Daily Bulletin



A Prudential plc company

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STOCKS | BONDS | INTEREST RATES | COMMODITIES | CURRENCIES

아시아 증시는 금요일 대체로 상승 마감했습니다. 중국 증시는 경제의 다른 부문이 안정화 조짐 을 보였음에도 불구하고 부동산 섹터 부진이 8월 악화되었다는 지표가 발표되며 하락했습니다. 한국의 주가는 경제지표 호조에 힘입어 상승세를 보이며 한 주를 마무리했습니다. 일본 시장은 SoftBank Group의 Arm Holdings 가 시장에 강세를 보이며 데뷔한 후 기술주가 강세를 보였고 Tokyo Electron이 3% 이상 오르며 상승세를 보였습니다. 유럽 증시는 예상보다 양호한 중국 지표가 명품주를 끌어올렸고 투자자들은 유럽중앙은행의 금리 인상이 거의 끝났다는 신호에 안도하며 금요일 상승했습니다. 가정용품이 1.4% 넘게 오르며 상승을 주도했고, 대부분의 섹터 및 주요 증시가 상승했습니다. Games Workshop Group은 분기 세전 이익이 증가할 것으로 예상된다는 소식에 10.5% 넘게 상승했습니다. 그러나 스웨덴의 H&M은 최근 분기 매출이 제자리걸음을 보인 후 약 7.5% 하락했습니다.

미국 증시는 소비자 수요 약세에 대한 우려로 반도체 제조업체 주가가 하락하고 국채 금리 상승이 아마존과 기타 대형 성장주기업에 압력을 가하면서 금요일 급락세로 마감했습니다. S&P 500 주요 11개 섹터 모두 IT 주도로 하락세 로 마감했습니다. Nuco의 주가는 3분기 실적에 대해 예상보다 약한 전망치를 제시한 후 5%넘게 하락했습니다. 그러나 General Motors 전미 자동차노동조합의 표적 파업이 시작되면서 1% 상승했습니다.

미 국채 금리는 시장이 최신 경제 지표를 받아들이고 투자자들이 금리에 미칠 영향을 고려하면서 금요일 상승했습니다. 한편, 벤치마크 10년 만기 국채 금리는 4.33%를 기록했습니다.

국제 유가는 사우디아라비아의 감산으로 인한 공급 부족과 중국 의 원유 수요 증가에 대한 낙관론 이 맞물리면서 금요일 상승하며 3주 연속 상승세를 기록했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q2 23	Q1 23	Q4 22	Aug-23	Jul-23	Jun-23
World	681	-0.6	-0.6	14.5	6.3	7.4	9.9	-2.8	3.7	5.9
United States	4,234	-1.2	-1.2	17.7	8.7	7.7	7.1	-1.7	3.4	6.7
Europe	1,886	0.3	-0.8	12.2	3.1	10.7	19.4	-4.0	3.1	4.8
Japan	3,620	0.5	2.7	17.0	6.4	6.4	13.3	-2.4	3.0	4.1
Emerging Markets	985	0.3	0.6	5.5	1.0	4.0	9.8	-6.1	6.3	3.9
Asia Pac Ex Japan	509	0.6	0.6	3.2	-0.9	4.1	12.2	-6.1	5.8	3.2
Asia Ex Japan	626	0.5	0.7	3.3	-1.1	4.4	11.4	-6.4	6.2	2.8
Australia	834	1.2	0.1	2.7	0.3	2.8	15.7	-4.3	4.0	5.1
Hong Kong	8,566	0.8	-3.0	-15.5	-5.0	-2.4	18.2	-8.6	2.8	3.4
China H	59	0.2	-0.7	-5.2	-9.6	4.7	13.5	-9.0	10.9	4.0
China A	1,670	-0.5	-1.3	-9.2	-10.6	4.7	4.3	-7.9	6.8	-0.8
Korea	480	1.1	2.0	15.0	4.5	9.7	18.5	-7.6	6.5	0.7
Taiwan	576	0.8	1.7	18.1	4.8	14.8	9.7	-4.4	1.0	2.0
Thailand	354	-0.3	-3.5	-8.3	-8.1	-1.6	16.1	-2.7	8.1	-2.0
Malaysia	246	0.6	0.4	-5.7	-8.4	-3.6	14.0	-3.1	9.7	-1.9
Singapore	3,021	0.9	0.8	2.0	-5.6	7.1	10.5	-8.5	9.3	1.7
Indonesia	810	0.3	-1.7	8.0	3.2	6.5	-3.5	-1.4	1.4	-0.2
India	843	0.2	3.8	10.6	12.4	-6.3	2.1	-1.9	3.0	4.8
Philippines	384	-1.7	-1.5	-6.2	-1.1	2.7	21.2	-9.2	3.3	2.0
Local Indices	Latest	1 Day	MTD	YTD	Q2 23	Q1 23	Q4 22	Aug-23	Jul-23	Jun-23
Local Indices DJIA	Latest 34,618	1 Day -0.8	-0.2	6.1	4.0	0.9	Q4 22 16.0	-2.0	Jul-23 3.4	Jun-23 4.7
DJIA Nasdaq	34,618 13,708	-0.8 -1.6	-0.2 -2.3	6.1 31.8	4.0 13.1	0.9 17.0	16.0 -0.8	-2.0 -2.1	3.4 4.1	
DJIA Nasdaq S&P 500	34,618 13,708 4,450	-0.8 -1.6 -1.2	-0.2 -2.3 -1.2	6.1 31.8 17.3	4.0 13.1 8.7	0.9 17.0 7.5	16.0 -0.8 7.6	-2.0 -2.1 -1.6	3.4 4.1 3.2	4.7 6.7 6.6
DJIA Nasdaq S&P 500 Euro Stoxx 600	34,618 13,708 4,450 462	-0.8 -1.6 -1.2 0.2	-0.2 -2.3 -1.2 0.8	6.1 31.8 17.3 11.9	4.0 13.1 8.7 2.7	0.9 17.0 7.5 8.6	16.0 -0.8 7.6 9.9	-2.0 -2.1 -1.6 -2.5	3.4 4.1 3.2 2.2	4.7 6.7 6.6 2.4
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100	34,618 13,708 4,450 462 7,711	-0.8 -1.6 -1.2 0.2 0.5	-0.2 -2.3 -1.2 0.8 3.7	6.1 31.8 17.3 11.9 6.8	4.0 13.1 8.7 2.7 -0.3	0.9 17.0 7.5 8.6 3.6	16.0 -0.8 7.6 9.9 8.7	-2.0 -2.1 -1.6 -2.5 -2.5	3.4 4.1 3.2 2.2 2.3	4.7 6.7 6.6 2.4 1.4
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX	34,618 13,708 4,450 462 7,711 15,894	-0.8 -1.6 -1.2 0.2 0.5 0.6	-0.2 -2.3 -1.2 0.8 3.7 -0.3	6.1 31.8 17.3 11.9 6.8 14.1	4.0 13.1 8.7 2.7 -0.3 3.3	0.9 17.0 7.5 8.6 3.6 12.2	16.0 -0.8 7.6 9.9 8.7 14.9	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0	3.4 4.1 3.2 2.2 2.3 1.9	4.7 6.7 6.6 2.4 1.4 3.1
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40	34,618 13,708 4,450 462 7,711 15,894 7,379	-0.8 -1.6 -1.2 0.2 0.5 0.6 1.0	-0.2 -2.3 -1.2 0.8 3.7 -0.3 0.8	6.1 31.8 17.3 11.9 6.8 14.1 17.2	4.0 13.1 8.7 2.7 -0.3 3.3 3.5	0.9 17.0 7.5 8.6 3.6 12.2	16.0 -0.8 7.6 9.9 8.7 14.9	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0 -2.4	3.4 4.1 3.2 2.2 2.3 1.9	4.7 6.7 6.6 2.4 1.4 3.1 4.5
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB	34,618 13,708 4,450 462 7,711 15,894 7,379 28,895	-0.8 -1.6 -1.2 0.2 0.5 0.6 1.0	-0.2 -2.3 -1.2 0.8 3.7 -0.3 0.8 0.2	6.1 31.8 17.3 11.9 6.8 14.1 17.2 26.7	4.0 13.1 8.7 2.7 -0.3 3.3 3.5 7.2	0.9 17.0 7.5 8.6 3.6 12.2 13.4	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0 -2.4 -2.7	3.4 4.1 3.2 2.2 2.3 1.9 1.4 5.4	4.7 6.7 6.6 2.4 1.4 3.1 4.5
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35	34,618 13,708 4,450 462 7,711 15,894 7,379 28,895 9,550	-0.8 -1.6 -1.2 0.2 0.5 0.6 1.0	-0.2 -2.3 -1.2 0.8 3.7 -0.3 0.8 0.2	6.1 31.8 17.3 11.9 6.8 14.1 17.2 26.7 19.8	4.0 13.1 8.7 2.7 -0.3 3.3 3.5 7.2 5.8	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0 -2.4 -2.7 -1.4	3.4 4.1 3.2 2.2 2.3 1.9 1.4 5.4	4.7 6.7 6.6 2.4 1.4 3.1 4.5 8.6 6.5
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	34,618 13,708 4,450 462 7,711 15,894 7,379 28,895 9,550 18,239	-0.8 -1.6 -1.2 0.2 0.5 0.6 1.0 0.1 0.0	-0.2 -2.3 -1.2 0.8 3.7 -0.3 0.8 0.2 0.5 -0.6	6.1 31.8 17.3 11.9 6.8 14.1 17.2 26.7 19.8 -4.9	4.0 13.1 8.7 2.7 -0.3 3.3 3.5 7.2 5.8 -6.0	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0 -2.4 -2.7 -1.4	3.4 4.1 3.2 2.2 2.3 1.9 1.4 5.4 1.4 7.2	4.7 6.7 6.6 2.4 1.4 3.1 4.5 8.6 6.5 4.5
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	34,618 13,708 4,450 462 7,711 15,894 7,379 28,895 9,550 18,239 33,533	-0.8 -1.6 -1.2 0.2 0.5 0.6 1.0 0.1 0.0 0.7	-0.2 -2.3 -1.2 0.8 3.7 -0.3 0.8 0.2 0.5 -0.6 2.8	6.1 31.8 17.3 11.9 6.8 14.1 17.2 26.7 19.8 -4.9 30.1	4.0 13.1 8.7 2.7 -0.3 3.3 3.5 7.2 5.8 -6.0 18.5	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5 8.5	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0 -2.4 -2.7 -1.4 -8.2 -1.6	3.4 4.1 3.2 2.2 2.3 1.9 1.4 5.4 1.4 7.2 0.0	4.7 6.7 6.6 2.4 1.4 3.1 4.5 8.6 6.5 4.5 7.6
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng	34,618 13,708 4,450 462 7,711 15,894 7,379 28,895 9,550 18,239	-0.8 -1.6 -1.2 0.2 0.5 0.6 1.0 0.1 0.0	-0.2 -2.3 -1.2 0.8 3.7 -0.3 0.8 0.2 0.5 -0.6	6.1 31.8 17.3 11.9 6.8 14.1 17.2 26.7 19.8 -4.9	4.0 13.1 8.7 2.7 -0.3 3.3 3.5 7.2 5.8 -6.0	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0 -2.4 -2.7 -1.4	3.4 4.1 3.2 2.2 2.3 1.9 1.4 5.4 1.4 7.2	4.7 6.7 6.6 2.4 1.4 3.1 4.5 8.6 6.5 4.5
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei	34,618 13,708 4,450 462 7,711 15,894 7,379 28,895 9,550 18,239 33,533	-0.8 -1.6 -1.2 0.2 0.5 0.6 1.0 0.1 0.0 0.7	-0.2 -2.3 -1.2 0.8 3.7 -0.3 0.8 0.2 0.5 -0.6 2.8	6.1 31.8 17.3 11.9 6.8 14.1 17.2 26.7 19.8 -4.9 30.1	4.0 13.1 8.7 2.7 -0.3 3.3 3.5 7.2 5.8 -6.0 18.5	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5 8.5	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0 -2.4 -2.7 -1.4 -8.2 -1.6	3.4 4.1 3.2 2.2 2.3 1.9 1.4 5.4 1.4 7.2 0.0	4.7 6.7 6.6 2.4 1.4 3.1 4.5 8.6 6.5 4.5 7.6
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI	34,618 13,708 4,450 462 7,711 15,894 7,379 28,895 9,550 18,239 33,533 345	-0.8 -1.6 -1.2 0.2 0.5 0.6 1.0 0.1 0.0 0.7 1.1	-0.2 -2.3 -1.2 0.8 3.7 -0.3 0.8 0.2 0.5 -0.6 2.8 1.8	6.1 31.8 17.3 11.9 6.8 14.1 17.2 26.7 19.8 -4.9 30.1 21.4	4.0 13.1 8.7 2.7 -0.3 3.3 3.5 7.2 5.8 -6.0 18.5 6.9	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5 8.5	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8 5.3	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0 -2.4 -2.7 -1.4 -8.2 -1.6 -4.7	3.4 4.1 3.2 2.2 2.3 1.9 1.4 5.4 1.4 7.2 0.0 5.0	4.7 6.7 6.6 2.4 1.4 3.1 4.5 8.6 6.5 4.5 7.6
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities	34,618 13,708 4,450 462 7,711 15,894 7,379 28,895 9,550 18,239 33,533 345 Latest	-0.8 -1.6 -1.2 0.2 0.5 0.6 1.0 0.1 0.0 0.7 1.1 1.1 1 Day	-0.2 -2.3 -1.2 0.8 3.7 -0.3 0.8 0.2 0.5 -0.6 2.8 1.8	6.1 31.8 17.3 11.9 6.8 14.1 17.2 26.7 19.8 -4.9 30.1 21.4 YTD	4.0 13.1 8.7 2.7 -0.3 3.3 3.5 7.2 5.8 -6.0 18.5 6.9	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5 8.5 11.5	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8 5.3	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0 -2.4 -2.7 -1.4 -8.2 -1.6 -4.7 Aug-23	3.4 4.1 3.2 2.2 2.3 1.9 1.4 5.4 1.4 7.2 0.0 5.0	4.7 6.7 6.6 2.4 1.4 3.1 4.5 8.6 6.5 7.6 -0.3 Jun-23
DJIA Nasdaq S&P 500 Euro Stoxx 600 FTSE100 DAX CAC 40 FTSE MIB Ibex 35 Hang Seng Nikkei KOSPI Bonds and Commodities Brent	34,618 13,708 4,450 462 7,711 15,894 7,379 28,895 9,550 18,239 33,533 345 Latest 93.9	-0.8 -1.6 -1.2 0.2 0.5 0.6 1.0 0.1 0.0 0.7 1.1 1.1 1 Day	-0.2 -2.3 -1.2 0.8 3.7 -0.3 0.8 0.2 0.5 -0.6 2.8 1.8 MTD	6.1 31.8 17.3 11.9 6.8 14.1 17.2 26.7 19.8 -4.9 30.1 21.4 YTD	4.0 13.1 8.7 2.7 -0.3 3.3 3.5 7.2 5.8 -6.0 18.5 6.9 Q2 23 -5.8 -5.6	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5 8.5 11.5 Q1 23	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8 5.3 Q4 22 -2.2 -1.5	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0 -2.4 -2.7 -1.4 -8.2 -1.6 -4.7 Aug-23	3.4 4.1 3.2 2.2 2.3 1.9 1.4 5.4 1.4 7.2 0.0 5.0 Jul-23	4.7 6.7 6.6 2.4 1.4 3.1 4.5 8.6 6.5 4.5 7.6 -0.3 Jun-23
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	34,618 13,708 4,450 462 7,711 15,894 7,379 28,895 9,550 18,239 33,533 345 Latest 93.9 90.8	-0.8 -1.6 -1.2 0.2 0.5 0.6 1.0 0.1 0.0 0.7 1.1 1.1 1 Day 0.2 0.1	-0.2 -2.3 -1.2 0.8 3.7 -0.3 0.8 0.2 0.5 -0.6 2.8 1.8 MTD 8.2 8.6	6.1 31.8 17.3 11.9 6.8 14.1 17.2 26.7 19.8 -4.9 30.1 21.4 YTD 9.2 12.7	4.0 13.1 8.7 2.7 -0.3 3.3 3.5 7.2 5.8 -6.0 18.5 6.9 Q2 23	0.9 17.0 7.5 8.6 3.6 12.2 13.4 15.1 12.8 3.5 8.5 11.5 Q1 23	16.0 -0.8 7.6 9.9 8.7 14.9 12.6 15.6 12.8 15.0 0.8 5.3 Q4 22	-2.0 -2.1 -1.6 -2.5 -2.5 -3.0 -2.4 -2.7 -1.4 -8.2 -1.6 -4.7 Aug-23	3.4 4.1 3.2 2.2 2.3 1.9 1.4 5.4 1.4 7.2 0.0 5.0 Jul-23 14.2 15.8	4.7 6.7 6.6 2.4 1.4 3.1 4.5 8.6 6.5 4.5 7.6 -0.3 Jun-23 3.2 3.7

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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