STOCKS | BONDS | INTEREST RATES | COMMODITIES | CURRENCIES

아시아 증시는 금요일 하락 마감 했습니다. 중국 증시는 최근 정부의 지원 조치에도 불구하고 국내부동산 섹터가 장기적인 침체에 직면해 있다는 우려와 수년간의 엄격한 코로나19 제한으로부터의 재개방이 험난하고 불확실할 것이라는 우려로 하락했습니다. 한국의 주가는 미국 주요 고용지표 발표를 앞두고 3주 연속 하락세를 보였습니다. 일본 시장은 기술주영향으로 하락했고, 엔화의 급격한 상승은 자동차 제조기업에 타격을 주었습니다.

유럽 증시는 에너지 및 기술주가지수 하락을 주도하면서 부동산 및 소매주의 상승을 상쇄하며이틀 간의 강한 상승 후 금요일하락했습니다. 프랑스 제약사 Sanofi 바이오텍 기업 Horizon Therapeutics 인수에 현금 입찰을 밝힌 뒤 약 2% 하락했습니다. 그러나 스위스 대출 기관 Credit Suisse는 12일 연속 하락, 주가가사상 최저치를 기록한 이후 9%이상 급등했습니다. 해당 은행은수의 전망이 악화됨에 따라 비용절감에 속도를 내고 있습니다.

미국 증시는 11월 급여 지표가 연준이 인플레이션 방지를 위해 금리 인상을 유지할 것이라는 예상을 불러일으키며 금요일 하락 마감했습니다. 노동부의 고용 보고서는 경기침체 우려가 커지는 상황에서도 비농업 고용이 증가 하고 임금 상습이 가속화되는 것 으로 나타냈습니다. 기술 섹터는 11개 주요 S&P 500 섹터 중 최악 의 성과를 보였습니다. 한편 Ford Motor는 11월 차량 판매 감소로 1% 이상 하락했으며 DoorDash는 3% 이상 하락했습니다. 미 국채 금리는 11월 견조한 미국 고용 보고서가 높은 인플레이션을 억제하기 위한 연준의 금리 인상 에 잠재적 장애인 임금 인상과 함께 회복력 있는 노동 시장을 보여주며 금요일 큰 폭의 상승세 를 보였습니다.

국제 유가는 세계 2위 경제 대국 중국의 수요 회복에 도움이 될 수 있는 중국의 코로나 제한 조치 완화가 추가될 것이라는 희망으로 상승했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q3 22	Q2 22	Q1 22	Nov-22	Oct-22	Sep-22
World	634	-0.3	0.4	-14.3	-6.7	-15.5	-5.3	7.8	6.1	- 9.5
United States	3,866	-0.1	-0.2	-14.6	-4.7	-16.8	-5.2	5.4	7.9	-9.3
Europe	1,774	-0.3	2.4	-12.5	-10.1	-14.2	-7.2	11.4	7.2	-8.7
Japan	3,181	-1.3	1.5	-15.3	-7.5	-14.6	-6.4	9.7	3.0	-10.2
Emerging Markets	974	-0.5	0.2	-18.5	-11.4	-11.3	-6.9	14.9	-3.1	-11.7
Asia Pac Ex Japan	513	-0.7	0.7	-16.2	-12.6	-10.5	-5.6	17.6	-4.2	-12.5
Asia Ex Japan	625	-0.5	0.6	-18.7	-13.7	-8.9	-8.0	18.8	-6.1	-12.7
Australia	872	-1.4	1.2	-2.1	-6.7	-18.1	7.3	12.2	5.3	-11.6
Hong Kong	9,781	-0.9	1.0	-11.0	-17.0	-1.1	-1.8	24.5	-12.2	-10.7
China H	61	0.2	0.9	-25.0	-22.4	3.5	-14.2	29.7	-16.8	-14.5
China A	1,862	-0.4	1.0	-26.5	-18.2	1.8	-14.5	13.0	-9.5	- 9.5
Korea	445	-2.2	-0.6	-25.7	-16.3	-20.8	- 9.5	14.9	8.3	-18.2
Taiwan	542	-0.4	1.6	-23.9	-14.0	-19.6	-6.5	22.2	- 5.1	-15.8
Thailand	386	-0.1	1.2	2.7	-2.8	-10.5	4.2	10.6	1.2	-6.2
Malaysia	268	-0.3	0.9	-6.6	-7.1	-12.8	2.0	8.8	2.9	- 9.8
Singapore	3,132	-0.8	0.5	-9.7	-1.5	-16.8	-1.7	11.5	0.0	-5.3
Indonesia	824	0.6	0.5	9.6	7.8	-8.8	9.9	0.6	0.4	-0.7
India	815	-0.6	-0.1	-2.2	6.8	-13.5	-1.8	5.2	2.6	-6.3
Philippines	413	-2.7	-3.3	-14.6	-13.5	-19.4	2.4	13.4	9.1	-17.6
Local Indices	Latest	1 Day	MTD	YTD	Q3 22	Q2 22	Q1 22	Nov-22	Oct-22	Sep-22
DJIA	34,430	0.1	-0.4	-3.3	-6.2	-10.8	-4.1	5.6	14.5	-8.8
Nasalaa										
Nasdaq	11,462	-0.2	0.0	-26.2	-3.9	-22.3	-8.9	4.5	3.9	-10.4
S&P 500	4,072	-0.1	0.0 -0.2	-26.2 -13.3	-3.9 -4.9	-22.3 -16.1	-4.6	5.6	8.1	-9.2
S&P 500 Euro Stoxx 600	4,072 443	-0.1 -0.2	0.0 -0.2 0.8	-26.2 -13.3 -6.3	-3.9 -4.9 -4.3	-22.3 -16.1 -9.2	-4.6 -5.9	5.6 6.9	8.1 6.4	-9.2 -6.5
S&P 500 Euro Stoxx 600 FTSE100	4,072 443 7,556	-0.1 -0.2 0.0	0.0 -0.2 0.8 -0.2	-26.2 -13.3 -6.3 6.1	-3.9 -4.9 -4.3 -2.7	-22.3 -16.1 -9.2 -3.7	-4.6 -5.9 2.9	5.6 6.9 7.1	8.1 6.4 3.0	-9.2 -6.5 -5.2
S&P 500 Euro Stoxx 600 FTSE100 DAX	4,072 443 7,556 14,529	-0.1 -0.2 0.0 0.3	0.0 -0.2 0.8 -0.2 0.9	-26.2 -13.3 -6.3 6.1 -8.5	-3.9 -4.9 -4.3 -2.7 -5.2	-22.3 -16.1 -9.2 -3.7 -11.3	-4.6 -5.9 2.9 -9.3	5.6 6.9 7.1 8.6	8.1 6.4 3.0 9.4	-9.2 -6.5 -5.2 -5.6
S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40	4,072 443 7,556 14,529 6,742	-0.1 -0.2 0.0 0.3 -0.2	0.0 -0.2 0.8 -0.2 0.9 0.1	-26.2 -13.3 -6.3 6.1 -8.5 -2.8	-3.9 -4.9 -4.3 -2.7 -5.2 -2.5	-22.3 -16.1 -9.2 -3.7 -11.3 -8.9	-4.6 -5.9 2.9 -9.3 -6.7	5.6 6.9 7.1 8.6 7.6	8.1 6.4 3.0 9.4 8.8	-9.2 -6.5 -5.2 -5.6 -5.8
S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB	4,072 443 7,556 14,529 6,742 24,622	-0.1 -0.2 0.0 0.3 -0.2 -0.3	0.0 -0.2 0.8 -0.2 0.9 0.1 0.0	-26.2 -13.3 -6.3 6.1 -8.5 -2.8 -5.8	-3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -2.4	-22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5	-4.6 -5.9 2.9 -9.3 -6.7 -8.1	5.6 6.9 7.1 8.6 7.6 9.4	8.1 6.4 3.0 9.4 8.8 9.7	-9.2 -6.5 -5.2 -5.6 -5.8 -4.1
S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35	4,072 443 7,556 14,529 6,742 24,622 8,383	-0.1 -0.2 0.0 0.3 -0.2 -0.3	0.0 -0.2 0.8 -0.2 0.9 0.1 0.0	-26.2 -13.3 -6.3 6.1 -8.5 -2.8 -5.8 -0.5	-3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -2.4 -8.3	-22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7	-4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6	5.6 6.9 7.1 8.6 7.6 9.4 5.3	8.1 6.4 3.0 9.4 8.8 9.7 8.5	-9.2 -6.5 -5.2 -5.6 -5.8 -4.1 -6.6
S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	4,072 443 7,556 14,529 6,742 24,622 8,383 18,675	-0.1 -0.2 0.0 0.3 -0.2 -0.3 -0.3	0.0 -0.2 0.8 -0.2 0.9 0.1 0.0 0.2	-26.2 -13.3 -6.3 6.1 -8.5 -2.8 -5.8 -0.5 -17.4	-3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -2.4 -8.3 -20.1	-22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9	-4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6 -5.7	5.6 6.9 7.1 8.6 7.6 9.4 5.3 26.8	8.1 6.4 3.0 9.4 8.8 9.7 8.5	-9.2 -6.5 -5.2 -5.6 -5.8 -4.1 -6.6 -13.1
S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	4,072 443 7,556 14,529 6,742 24,622 8,383 18,675 27,778	-0.1 -0.2 0.0 0.3 -0.2 -0.3 -0.3 -0.3	0.0 -0.2 0.8 -0.2 0.9 0.1 0.0 0.2 0.4 -0.7	-26.2 -13.3 -6.3 6.1 -8.5 -2.8 -5.8 -0.5 -17.4 -1.5	-3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -2.4 -8.3 -20.1 -0.8	-22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9 -4.9	-4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6 -5.7 -2.5	5.6 6.9 7.1 8.6 7.6 9.4 5.3 26.8 1.4	8.1 6.4 3.0 9.4 8.8 9.7 8.5 -14.7 6.4	-9.2 -6.5 -5.2 -5.6 -5.8 -4.1 -6.6 -13.1 -6.9
S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI	4,072 443 7,556 14,529 6,742 24,622 8,383 18,675 27,778 315	-0.1 -0.2 0.0 0.3 -0.2 -0.3 -0.3 -0.3 -1.6 -2.2	0.0 -0.2 0.8 -0.2 0.9 0.1 0.0 0.2 0.4 -0.7 -1.9	-26.2 -13.3 -6.3 6.1 -8.5 -2.8 -5.8 -0.5 -17.4 -1.5	-3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -2.4 -8.3 -20.1 -0.8 -8.1	-22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9 -4.9 -15.7	-4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6 -5.7 -2.5 -6.8	5.6 6.9 7.1 8.6 7.6 9.4 5.3 26.8 1.4 7.1	8.1 6.4 3.0 9.4 8.8 9.7 8.5 -14.7 6.4 6.5	-9.2 -6.5 -5.2 -5.6 -5.8 -4.1 -6.6 -13.1 -6.9 -12.7
S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities	4,072 443 7,556 14,529 6,742 24,622 8,383 18,675 27,778 315 Latest	-0.1 -0.2 0.0 0.3 -0.2 -0.3 -0.3 -0.3 -1.6 -2.2	0.0 -0.2 0.8 -0.2 0.9 0.1 0.0 0.2 0.4 -0.7 -1.9	-26.2 -13.3 -6.3 6.1 -8.5 -2.8 -5.8 -0.5 -17.4 -1.5 -19.1	-3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -2.4 -8.3 -20.1 -0.8 -8.1	-22.3 -16.1 -9.2 -3.7 -11.3 -8.9 -12.5 -2.7 0.9 -4.9 -15.7	-4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6 -5.7 -2.5 -6.8	5.6 6.9 7.1 8.6 7.6 9.4 5.3 26.8 1.4 7.1	8.1 6.4 3.0 9.4 8.8 9.7 8.5 -14.7 6.4 6.5	-9.2 -6.5 -5.2 -5.6 -5.8 -4.1 -6.6 -13.1 -6.9 -12.7 Sep-22
S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent	4,072 443 7,556 14,529 6,742 24,622 8,383 18,675 27,778 315 Latest 85.4	-0.1 -0.2 0.0 0.3 -0.2 -0.3 -0.3 -1.6 -2.2 1 Day -2.0	0.0 -0.2 0.8 -0.2 0.9 0.1 0.0 0.2 0.4 -0.7 -1.9	-26.2 -13.3 -6.3 6.1 -8.5 -2.8 -5.8 -0.5 -17.4 -1.5 -19.1 YTD 9.7	-3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -2.4 -8.3 -20.1 -0.8 -8.1 Q3 22 -20.3	-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	-4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6 -5.7 -2.5 -6.8 Q1 22 34.2	5.6 6.9 7.1 8.6 7.6 9.4 5.3 26.8 1.4 7.1 Nov-22	8.1 6.4 3.0 9.4 8.8 9.7 8.5 -14.7 6.4 6.5 Oct-22 7.0	-9.2 -6.5 -5.2 -5.6 -5.8 -4.1 -6.6 -13.1 -6.9 -12.7 Sep-22 -8.8
S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent WTI	4,072 443 7,556 14,529 6,742 24,622 8,383 18,675 27,778 315 Latest 85.4 80.3	-0.1 -0.2 0.0 0.3 -0.2 -0.3 -0.3 -1.6 -2.2 1 Day -1.3	0.0 -0.2 0.8 -0.2 0.9 0.1 0.0 0.2 0.4 -0.7 -1.9 MTD 0.0 -0.3	-26.2 -13.3 -6.3 6.1 -8.5 -2.8 -5.8 -0.5 -17.4 -1.5 -19.1 YTD 9.7 6.5	-3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -2.4 -8.3 -20.1 -0.8 -8.1 Q3 22 -20.3 -24.0	-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	-4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6 -5.7 -2.5 -6.8 Q1 22 34.2 34.0	5.6 6.9 7.1 8.6 7.6 9.4 5.3 26.8 1.4 7.1 Nov-22 -9.2 -6.5	8.1 6.4 3.0 9.4 8.8 9.7 8.5 -14.7 6.4 6.5 Oct-22 7.0 5.4	-9.2 -6.5 -5.2 -5.6 -5.8 -4.1 -6.6 -13.1 -6.9 -12.7 Sep-22 -8.8 -8.7
S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent	4,072 443 7,556 14,529 6,742 24,622 8,383 18,675 27,778 315 Latest 85.4 80.3 3.51	-0.1 -0.2 0.0 0.3 -0.2 -0.3 -0.3 -1.6 -2.2 1 Day -2.0 -1.3 -0.6	0.0 -0.2 0.8 -0.2 0.9 0.1 0.0 0.2 0.4 -0.7 -1.9 MTD 0.0 -0.3 -4.6	-26.2 -13.3 -6.3 6.1 -8.5 -2.8 -5.8 -0.5 -17.4 -1.5 -19.1 YTD 9.7 6.5 130.9	-3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -2.4 -8.3 -20.1 -0.8 -8.1 Q3 22 -20.3 -24.0 28.5	-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	-4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6 -5.7 -2.5 -6.8 Q1 22 34.2 34.0 52.6	5.6 6.9 7.1 8.6 7.6 9.4 5.3 26.8 1.4 7.1 Nov-22 -9.2 -6.5 -10.2	8.1 6.4 3.0 9.4 8.8 9.7 8.5 -14.7 6.4 6.5 Oct-22 7.0 5.4 7.0	-9.2 -6.5 -5.2 -5.6 -5.8 -4.1 -6.6 -13.1 -6.9 -12.7 Sep-22 -8.8 -8.7 21.6
S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent WTI	4,072 443 7,556 14,529 6,742 24,622 8,383 18,675 27,778 315 Latest 85.4 80.3	-0.1 -0.2 0.0 0.3 -0.2 -0.3 -0.3 -1.6 -2.2 1 Day -1.3	0.0 -0.2 0.8 -0.2 0.9 0.1 0.0 0.2 0.4 -0.7 -1.9 MTD 0.0 -0.3	-26.2 -13.3 -6.3 6.1 -8.5 -2.8 -5.8 -0.5 -17.4 -1.5 -19.1 YTD 9.7 6.5	-3.9 -4.9 -4.3 -2.7 -5.2 -2.5 -2.4 -8.3 -20.1 -0.8 -8.1 Q3 22 -20.3 -24.0	-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	-4.6 -5.9 2.9 -9.3 -6.7 -8.1 -2.6 -5.7 -2.5 -6.8 Q1 22 34.2 34.0	5.6 6.9 7.1 8.6 7.6 9.4 5.3 26.8 1.4 7.1 Nov-22 -9.2 -6.5	8.1 6.4 3.0 9.4 8.8 9.7 8.5 -14.7 6.4 6.5 Oct-22 7.0 5.4	-9.2 -6.5 -5.2 -5.6 -5.8 -4.1 -6.6 -13.1 -6.9 -12.7 Sep-22 -8.8 -8.7

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.

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