	10.0
US 10Y yield	1.31	2.3	0.8	40.9	-16.7	87.1	34.8	4.8	-14.5	-8.2
US 3M yield	0.04	0.0	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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