STOCKS | BONDS | INTEREST RATES | COMMODITIES | CURRENCIES

아시아 증시는 금요일 하락 마감 했습니다. 중국 증시는 국제 금리인상에 따른 해외 자금 유출 우려, COVID-19 위기, 지정학적 긴장고조로 인해 하락했습니다. 한국의주가는 전기 자동차 배터리 제조기업을 중심으로 약세를 보이며 3개월 내 최대 주간 하락세를 기록했습니다. 일본 시장은 공휴일로휴장했습니다. 호주 증시는 미국연준(Fed)이 금리를 인상하고 긴축정책에 대한 매파적 입장을 유지하며 은행주 주도로 하락했습니다.

유럽 증시는 암울한 유로존 지표가 경기 침체 를 시사하고 투자자들이 영국의 새로운 경제 계획과그러한 결정을 소화하는 동안 매파적인 중앙 은행의 움직임에 대한 우려가 더해지며 금요일급락했습니다. 유럽 에너지 및재료주는 거의 6% 하락했으며 영국 재무장관 Kwasi Kwarteng은 성장촉진을 위한 일련의 감세 및조치를 발표했습니다. 각각 5%와 7% 하락한 TotalEnergies와 Shell은 STOXX 600 지수 하락을 주도했습니다.

미국 증시는 경제의 건전성과 인플레이션 억제를 위한 연준의 공격적인 금리 정책의 영향 관련 투자자들의 우려가 매도세를 촉발 하면서 급락했습니다. 11개 주요 S&P 500 섹터 모두가 7% 하락한 에너지주 주도로 하락했습니다. 대형 소매기업 Costco Wholesale Corp은 4분기 이익률 하락을 보고 한 후 4.5% 하락했습니다. 한편 Halliburton Co, Schlumberger, Helmerich and Payne Inc는 9% ~ 12% 대로 급락했습니다. 미 국채 금리는 전 세계 중앙은행들이 치솟는 인플레이션 대처를위해 긴축 통화정책을 지속할것이라는 투자자들의 우려로 10년 물 금리가 금요일 12년 내최고치로 급등하며 상승했습니다.

국제 유가는 금리 인상이 주요 경제를 침체에 빠뜨리고 원유 수요를 줄일 것이라는 우려로 5% 하락하며 8개월 내 최저치를 기록 했습니다. 한편, 미국 휘발유 및 경유 선물도 5% 이상 하락 했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q2 22	Q1 22	Q4 21	Aug-22	July-22	June-22
World	568	-2.0	-7.3	-23.5	-15.5	-5.3	6.8	-3.6	7.0	-8.4
United States	3,513	-1.7	-6.6	-22.6	-16.8	-5.2	10.1	-3.9	9.3	-8.3
Europe	1,501	-3.4	-9.0	-28.7	-14.2	-7.2	5.7	-6.2	5.0	-9.9
Japan	2,942	-0.8	-5.9	-22.5	-14.6	-6.4	-3.9	-2.5	5.7	-7.9
Emerging Markets	923	-1.8	-8.7	-24.4	-11.3	-6.9	-1.2	0.5	-0.2	-6.6
Asia Pac Ex Japan	470	-1.8	-9.3	-23.4	-10.5	-5.6	-0.7	-0.2	0.1	-5.7
Asia Ex Japan	580	-1.6	-9.4	-24.9	-8.9	-8.0	-1.2	0.0	-1.1	-4.4
Australia	756	-3.0	-8.9	-15.5	-18.1	7.3	2.1	-1.0	6.6	-12.0
Hong Kong	9,407	-0.8	-5.6	-14.8	-1.1	-1.8	-3.5	-3.5	-3.6	1.2
China H	58	-1.9	-12.2	-29.3	3.5	-14.2	-6.1	0.2	-9.4	6.6
China A	1,824	-1.4	-8.5	-28.1	1.8	-14.5	3.2	-3.7	-6.1	9.6
Korea	386	-1.1	-12.5	-35.8	-20.8	-9.5	-0.7	-3.3	5.8	-17.0
Taiwan	488	-1.6	-10.7	-31.5	-19.6	-6.5	8.5	-1.2	3.3	-14.0
Thailand	350	-1.3	-4.1	-7.3	-10.5	4.2	3.0	5.7	-1.9	-8.4
Malaysia	246	-1.2	-7.0	-14.9	-12.8	2.0	1.8	0.5	2.4	-8.2
Singapore	2,861	-1.8	-3.7	-18.0	-16.8	-1.7	-3.4	-1.8	6.0	-7.5
Indonesia	827	-1.0	0.9	9.7	-8.8	9.9	6.5	5.2	3.2	-9.2
India	772	-1.9	-4.5	-7.6	-13.5	-1.8	-0.1	4.2	9.4	-6.7
Philippines	381	-0.8	-9.3	-21.4	-19.4	2.4	3.7	2.7	2.2	-13.6
Local Indices	Latest	1 Day	MTD	YTD	Q2 22	Q1 22	Q4 21	Aug-22	July-22	June-22
DJIA	29,590	-1.6	-6.0	-17.3	-10.8	-4.1	7.9	-3.7	6.8	-6.6
DJIA Nasdaq	29,590 10,868	-1.6 -1.8	-6.0 -8.0	-17.3 -30.1	-10.8 -22.3	-4.1 -8.9	7.9 8.4	-3.7 -4.5	6.8 12.4	-6.6 -8.7
DJIA Nasdaq S&P 500	29,590 10,868 3,693	-1.6 -1.8 -1.7	-6.0 -8.0 -6.5	-17.3 -30.1 -21.6	-10.8 -22.3 -16.1	-4.1 -8.9 -4.6	7.9 8.4 11.0	-3.7 -4.5 -4.1	6.8 12.4 9.2	-6.6 -8.7 -8.3
DJIA Nasdaq S&P 500 Euro Stoxx 600	29,590 10,868 3,693 390	-1.6 -1.8 -1.7 -2.3	-6.0 -8.0 -6.5 -5.9	-17.3 -30.1 -21.6 -17.7	-10.8 -22.3 -16.1 -9.2	-4.1 -8.9 -4.6 -5.9	7.9 8.4 11.0 7.6	-3.7 -4.5 -4.1 -5.0	6.8 12.4 9.2 7.8	-6.6 -8.7 -8.3 -8.0
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100	29,590 10,868 3,693 390 7,019	-1.6 -1.8 -1.7 -2.3 -2.0	-6.0 -8.0 -6.5 -5.9 -3.5	-17.3 -30.1 -21.6 -17.7 -2.0	-10.8 -22.3 -16.1 -9.2 -3.7	-4.1 -8.9 -4.6 -5.9 2.9	7.9 8.4 11.0 7.6 4.7	-3.7 -4.5 -4.1 -5.0 -1.1	6.8 12.4 9.2 7.8 3.7	-6.6 -8.7 -8.3 -8.0 -5.5
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX	29,590 10,868 3,693 390 7,019 12,284	-1.6 -1.8 -1.7 -2.3 -2.0 -2.0	-6.0 -8.0 -6.5 -5.9 -3.5 -4.3	-17.3 -30.1 -21.6 -17.7 -2.0 -22.7	-10.8 -22.3 -16.1 -9.2 -3.7 -11.3	-4.1 -8.9 -4.6 -5.9 2.9 -9.3	7.9 8.4 11.0 7.6 4.7 4.1	-3.7 -4.5 -4.1 -5.0 -1.1 -4.8	6.8 12.4 9.2 7.8 3.7 5.5	-6.6 -8.7 -8.3 -8.0 -5.5 -11.2
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40	29,590 10,868 3,693 390 7,019 12,284 5,783	-1.6 -1.8 -1.7 -2.3 -2.0 -2.0 -2.3	-6.0 -8.0 -6.5 -5.9 -3.5 -4.3 -5.5	-17.3 -30.1 -21.6 -17.7 -2.0 -22.7 -16.8	-10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9	-4.1 -8.9 -4.6 -5.9 2.9 -9.3 -6.7	7.9 8.4 11.0 7.6 4.7 4.1 9.9	-3.7 -4.5 -4.1 -5.0 -1.1 -4.8 -5.0	6.8 12.4 9.2 7.8 3.7 5.5	-6.6 -8.7 -8.3 -8.0 -5.5 -11.2 -8.2
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB	29,590 10,868 3,693 390 7,019 12,284 5,783 21,067	-1.6 -1.8 -1.7 -2.3 -2.0 -2.0 -2.3 -3.4	-6.0 -8.0 -6.5 -5.9 -3.5 -4.3 -5.5	-17.3 -30.1 -21.6 -17.7 -2.0 -22.7 -16.8 -20.0	-10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5	-4.1 -8.9 -4.6 -5.9 2.9 -9.3 -6.7 -8.1	7.9 8.4 11.0 7.6 4.7 4.1 9.9 7.7	-3.7 -4.5 -4.1 -5.0 -1.1 -4.8 -5.0 -3.8	6.8 12.4 9.2 7.8 3.7 5.5 9.0 5.7	-6.6 -8.7 -8.3 -8.0 -5.5 -11.2 -8.2 -12.8
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35	29,590 10,868 3,693 390 7,019 12,284 5,783 21,067 7,584	-1.6 -1.8 -1.7 -2.3 -2.0 -2.0 -2.3 -3.4 -2.5	-6.0 -8.0 -6.5 -5.9 -3.5 -4.3 -5.5 -2.1	-17.3 -30.1 -21.6 -17.7 -2.0 -22.7 -16.8 -20.0 -10.6	-10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7	-4.1 -8.9 -4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6	7.9 8.4 11.0 7.6 4.7 4.1 9.9 7.7 -0.3	-3.7 -4.5 -4.1 -5.0 -1.1 -4.8 -5.0 -3.8 -3.3	6.8 12.4 9.2 7.8 3.7 5.5 9.0 5.7	-6.6 -8.7 -8.3 -8.0 -5.5 -11.2 -8.2 -12.8 -8.2
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	29,590 10,868 3,693 390 7,019 12,284 5,783 21,067 7,584 17,933	-1.6 -1.8 -1.7 -2.3 -2.0 -2.0 -2.3 -3.4 -2.5 -1.2	-6.0 -8.0 -6.5 -5.9 -3.5 -4.3 -5.5 -2.1 -3.8 -9.6	-17.3 -30.1 -21.6 -17.7 -2.0 -22.7 -16.8 -20.0 -10.6 -20.8	-10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9	-4.1 -8.9 -4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6 -5.7	7.9 8.4 11.0 7.6 4.7 4.1 9.9 7.7 -0.3 -4.7	-3.7 -4.5 -4.1 -5.0 -1.1 -4.8 -5.0 -3.8 -3.3 -0.8	6.8 12.4 9.2 7.8 3.7 5.5 9.0 5.7 1.5	-6.6 -8.7 -8.3 -8.0 -5.5 -11.2 -8.2 -12.8 -8.2 3.0
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	29,590 10,868 3,693 390 7,019 12,284 5,783 21,067 7,584 17,933 27,154	-1.6 -1.8 -1.7 -2.3 -2.0 -2.0 -2.3 -3.4 -2.5 -1.2 Hol.	-6.0 -8.0 -6.5 -5.9 -3.5 -4.3 -5.5 -2.1 -3.8 -9.6 -3.3	-17.3 -30.1 -21.6 -17.7 -2.0 -22.7 -16.8 -20.0 -10.6 -20.8 -4.6	-10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9 -4.9	-4.1 -8.9 -4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6 -5.7 -2.5	7.9 8.4 11.0 7.6 4.7 4.1 9.9 7.7 -0.3 -4.7 -2.1	-3.7 -4.5 -4.1 -5.0 -1.1 -4.8 -5.0 -3.8 -3.3 -0.8 1.1	6.8 12.4 9.2 7.8 3.7 5.5 9.0 5.7 1.5 -7.3	-6.6 -8.7 -8.3 -8.0 -5.5 -11.2 -8.2 -12.8 -8.2 3.0 -3.1
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI	29,590 10,868 3,693 390 7,019 12,284 5,783 21,067 7,584 17,933 27,154 298	-1.6 -1.8 -1.7 -2.3 -2.0 -2.0 -2.3 -3.4 -2.5 -1.2 Hol. -1.3	-6.0 -8.0 -6.5 -5.9 -3.5 -4.3 -5.5 -2.1 -3.8 -9.6 -3.3 -7.8	-17.3 -30.1 -21.6 -17.7 -2.0 -22.7 -16.8 -20.0 -10.6 -20.8 -4.6 -23.8	-10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9 -4.9 -15.7	-4.1 -8.9 -4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6 -5.7 -2.5 -6.8	7.9 8.4 11.0 7.6 4.7 4.1 9.9 7.7 -0.3 -4.7 -2.1	-3.7 -4.5 -4.1 -5.0 -1.1 -4.8 -5.0 -3.8 -3.3 -0.8 1.1 -0.1	6.8 12.4 9.2 7.8 3.7 5.5 9.0 5.7 1.5 -7.3 5.3	-6.6 -8.7 -8.3 -8.0 -5.5 -11.2 -8.2 -12.8 -8.2 3.0 -3.1 -13.1
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities	29,590 10,868 3,693 390 7,019 12,284 5,783 21,067 7,584 17,933 27,154 298	-1.6 -1.8 -1.7 -2.3 -2.0 -2.0 -2.3 -3.4 -2.5 -1.2 Hol. -1.3	-6.0 -8.0 -6.5 -5.9 -3.5 -4.3 -5.5 -2.1 -3.8 -9.6 -3.3 -7.8	-17.3 -30.1 -21.6 -17.7 -2.0 -22.7 -16.8 -20.0 -10.6 -20.8 -4.6 -23.8	-10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9 -4.9 -15.7	-4.1 -8.9 -4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6 -5.7 -2.5 -6.8	7.9 8.4 11.0 7.6 4.7 4.1 9.9 7.7 -0.3 -4.7 -2.1 -0.7	-3.7 -4.5 -4.1 -5.0 -1.1 -4.8 -5.0 -3.8 -3.3 -0.8 1.1 -0.1 Aug-22	6.8 12.4 9.2 7.8 3.7 5.5 9.0 5.7 1.5 -7.3 5.3 5.3	-6.6 -8.7 -8.3 -8.0 -5.5 -11.2 -8.2 -12.8 -8.2 3.0 -3.1 -13.1 June-22
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities	29,590 10,868 3,693 390 7,019 12,284 5,783 21,067 7,584 17,933 27,154 298 Latest 86.2	-1.6 -1.8 -1.7 -2.3 -2.0 -2.0 -2.3 -3.4 -2.5 -1.2 Hol. -1.3 1 Day -4.8	-6.0 -8.0 -6.5 -5.9 -3.5 -4.3 -5.5 -2.1 -3.8 -9.6 -3.3 -7.8 MTD -10.7	-17.3 -30.1 -21.6 -17.7 -2.0 -22.7 -16.8 -20.0 -10.6 -20.8 -4.6 -23.8 YTD 10.6	-10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9 -4.9 -15.7 Q2 22 5.7	-4.1 -8.9 -4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6 -5.7 -2.5 -6.8 Q1 22 34.2	7.9 8.4 11.0 7.6 4.7 4.1 9.9 7.7 -0.3 -4.7 -2.1 -0.7	-3.7 -4.5 -4.1 -5.0 -1.1 -4.8 -5.0 -3.8 -3.3 -0.8 1.1 -0.1 Aug-22 -7.2	6.8 12.4 9.2 7.8 3.7 5.5 9.0 5.7 1.5 -7.3 5.3 5.3 July-22	-6.6 -8.7 -8.3 -8.0 -5.5 -11.2 -8.2 -12.8 -8.2 3.0 -3.1 -13.1 June-22 -5.0
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	29,590 10,868 3,693 390 7,019 12,284 5,783 21,067 7,584 17,933 27,154 298 Latest 86.2 78.7	-1.6 -1.8 -1.7 -2.3 -2.0 -2.0 -2.3 -3.4 -2.5 -1.2 Hol. -1.3 1 Day -4.8 -5.9	-6.0 -8.0 -6.5 -5.9 -3.5 -4.3 -5.5 -2.1 -3.8 -9.6 -3.3 -7.8 MTD -10.7 -12.1	-17.3 -30.1 -21.6 -17.7 -2.0 -22.7 -16.8 -20.0 -10.6 -20.8 -4.6 -23.8 YTD 10.6 4.4	-10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9 -4.9 -15.7 Q2 22 5.7 6.3	-4.1 -8.9 -4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6 -5.7 -2.5 -6.8 Q1 22 34.2 34.0	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	-3.7 -4.5 -4.1 -5.0 -1.1 -4.8 -5.0 -3.8 -3.3 -0.8 1.1 -0.1 Aug-22 -7.2 -8.9	6.8 12.4 9.2 7.8 3.7 5.5 9.0 5.7 1.5 -7.3 5.3 5.3 July-22 -5.8 -8.6	-6.6 -8.7 -8.3 -8.0 -5.5 -11.2 -8.2 -12.8 -8.2 3.0 -3.1 -13.1 June-22 -5.0 -6.7
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	29,590 10,868 3,693 390 7,019 12,284 5,783 21,067 7,584 17,933 27,154 298 6 Latest 86.2 78.7 3.69	-1.6 -1.8 -1.7 -2.3 -2.0 -2.0 -2.3 -3.4 -2.5 -1.2 Hol. -1.3 1 Day -4.8 -5.9 -0.3	-6.0 -8.0 -6.5 -5.9 -3.5 -4.3 -5.5 -2.1 -3.8 -9.6 -3.3 -7.8 MTD -10.7 -12.1 17.1	-17.3 -30.1 -21.6 -17.7 -2.0 -22.7 -16.8 -20.0 -10.6 -20.8 -4.6 -23.8 YTD 10.6 4.4 142.8	-10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9 -4.9 -15.7 Q2 22 5.7 6.3 28.4	-4.1 -8.9 -4.6 -5.9 -9.3 -6.7 -8.1 -2.6 -5.7 -2.5 -6.8 Q1 22 34.2 34.0 52.6	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	-3.7 -4.5 -4.1 -5.0 -1.1 -4.8 -5.0 -3.8 -3.3 -0.8 1.1 -0.1 Aug-22 -7.2 -8.9 18.0	6.8 12.4 9.2 7.8 3.7 5.5 9.0 5.7 1.5 -7.3 5.3 5.3 July-22 -5.8 -8.6 -10.4	-6.6 -8.7 -8.3 -8.0 -5.5 -11.2 -8.2 -12.8 -8.2 3.0 -3.1 -13.1 June-22 -5.0 -6.7 4.6
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	29,590 10,868 3,693 390 7,019 12,284 5,783 21,067 7,584 17,933 27,154 298 Latest 86.2 78.7	-1.6 -1.8 -1.7 -2.3 -2.0 -2.0 -2.3 -3.4 -2.5 -1.2 Hol. -1.3 1 Day -4.8 -5.9	-6.0 -8.0 -6.5 -5.9 -3.5 -4.3 -5.5 -2.1 -3.8 -9.6 -3.3 -7.8 MTD -10.7 -12.1	-17.3 -30.1 -21.6 -17.7 -2.0 -22.7 -16.8 -20.0 -10.6 -20.8 -4.6 -23.8 YTD 10.6 4.4	-10.8 -22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9 -4.9 -15.7 Q2 22 5.7 6.3	-4.1 -8.9 -4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6 -5.7 -2.5 -6.8 Q1 22 34.2 34.0	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	-3.7 -4.5 -4.1 -5.0 -1.1 -4.8 -5.0 -3.8 -3.3 -0.8 1.1 -0.1 Aug-22 -7.2 -8.9	6.8 12.4 9.2 7.8 3.7 5.5 9.0 5.7 1.5 -7.3 5.3 5.3 July-22 -5.8 -8.6	-6.6 -8.7 -8.3 -8.0 -5.5 -11.2 -8.2 -12.8 -8.2 3.0 -3.1 -13.1 June-22 -5.0 -6.7

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



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