

**아시아 증시**는 금요일 혼조세로 마감되었습니다. 중국 증시는 거의 변동이 없었지만 새로운 부양책과 긍정적 지표에 힘입어 주간 단위 상승세를 보였습니다. 한국 시장은 삼성과 SK 하이닉스의 주가가 하락하면서 하락했습니다. 일본 시장은 유럽의 새로운 코로나바이러스 관련 제한으로 빠른 세계 경제 회복에 대한 희망이 흐려지면서 하락 마감했습니다. 호주 증시는 리우 틴도가 중국 밖의 철강 생산에 대한 우려를 제기하며 광업주가 약세를 보이며 소폭 하락했습니다. 인도 주식은 금속과 은행주 주도 하에 상승세를 보였습니다.

**유럽 증시**는 금요일 코로나 바이러스 백신이 연말 전에 미국에서 출시될 수 있을 것이라는 희망과 분기 실적 호조에 힘입어 상승했습니다. STOXX 600 지수는 1.3% 상승 마감했습니다. 기업 관련으로는 Thyssenkrupp는 Liberty Steel이 해당 기업의 철강 사업부에 구속력이 없는 인수 제안을 했다고 발표하면서 10% 이상 급등했습니다. LVMH는 루이비통 핸드백의 매출 회복에 7% 이상 상승했습니다. Volvo는 예상보다 견조한 실적 발표 후에 3% 이상 상승했습니다.

**미국 증시**는 금요일 백신 개발 일정에 대한 명확성과 예상보다 낮은 소매 판매 지표가 투자자들을 다시 시장에 불러들임으로써 상승세를 보였습니다. Pfizer는 11월에 백신에 대한 미국 허가를 신청할 수 있다고 발표한 후 3% 이상 상승했습니다. Schlumberger NV는 원유 가격 하락과 수요 감소로 인해 3분기 연속 손실을 기록한 후 8% 이상 하락했습니다. Peloton Interactive는 인기 있는 운동용 자전거의 페달 불량 리콜을 발표한 후 3% 이상 하락했습니다.

**미국채 금리**는 지난 9월 미국 소매 판매량이 예상보다 증가했고 10월 초 소비자 신뢰도가 개선된 것으로 나타난 경제지표의 영향으로 소폭 상승했습니다.

**국제 유가**는 미국과 유럽의 코로나바이러스 환자 급증으로 인해 세계 최대 연료 소비의 두 지역에서 원유 수요가 계속 감소할 것이라는 우려로 인해 소폭 하락했습니다.

MSCI	Latest	1 Day	MTD	YTD	Q3 20	Q2 20	Q1 20	Sep-20	Aug-20	Jul-20
World	583	0.2	3.3	5.1	8.3	19.4	-21.3	-3.2	6.2	5.3
United States	3,379	0.0	3.9	11.4	9.6	21.8	-19.7	-3.7	7.5	5.9
Europe	1,624	1.5	1.8	-6.8	4.6	15.6	-24.2	-3.3	4.1	3.9
Japan	3,344	-1.0	-0.2	-0.5	7.1	11.6	-16.6	1.1	7.6	-1.6
Emerging Markets	1,124	0.3	4.0	3.0	9.7	18.2	-23.6	-1.6	2.2	9.0
Asia Pac Ex Japan	581	0.2	4.2	7.3	9.6	18.5	-20.7	-2.3	3.8	8.0
Asia Ex Japan	742	0.4	4.1	10.0	10.8	16.8	-18.4	-1.5	3.6	8.6
Australia	759	-0.6	4.7	-7.3	2.8	29.0	-33.2	-6.8	5.6	4.5
Hong Kong	10,649	-0.2	1.0	-7.5	1.6	9.2	-17.3	-5.2	7.9	-0.7
China H	103	1.2	5.6	23.2	12.6	15.4	-10.2	-2.7	5.7	9.5
China A	2,272	0.2	5.7	28.2	15.4	15.8	-9.2	-4.3	4.8	15.1
Korea	507	-1.1	3.0	8.0	12.9	19.6	-22.4	3.1	2.1	7.2
Taiwan	503	-0.7	2.9	18.6	17.1	21.5	-19.0	2.1	-1.7	16.6
Thailand	324	-0.6	1.3	-28.5	-14.0	23.8	-33.7	-9.5	-2.2	-2.9
Malaysia	308	-0.5	1.4	-4.5	2.6	13.6	-19.2	-1.7	-3.7	8.3
Singapore	3,079	0.9	3.6	-19.3	-1.0	9.6	-28.2	-3.1	2.0	0.2
Indonesia	632	0.0	7.3	-24.7	-6.8	24.4	-39.4	-13.0	2.6	4.4
India	581	0.5	3.9	-0.7	15.1	20.6	-31.1	0.6	3.5	10.5
Philippines	426	-0.7	0.2	-20.4	-2.6	19.8	-32.0	-0.7	1.0	-2.9
Local Indices	Latest	1 Day	MTD	YTD	Q3 20	Q2 20	Q1 20	Sep-20	Aug-20	Jul-20
DJIA	28,606	0.4	3.0	2.1	8.2	18.5	-22.7	-2.2	7.9	2.5
Nasdaq	11,672	-0.4	4.5	31.0	11.2	30.9	-14.0	-5.1	9.7	6.9
S&P 500	3,484	0.0	3.7	9.4	8.9	20.5	-19.6	-3.8	7.2	5.6
Euro Stoxx 600	367	1.3	1.8	-9.5	0.7	13.8	-22.5	-1.4	3.1	-0.9
FTSE100	5,920	1.5	1.0	-19.4	-4.0	9.1	-23.8	-1.5	1.8	-4.2
DAX	12,909	1.6	1.2	-2.6	3.7	23.9	-25.0	-1.4	5.1	0.0
CAC 40	4,936	2.0	2.8	-15.6	-2.0	13.5	-26.1	-2.7	3.4	-2.6
FTSE MIB	19,390	1.7	2.0	-15.8	-1.4	15.1	-27.2	-3.0	2.8	-1.1
Ibex 35	6,850	0.5	2.0	-26.5	-6.6	8.1	-28.6	-3.6	1.3	-4.4
Hang Seng	24,387	0.9	4.0	-10.8	-2.6	4.7	-15.9	-6.4	2.5	1.5
Nikkei	23,411	-0.4	1.0	0.7	4.7	18.0	-19.2	0.8	6.6	-2.6
KOSPI	312	-0.7	0.8	6.9	10.7	18.6	-19.2	0.9	2.6	6.9
Bonds and Commodities	Latest	1 Day	MTD	YTD	Q3 20	Q2 20	Q1 20	Sep-20	Aug-20	Jul-20
Brent	42.9	-0.5	4.8	-35.0	-0.5	81.0	-66.8	-9.6	4.6	5.2
WTI	40.8	-0.3	2.3	-33.2	1.5	91.7	-66.8	-7.0	6.4	2.5
US 10Y yield	0.76	2.7	10.1	-60.4	4.5	-5.7	-63.2	-4.2	30.9	-16.7
US 3M yield	0.11	0.0	10.0	-92.9	-37.5	45.5	-93.0	-9.1	22.2	-43.8
US 2Y yield	0.14	0.0	7.7	-91.1	-18.8	-30.4	-85.4	-7.1	27.3	-31.3

Source: Eastspring Investments (Singapore) Limited., MSCI from Bloomberg in USD terms. All data extracted from Bloomberg are in local currency terms except those denoted by "+", which are in USD terms. % Chg and net change refers to the change compared to previous trading day. YTD stands for year to date. # Libor rates come from British Bankers Association. NA represents not available.

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