

아시아 증시는 미국 경기부양책에 대한 기대와 함께 투자자들이 미-중간 긴장과 경제지표 검색에도 주목하며 혼조세를 보이는 가운데 소폭 상승 마감했습니다. 호주의 주식은 정부가 실업률 전망치를 상향 조정하고 새로운 금리로 인해 3분기 성장률이 약 2.5%포인트 하락할 것이라고 발표한 후 하락세를 보였습니다. 이는 전일 약세를 보인 미국 고용과 예상치 못한 16.5%의 필리핀 성장 후퇴에 따른 것입니다. 한국은 지수 대표주 삼성이 주도하며 거의 2년 만에 최고치를 기록했습니다.

유럽 증시는 글렌코어가 배당을 취소하고 원유주 주도 하에 하락했고 투자자들은 미국 경기부양에 대한 진전에 주목했습니다. 금주 반등했던 유럽의 광업지수는 글렌코어가 주요 광업 기업 중 처음으로 배당을 취소하고 부채를 줄이는 것을 우선시하겠다고 밝힌 후 2.5% 하락했습니다. 런던 FTSE 100 지수도 BoE가 경제가 이전에 예측했던 것보다 Covid-19 침체에서 회복하는 데 더 오랜 시간이 걸리지만 금리를 인하할 유인이 없다고 판단하며 파운드 강세 속에 약세를 보였습니다.

미국 증시는 새로운 경기 부양책에 대한 희망으로 희망함에 따라 장 초반 부진을 극복하고 상승 마감했습니다. 목요일 발표된 자료는 7월 기업들이 발표한 54%의 감원 발표에도 불구하고 미국 노동부 수치가 3주 만에 처음으로 실업수당 신청이 감소한 것으로 나타났기 때문에 혼조세를 보였습니다. 투자자들은 구제금융안을 기대하고 있지만, 매킨리 상원 원내총무는 목요일 공화당과 민주당이 구제금융안에 대해 큰 견해 차이를 보이고 있다고 말했습니다.

미국채 10년 만기 금리는 연방 정부의 일자리 보고에 앞서 투자자들이 주요 움직임을 유보함에 따라 대체로 변동이 없었습니다. 이번 주 세 건의 별도 보고서는 미국의 코로나바이러스 감염이 경제 재개를 위한 노력을 무색하게 하면서 노동시장의 회복세가 둔화되고 있음을 보여주었습니다.

국제 유가는 연료 수요에 대한 약세 심리가 이라크의 공급 감소에 대한 낙관론에 역행하면서 하락세를 보였습니다.

MSCI	Latest	Yday	MTD	YTD	Q2	Q1	Jun-20	May-20	Since 17 Jan
World	565	0.2	2.4	1.4	19.4	-21.3	3.2	4.4	-1.3
United States	3,229	0.6	2.4	6.1	21.8	-19.6	2.3	5.2	2.2
Europe	1,619	-1.1	1.9	-7.3	15.6	-24.2	4.1	4.7	-7.3
Japan	3,217	-0.3	3.6	-5.1	11.6	-16.6	0.0	5.9	-4.6
Emerging Markets	1,107	0.3	2.6	1.0	18.2	-23.6	7.4	0.8	-2.2
Asia Pac Ex Japan	568	0.5	3.0	4.5	18.5	-20.7	8.2	-0.3	0.3
Asia Ex Japan	722	0.5	3.1	6.7	16.8	-18.4	8.4	-1.1	2.4
Australia	764	0.8	2.7	-7.6	29.0	-33.2	7.0	4.6	-11.3
Hong Kong	10,577	-0.4	1.8	-8.8	9.2	-17.3	11.0	-8.4	-13.2
China H	98.9	-0.1	4.1	18.0	15.4	-10.2	9.0	-0.5	12.4
China A	3,349	0.6	2.4	4.8	20.5	-19.6	2.0	4.8	1.0
Korea	490	2.0	4.6	4.2	19.6	-22.4	8.2	2.2	-1.6
Taiwan	500	1.1	2.0	17.1	21.5	-19.0	9.2	-2.5	14.6
Thailand	365	-0.4	0.3	-20.0	23.8	-33.7	2.1	4.4	-19.4
Malaysia	323	1.4	0.2	-0.4	13.6	-19.2	2.7	4.8	-3.0
Singapore	431	1.0	1.9	-19.7	9.5	-28.2	4.4	-3.2	-21.6
Indonesia	666	1.0	0.9	-20.7	24.4	-39.4	7.2	3.3	-24.2
India	545	0.9	1.3	-7.0	20.6	-31.1	6.8	-2.8	-10.5
Philippines	426	1.4	0.0	-20.8	19.8	-32.0	8.2	1.6	-20.5
Local Indices	Latest	Yday	MTD	YTD	Q2	Q1	Jun-20	May-20	Since 17 Jan
DJIA	11,108.1	1.0	3.4	24.5	31.0	-14.0	6.1	6.9	17.7
Nasdaq	6,026.9	-1.3	2.3	-18.5	9.2	-23.8	1.7	3.3	-19.0
S&P 500	27,387.0	0.7	3.6	-2.7	18.5	-22.7	1.8	4.7	-6.1
Euro Stoxx 600	12,591.7	-0.5	2.3	-5.0	23.9	-25.0	6.3	6.7	-6.4
FTSE100	362.5	-0.7	1.8	-11.0	13.8	-22.5	3.1	3.5	-12.3
DAX	4,885.1	-1.0	2.1	-16.7	13.5	-26.2	5.5	3.4	-17.7
CAC 40	19,475.2	-1.3	2.0	-15.5	15.1	-27.2	6.8	3.8	-16.6
FTSE MIB	6,957.9	-1.2	1.2	-25.4	8.1	-28.6	2.8	2.6	-25.8
Ibex 35	24,930.6	-0.7	1.4	-9.4	4.7	-15.9	7.4	-6.3	-11.5
Hang Seng	311.3	1.5	4.0	6.6	18.6	-19.2	4.7	3.9	1.7
Kospi	293.0	0.3	3.4	13.5	22.1	-19.3	9.4	1.7	8.7
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

## DISCLAIMER

This document is produced by Eastspring Investments (Singapore) Limited and issued in:

- **Singapore and Australia (for wholesale clients only)** by Eastspring Investments (Singapore) Limited (UEN: 199407631H), which is incorporated in Singapore, is exempt from the requirement to hold an Australian financial services licence and is licensed and regulated by the Monetary Authority of Singapore under Singapore laws which differ from Australian laws.
- **Hong Kong** by Eastspring Investments (Hong Kong) Limited and has not been reviewed by the Securities and Futures Commission of Hong Kong.
- **Indonesia** by PT Eastspring Investments Indonesia, an investment manager that is licensed, registered and supervised by the Indonesia Financial Services Authority (OJK).
- **Malaysia** by Eastspring Investments Berhad (531241-U).
- **United States of America (for institutional clients only)** by Eastspring Investments (Singapore) Limited (UEN: 199407631H), which is incorporated in Singapore and is registered with the U.S Securities and Exchange Commission as a registered investment adviser.
- **European Economic Area (for professional clients only) and Switzerland (for qualified investors only)** by Eastspring Investments (Luxembourg) S.A., 26, Boulevard Royal, 2449 Luxembourg, Grand-Duchy of Luxembourg, registered with the Registre de Commerce et des Sociétés (Luxembourg), Register No B 173737.
- **United Kingdom (for professional clients only)** by Eastspring Investments (Luxembourg) S.A. - UK Branch, 125 Old Broad Street, London EC2N 1AR.
- **Chile (for institutional clients only)** by Eastspring Investments (Singapore) Limited (UEN: 199407631H), which is incorporated in Singapore and is licensed and regulated by the Monetary Authority of Singapore under Singapore laws which differ from Chilean laws.

The afore-mentioned entities are hereinafter collectively referred to as **Eastspring Investments**.

The views and opinions contained herein may not necessarily represent views expressed or reflected in other Eastspring Investments' communications. This document is solely for information purposes and does not have any regard to the specific investment objective, financial situation and/or particular needs of any specific persons who may receive this document. This document is not intended as an offer, a solicitation of offer or a recommendation, to deal in shares of securities or any financial instruments. It may not be published, circulated, reproduced or distributed without the prior written consent of Eastspring Investments. Reliance upon information in this posting is at the sole discretion of the reader. Please consult your own professional adviser before investing.

Investment involves risk. Past performance and the predictions, projections, or forecasts on the economy, securities markets or the economic trends of the markets are not necessarily indicative of the future or likely performance of Eastspring Investments or any of the funds managed by Eastspring Investments.

Information herein is believed to be reliable at time of publication. Data from third party sources may have been used in the preparation of this material and Eastspring Investments has not independently verified, validated or audited such data. Where lawfully permitted, Eastspring Investments does not warrant its completeness or accuracy and is not responsible for error of facts or opinion nor shall be liable for damages arising out of any person's reliance upon this information. Any opinion or estimate contained in this document may subject to change without notice.

Eastspring Investments (excluding JV companies) companies are ultimately wholly-owned/indirect subsidiaries/associate of Prudential plc of the United Kingdom. Eastspring Investments companies (including JV's) and Prudential plc are not affiliated in any manner with Prudential Financial, Inc., a company whose principal place of business is in the United States of America.

For more information contact: [content@eastspring.com](mailto:content@eastspring.com) | T: +65 6349 9100