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아시아 증시는 대체로 하락세로 마감했습니다. 중국 증시는 중앙은행이 중기 대출의 이자 비용을 예기치 않게 인하함에 따라 인프라 및 부동산 주 주도로 상승했습니다. 한국의 주가는 이달 LG 에너지 솔루션의 108억 달러 IPO와 미국연준 정책 회의를 앞두고 투자자들이 자신의 포지션을 계속 조정하며 하락했습니다. 일본 시장은 미국국채 금리 급등으로 투자자들이 신중을 기하고 시장에서 큰 비중을 차지하는 주식을 매도하면서 하락했습니다.

유럽 증시는 미 국채 2년 물 금리가 3월로 예정된 정책 금리 인상에 대한 확대된 베팅을 반영하면서 기술주가 약 1.5% 하락하면서 약세를 보였습니다. 한편 유가급등으로 석유 및 가스 관련주는 상승했습니다. 독일 중고차 딜러 Auto1 Group은 4분기 실적 발표이후 약 4% 하락했습니다. 그러나프랑스의 비디오 게임 제작 기업 Ubisoft는 Microsoft가 Activision Blizzard를 687억 달러에 인수하기로 합의했다는 소식 이후 11% 이상 급등했습니다.

미국 증시는 골드만삭스의 실적이 금융주에 부담이 되면서 하락한 반면, 기술주는 미국 국채 금리가 기준점까지 상승하며 매도세를 이어갔습니다. 11개 주요 S&P 500 섹터 중 10개가 하락한 반면에너지 섹터는 홀로 상승했습니다. 골드만삭스는 약한 트레이딩 활동으로 분기별 이익 기대치를 하회하며 7% 하락 했습니다. 그러나 Activision 주가 는 Microsoft가해당 비디오 게임 기업을 687억달러에 인수하는 딜을 발표한 후거의 26% 급등 했습니다.

미 국채 금리는 트레이더들이 연준이 인플레이션에 더 적극적 으로 대처 할 것을 예상하면서 2년 만에 최고치 를 경신했고 2년 물 금리는 1%를 돌파했습니다.

국제 유가는 투자자들이 UAE 및 러시아와 같은 주요 산유국과 관련된 글로벌 정치적 긴장이 이미 타이트한 공급 전망을 악화 시킬 수 있다고 우려하며 2014년 이후 최고로 상승했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q4 21	Q3 21	Q2 21	Dec-21	Nov-21	Oct-21
World	733	-1.6	-2.8	-2.8	6.8	-1.0	7.5	4.0	-2.4	5.1
United States	4,387	-1.9	-4.4	-4.4	10.1	0.4	8.9	4.0	-1.0	7.0
Europe	2,065	-1.4	-1.3	-1.3	5.7	-1.5	7.7	6.6	-5.1	4.5
Japan	3,851	-0.3	0.0	0.0	-3.9	4.7	-0.2	1.9	-2.5	-3.4
Emerging Markets	1,242	-1.0	8.0	8.0	-1.2	-8.0	5.1	1.9	-4.1	1.0
Asia Pac Ex Japan	632	-0.8	0.4	0.4	-0.7	-8.3	4.1	1.9	-4.3	1.7
Asia Ex Japan	795	-0.8	0.7	0.7	-1.2	-9.2	3.7	1.4	-3.9	1.4
Australia	919	-0.5	-1.6	-1.6	2.1	-3.0	6.9	5.1	-6.5	3.9
Hong Kong	11,624	-0.3	2.3	2.3	-3.5	-9.4	2.5	0.5	-5.3	1.3
China H	84	-0.4	-0.1	-0.1	-6.1	-18.1	2.3	-3.2	-6.0	3.2
China A	2,510	8.0	-2.9	-2.9	3.2	-4.3	9.3	1.4	-0.3	2.0
Korea	588	-0.4	-3.2	-3.2	-0.7	-13.2	4.9	6.5	-4.6	-2.3
Taiwan	762	-1.4	2.6	2.6	8.5	-1.7	7.2	5.5	2.2	0.6
Thailand	385	-1.1	-0.1	-0.1	3.0	-3.5	-4.8	6.4	-6.0	3.0
Malaysia	293	Hol.	-1.5	-1.5	1.8	0.2	- 2.5	4.2	-4.7	2.5
Singapore	3,637	-0.6	1.2	1.2	-3.4	0.0	0.5	0.3	-7.5	4.2
Indonesia	790	-0.5	2.0	2.0	6.5	9.5	-4.8	1.1	-2.8	8.4
India	874	-1.8	3.4	3.4	-0.1	12.7	7.0	3.8	-3.0	-0.8
Philippines	507	1.2	2.7	2.7	3.7	-3.5	7.6	-2.2	2.6	3.3
Local Indices	Latest	1 Day	MTD	YTD	Q4 21	Q3 21	Q2 21	Dec-21	Nov-21	Oct-21
Local Indices DJIA	Latest 35,368	1 Day -1.5	MTD -2.6	YTD -2.6	Q4 21 7.9	Q3 21 -1.5	Q2 21 5.1	Dec-21 5.5	-3.5	Oct-21 5.9
Local Indices DJIA Nasdaq	Latest 35,368 14,507	1 Day -1.5 -2.6	-2.6 -7.3	-2.6 -7.3	Q4 21 7.9 8.4	Q3 21 -1.5 -0.2	Q2 21 5.1 9.7	5.5 0.7	-3.5 0.3	Oct-21 5.9 7.3
Local Indices DJIA Nasdaq S&P 500	Latest 35,368 14,507 4,577	1 Day -1.5 -2.6 -1.8	-2.6 -7.3 -3.9	-2.6 -7.3 -3.9	7.9 8.4 11.0	Q3 21 -1.5 -0.2 0.6	Q2 21 5.1 9.7 8.5	5.5 0.7 4.5	-3.5 0.3 -0.7	Oct-21 5.9 7.3 7.0
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600	Latest 35,368 14,507 4,577 480	1 Day -1.5 -2.6 -1.8 -1.0	-2.6 -7.3 -3.9 -1.6	-2.6 -7.3 -3.9 -1.6	Q4 21 7.9 8.4 11.0 7.6	Q3 21 -1.5 -0.2 0.6 0.9	9.7 8.5 6.7	5.5 0.7 4.5 5.4	Nov-21 -3.5 0.3 -0.7 -2.5	Oct-21 5.9 7.3 7.0 4.7
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100	35,368 14,507 4,577 480 7,564	1 Day -1.5 -2.6 -1.8 -1.0 -0.6	-2.6 -7.3 -3.9 -1.6 2.5	-2.6 -7.3 -3.9 -1.6 2.5	7.9 8.4 11.0 7.6 4.7	Q3 21 -1.5 -0.2 0.6 0.9 2.0	9.7 8.5 6.7 5.7	5.5 0.7 4.5 5.4 4.8	-3.5 0.3 -0.7 -2.5 -2.2	5.9 7.3 7.0 4.7 2.2
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX	35,368 14,507 4,577 480 7,564 15,773	1 Day -1.5 -2.6 -1.8 -1.0 -0.6 -1.0	-2.6 -7.3 -3.9 -1.6 2.5 -0.7	-2.6 -7.3 -3.9 -1.6 2.5 -0.7	7.9 8.4 11.0 7.6 4.7 4.1	-1.5 -0.2 0.6 0.9 2.0 -1.7	92 21 5.1 9.7 8.5 6.7 5.7 3.5	5.5 0.7 4.5 5.4 4.8 5.2	Nov-21 -3.5 0.3 -0.7 -2.5 -2.2 -3.8	0ct-21 5.9 7.3 7.0 4.7 2.2 2.8
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40	Latest 35,368 14,507 4,577 480 7,564 15,773 7,134	1 Day -1.5 -2.6 -1.8 -1.0 -0.6 -1.0 -0.9	MTD -2.6 -7.3 -3.9 -1.6 2.5 -0.7 -0.2	-2.6 -7.3 -3.9 -1.6 2.5 -0.7	7.9 8.4 11.0 7.6 4.7 4.1 9.9	Q3 21 -1.5 -0.2 0.6 0.9 2.0 -1.7 0.4	9.7 8.5 6.7 5.7 3.5 9.1	5.5 0.7 4.5 5.4 4.8 5.2 6.5	Nov-21 -3.5 0.3 -0.7 -2.5 -2.2 -3.8 -1.5	0ct-21 5.9 7.3 7.0 4.7 2.2 2.8 4.8
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB	Latest 35,368 14,507 4,577 480 7,564 15,773 7,134 27,483	1 Day -1.5 -2.6 -1.8 -1.0 -0.6 -1.0 -0.9 -0.7	-2.6 -7.3 -3.9 -1.6 2.5 -0.7 -0.2 0.5	-2.6 -7.3 -3.9 -1.6 2.5 -0.7 -0.2 0.5	Q4 21 7.9 8.4 11.0 7.6 4.7 4.1 9.9 7.7	Q3 21 -1.5 -0.2 0.6 0.9 2.0 -1.7 0.4 3.0	9.7 8.5 6.7 5.7 3.5 9.1 3.2	5.5 0.7 4.5 5.4 4.8 5.2 6.5 5.9	Nov-21 -3.5 0.3 -0.7 -2.5 -2.2 -3.8 -1.5 -3.4	7.3 7.0 4.7 2.2 2.8 4.8 5.3
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35	Latest 35,368 14,507 4,577 480 7,564 15,773 7,134 27,483 8,782	1 Day -1.5 -2.6 -1.8 -1.0 -0.6 -1.0 -0.9 -0.7 -0.6	MTD -2.6 -7.3 -3.9 -1.6 2.5 -0.7 -0.2 0.5 1.2	-2.6 -7.3 -3.9 -1.6 2.5 -0.7 -0.2 0.5 1.2	Q4 21 7.9 8.4 11.0 7.6 4.7 4.1 9.9 7.7 -0.3	Q3 21 -1.5 -0.2 0.6 0.9 2.0 -1.7 0.4 3.0 0.3	9.7 8.5 6.7 5.7 3.5 9.1 3.2 3.8	5.5 0.7 4.5 5.4 4.8 5.2 6.5 5.9 5.2	Nov-21 -3.5 0.3 -0.7 -2.5 -2.2 -3.8 -1.5 -3.4 -8.2	7.3 7.0 4.7 2.2 2.8 4.8 5.3 3.3
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	Latest 35,368 14,507 4,577 480 7,564 15,773 7,134 27,483 8,782 24,113	1 Day -1.5 -2.6 -1.8 -1.0 -0.6 -1.0 -0.9 -0.7 -0.6 -0.4	-2.6 -7.3 -3.9 -1.6 2.5 -0.7 -0.2 0.5 1.2 3.1	-2.6 -7.3 -3.9 -1.6 2.5 -0.7 -0.2 0.5 1.2 3.1	Q4 21 7.9 8.4 11.0 7.6 4.7 4.1 9.9 7.7 -0.3 -4.7	Q3 21 -1.5 -0.2 0.6 0.9 2.0 -1.7 0.4 3.0 0.3 -13.9	9.7 8.5 6.7 5.7 3.5 9.1 3.2 3.8 2.7	5.5 0.7 4.5 5.4 4.8 5.2 6.5 5.9 5.2 -0.3	Nov-21 -3.5 0.3 -0.7 -2.5 -2.2 -3.8 -1.5 -3.4 -8.2 -7.4	0ct-21 5.9 7.3 7.0 4.7 2.2 2.8 4.8 5.3 3.3 3.3
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35	Latest 35,368 14,507 4,577 480 7,564 15,773 7,134 27,483 8,782 24,113 28,257	1 Day -1.5 -2.6 -1.8 -1.0 -0.6 -1.0 -0.9 -0.7 -0.6 -0.4 -0.3	-2.6 -7.3 -3.9 -1.6 2.5 -0.7 -0.2 0.5 1.2 3.1 -1.9	-2.6 -7.3 -3.9 -1.6 2.5 -0.7 -0.2 0.5 1.2 3.1 -1.9	Q4 21 7.9 8.4 11.0 7.6 4.7 4.1 9.9 7.7 -0.3 -4.7 -2.1	Q3 21 -1.5 -0.2 0.6 0.9 2.0 -1.7 0.4 3.0 0.3 -13.9 3.0	Q2 21 5.1 9.7 8.5 6.7 5.7 3.5 9.1 3.2 3.8 2.7 -1.2	5.5 0.7 4.5 5.4 4.8 5.2 6.5 5.9 5.2 -0.3 3.6	Nov-21 -3.5 0.3 -0.7 -2.5 -2.2 -3.8 -1.5 -3.4 -8.2 -7.4 -3.7	0ct-21 5.9 7.3 7.0 4.7 2.2 2.8 4.8 5.3 3.3 3.3 -1.9
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI	Latest 35,368 14,507 4,577 480 7,564 15,773 7,134 27,483 8,782 24,113 28,257 381	1 Day -1.5 -2.6 -1.8 -1.0 -0.6 -1.0 -0.9 -0.7 -0.6 -0.4 -0.3 -0.7	-2.6 -7.3 -3.9 -1.6 2.5 -0.7 -0.2 0.5 1.2 3.1 -1.9	-2.6 -7.3 -3.9 -1.6 2.5 -0.7 -0.2 0.5 1.2 3.1 -1.9	7.9 8.4 11.0 7.6 4.7 4.1 9.9 7.7 -0.3 -4.7 -2.1 -0.7	Q3 21 -1.5 -0.2 0.6 0.9 2.0 -1.7 0.4 3.0 0.3 -13.9 3.0 -8.3	Q2 21 5.1 9.7 8.5 6.7 5.7 3.5 9.1 3.2 3.8 2.7 -1.2 5.9	5.5 0.7 4.5 5.4 4.8 5.2 6.5 5.9 5.2 -0.3 3.6 6.7	Nov-21 -3.5 0.3 -0.7 -2.5 -2.2 -3.8 -1.5 -3.4 -8.2 -7.4 -3.7 -3.9	0ct-21 5.9 7.3 7.0 4.7 2.2 2.8 4.8 5.3 3.3 3.3 -1.9 -3.2
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities	Latest 35,368 14,507 4,577 480 7,564 15,773 7,134 27,483 8,782 24,113 28,257 381 Latest	1 Day -1.5 -2.6 -1.8 -1.0 -0.6 -1.0 -0.9 -0.7 -0.6 -0.4 -0.3 -0.7	-2.6 -7.3 -3.9 -1.6 2.5 -0.7 -0.2 0.5 1.2 3.1 -1.9 -3.3	-2.6 -7.3 -3.9 -1.6 2.5 -0.7 -0.2 0.5 1.2 3.1 -1.9 -3.3	Q4 21 7.9 8.4 11.0 7.6 4.7 4.1 9.9 7.7 -0.3 -4.7 -2.1 -0.7	Q3 21 -1.5 -0.2 0.6 0.9 2.0 -1.7 0.4 3.0 0.3 -13.9 3.0 -8.3 Q3 21	Q2 21 5.1 9.7 8.5 6.7 5.7 3.5 9.1 3.2 3.8 2.7 -1.2 5.9 Q2 21	5.5 0.7 4.5 5.4 4.8 5.2 6.5 5.9 5.2 -0.3 3.6 6.7	Nov-21 -3.5 0.3 -0.7 -2.5 -2.2 -3.8 -1.5 -3.4 -8.2 -7.4 -3.7 -3.9 Nov-21	Oct-21 5.9 7.3 7.0 4.7 2.2 2.8 4.8 5.3 3.3 -1.9 -3.2 Oct-21
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities	Latest 35,368 14,507 4,577 480 7,564 15,773 7,134 27,483 8,782 24,113 28,257 381 Latest 88.4	1 Day -1.5 -2.6 -1.8 -1.0 -0.6 -1.0 -0.9 -0.7 -0.6 -0.4 -0.3 -0.7 1 Day 2.1	MTD -2.6 -7.3 -3.9 -1.6 2.5 -0.7 -0.2 0.5 1.2 3.1 -1.9 -3.3 MTD 13.6	-2.6 -7.3 -3.9 -1.6 2.5 -0.7 -0.2 0.5 1.2 3.1 -1.9 -3.3 YTD	Q4 21 7.9 8.4 11.0 7.6 4.7 4.1 9.9 7.7 -0.3 -4.7 -2.1 -0.7 Q4 21 -0.6	Q3 21 -1.5 -0.2 0.6 0.9 2.0 -1.7 0.4 3.0 0.3 -13.9 3.0 -8.3 Q3 21 4.9	Q2 21 5.1 9.7 8.5 6.7 5.7 3.5 9.1 3.2 3.8 2.7 -1.2 5.9 Q2 21 18.5	5.5 0.7 4.5 5.4 4.8 5.2 6.5 5.9 5.2 -0.3 3.6 6.7 Dec-21	Nov-21 -3.5 0.3 -0.7 -2.5 -2.2 -3.8 -1.5 -3.4 -8.2 -7.4 -3.7 -3.9 Nov-21 -16.8	Oct-21 5.9 7.3 7.0 4.7 2.2 2.8 4.8 5.3 3.3 -1.9 -3.2 Oct-21 7.7
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent WTI	Latest 35,368 14,507 4,577 480 7,564 15,773 7,134 27,483 8,782 24,113 28,257 381 s Latest 88.4 86.6	1 Day -1.5 -2.6 -1.8 -1.0 -0.6 -1.0 -0.9 -0.7 -0.6 -0.4 -0.3 -0.7 1 Day 2.1 2.7	MTD -2.6 -7.3 -3.9 -1.6 2.5 -0.7 -0.2 0.5 1.2 3.1 -1.9 -3.3 MTD 13.6 14.8	-2.6 -7.3 -3.9 -1.6 2.5 -0.7 -0.2 0.5 1.2 3.1 -1.9 -3.3 YTD 13.6 14.8	Q4 21 7.9 8.4 11.0 7.6 4.7 4.1 9.9 7.7 -0.3 -4.7 -2.1 -0.7 Q4 21 -0.6 0.6	Q3 21 -1.5 -0.2 0.6 0.9 2.0 -1.7 0.4 3.0 0.3 -13.9 3.0 -8.3 Q3 21 4.9 1.9	Q2 21 5.1 9.7 8.5 6.7 5.7 3.5 9.1 3.2 3.8 2.7 -1.2 5.9 Q2 21 18.5 23.5	5.5 0.7 4.5 5.4 4.8 5.2 6.5 5.9 5.2 -0.3 3.6 6.7 Dec-21	Nov-21 -3.5 0.3 -0.7 -2.5 -2.2 -3.8 -1.5 -3.4 -8.2 -7.4 -3.7 -3.9 Nov-21 -16.8 -19.8	0ct-21 5.9 7.3 7.0 4.7 2.2 2.8 4.8 5.3 3.3 -1.9 -3.2 Oct-21 7.7 11.4
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent WTI US 10Y yield	Latest 35,368 14,507 4,577 480 7,564 15,773 7,134 27,483 8,782 24,113 28,257 381 s Latest 88.4 86.6 1.87	1 Day -1.5 -2.6 -1.8 -1.0 -0.6 -1.0 -0.9 -0.7 -0.6 -0.4 -0.3 -0.7 1 Day 2.1 2.7 5.1	MTD -2.6 -7.3 -3.9 -1.6 2.5 -0.7 -0.2 0.5 1.2 3.1 -1.9 -3.3 MTD 13.6 14.8 23.0	-2.6 -7.3 -3.9 -1.6 2.5 -0.7 -0.2 0.5 1.2 3.1 -1.9 -3.3 YTD 13.6 14.8 23.0	Q4 21 7.9 8.4 11.0 7.6 4.7 4.1 9.9 7.7 -0.3 -4.7 -2.1 -0.7 Q4 21 -0.6 0.6 0.0	Q3 21 -1.5 -0.2 0.6 0.9 2.0 -1.7 0.4 3.0 0.3 -13.9 3.0 -8.3 Q3 21 4.9 1.9 4.8	Q2 21 5.1 9.7 8.5 6.7 5.7 3.5 9.1 3.2 3.8 2.7 -1.2 5.9 Q2 21 18.5 23.5 -16.7	5.5 0.7 4.5 5.4 4.8 5.2 6.5 5.9 5.2 -0.3 3.6 6.7 Dec-21 10.8 12.6 6.3	Nov-21 -3.5 0.3 -0.7 -2.5 -2.2 -3.8 -1.5 -3.4 -8.2 -7.4 -3.7 -3.9 Nov-21 -16.8 -19.8 -7.7	0ct-21 5.9 7.3 7.0 4.7 2.2 2.8 4.8 5.3 3.3 -1.9 -3.2 Oct-21 7.7 11.4 2.0
Local Indices DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent WTI	Latest 35,368 14,507 4,577 480 7,564 15,773 7,134 27,483 8,782 24,113 28,257 381 s Latest 88.4 86.6	1 Day -1.5 -2.6 -1.8 -1.0 -0.6 -1.0 -0.9 -0.7 -0.6 -0.4 -0.3 -0.7 1 Day 2.1 2.7	MTD -2.6 -7.3 -3.9 -1.6 2.5 -0.7 -0.2 0.5 1.2 3.1 -1.9 -3.3 MTD 13.6 14.8	-2.6 -7.3 -3.9 -1.6 2.5 -0.7 -0.2 0.5 1.2 3.1 -1.9 -3.3 YTD 13.6 14.8	Q4 21 7.9 8.4 11.0 7.6 4.7 4.1 9.9 7.7 -0.3 -4.7 -2.1 -0.7 Q4 21 -0.6 0.6	Q3 21 -1.5 -0.2 0.6 0.9 2.0 -1.7 0.4 3.0 0.3 -13.9 3.0 -8.3 Q3 21 4.9 1.9	Q2 21 5.1 9.7 8.5 6.7 5.7 3.5 9.1 3.2 3.8 2.7 -1.2 5.9 Q2 21 18.5 23.5	5.5 0.7 4.5 5.4 4.8 5.2 6.5 5.9 5.2 -0.3 3.6 6.7 Dec-21	Nov-21 -3.5 0.3 -0.7 -2.5 -2.2 -3.8 -1.5 -3.4 -8.2 -7.4 -3.7 -3.9 Nov-21 -16.8 -19.8	0ct-21 5.9 7.3 7.0 4.7 2.2 2.8 4.8 5.3 3.3 -1.9 -3.2 Oct-21 7.7 11.4

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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