

아시아 증시는 미국의 코로나 바이러스 지원법안에 대한 기대감과 경기 부양책에 힘입어 투자심리가 부양되며 상승 마감했습니다. 일본 닛케이 지수는 약세를 보였으며, 호주의 벤치마크는 저조한 실적을 보였지만, 나머지 아시아 증시의 상승세가 두드러졌습니다. 한국 코스피가 2018년 10월 이후 최고치를 기록했습니다. 6월보다 느리지만 서비스 부문은 계속 확대되고 있는 것으로 나타났기 때문에 중국 시장도 강세를 보였습니다.

유럽 증시는 실적 호조와 상품주 급등으로 시장이 회복됐지만, 전세계적으로 코로나바이러스 환자가 급증하면서 상승세는 제한되는 모습을 보였습니다. 런던에 상장된 광업주 그룹인 리오 틴토, BHP 그룹, 글렌코어는 금속 가격 강세에 힘입어 4.0% 가량 상승했습니다. 석유 메이저 BP와 토탈은 미국 원유 재고 감소와 달러 약세로 유가가 상승하면서 약 2% 상승했습니다.

미국 증시는 디즈니의 분기별 어닝 서프라이즈에 이어 투자자들이 코로나바이러스 재정 지원책에 대한 협상이 임박했다고 낙관하면서 상승 마감했습니다. 디즈니 주식은 거의 9퍼센트나 상승하며 S&P 500과 다우지수의 강세에 가장 크게 기여했습니다. 디즈니 공원과 미디어 네트워크의 수익 감소가 우려했던 것만큼 나쁘지 않았기 때문에 해당 주식은 3월 24일 이후 가장 큰 일일 상승률을 기록했습니다. 성장에 민감한 금융, 산업 및 소재가 다른 S&P 섹터 대비 강세를 보였습니다.

미국채 10년 만기 금리는 장기 채권의 공급이 증가할 것이라는 전망에 가격이 하락함에 따라 상승했고 채권 금리 곡선은 가파르게 상승했습니다.

국제 유가는 미국 원유재고가 급감하고 달러화 가치가 약세를 보이자 지난 3월 초 이후 최고치로 올랐지만 코로나바이러스 감염이 급증하면서 투자자들은 여전히 수요 전망을 우려하고 있습니다.

MSCI	Latest	Yday	MTD	YTD	Q2	Q1	Jun-20	May-20	Since 17 Jan
World	564	0.9	2.2	1.2	19.4	-21.3	3.2	4.4	-2.1
United States	3,210	0.6	1.8	5.5	21.8	-19.6	2.3	5.2	1.5
Europe	1,637	1.5	2.9	-6.4	15.6	-24.2	4.1	4.7	-8.7
Japan	3,227	0.3	3.9	-4.8	11.6	-16.6	0.0	5.9	-4.9
Emerging Markets	1,103	1.2	2.3	0.7	18.2	-23.6	7.4	0.8	-3.4
Asia Pac Ex Japan	565	0.9	2.5	4.0	18.5	-20.7	8.2	-0.3	-0.5
Asia Ex Japan	719	1.0	2.6	6.2	16.8	-18.4	8.4	-1.1	1.4
Australia	758	0.3	1.8	-8.4	29.0	-33.2	7.0	4.6	-11.6
Hong Kong	10,620	0.3	2.3	-8.4	9.2	-17.3	11.0	-8.4	-13.4
China H	99.1	1.1	4.2	18.2	15.4	-10.2	9.0	-0.5	11.2
China A	2,201	1.0	2.5	24.1	15.8	-9.2	10.5	-2.0	18.8
Korea	481	1.6	2.5	2.1	19.6	-22.4	8.2	2.2	-3.2
Taiwan	494	0.8	0.8	15.7	21.5	-19.0	9.2	-2.5	13.6
Thailand	366	1.0	0.7	-19.7	23.8	-33.7	2.1	4.4	-20.1
Malaysia	319	0.2	-1.2	-1.8	13.6	-19.2	2.7	4.8	-3.2
Singapore	427	1.3	0.9	-20.5	9.5	-28.2	4.4	-3.2	-22.6
Indonesia	660	1.8	-0.1	-21.4	24.4	-39.4	7.2	3.3	-25.6
India	539	0.3	0.4	-7.9	20.6	-31.1	6.8	-2.8	-10.7
Philippines	420	1.2	-1.3	-21.8	19.8	-32.0	8.2	1.6	-21.5
Local Indices	Latest	Yday	MTD	YTD	Q2	Q1	Jun-20	May-20	Since 17 Jan
DJIA	27,201.5	1.4	2.9	-3.4	18.5	-22.7	1.8	4.7	-7.4
Nasdaq	10,998.4	0.5	2.4	23.2	31.0	-14.0	6.1	6.9	17.1
S&P 500	3,327.8	0.6	1.7	4.2	20.5	-19.6	2.0	4.8	0.3
Euro Stoxx 600	365.2	0.5	2.5	-10.4	13.8	-22.5	3.1	3.5	-12.7
FTSE100	6,104.7	1.1	3.5	-17.6	9.2	-23.8	1.7	3.3	-19.9
DAX	12,660.3	0.5	2.8	-4.4	23.9	-25.0	6.3	6.7	-6.8
CAC 40	4,933.3	0.9	3.1	-15.9	13.5	-26.2	5.5	3.4	-18.4
FTSE MIB	19,740.2	0.6	3.4	-14.3	15.1	-27.2	6.8	3.8	-17.1
Ibex 35	7,039.7	0.3	2.4	-24.5	8.1	-28.6	2.8	2.6	-26.0
Hang Seng	25,102.5	0.6	2.1	-8.7	4.7	-15.9	7.4	-6.3	-12.0
Kospi	306.6	1.2	2.4	5.0	18.6	-19.2	4.7	3.9	0.5
Bonds and Commods	Latest	Yday	MTD	YTD	Q2	Q1	Jun-20	May-20	Since 17 Jan
Brent	45.3	1.9	5.0	-31.7	82.5	-65.9	16.4	38.8	-31.2
WTI	42.2	1.2	6.1	-30.9	91.8	-66.5	16.5	78.9	-28.8
US 10Y yield	0.55	8	3	-72	-5	-64	1	-0	-72
US 3M yield	0.10	2.0	7	-94	11	-92	4	34	-94
US 2Y yield	0.12	5.4	5	-93	-32	-85	-1	-17	-93

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