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**미국 증시**는 화요일 S&P 500지수와 다우지수가 7일 연속 상승세를 마감하며 하락 마감했는데, 이는 재정 부양책을 둘러싼 미국 내 교착상태 타개 관련 불확실성의 증가에 대한 우려에서 비롯된 것입니다. 매킨돌 공화당 상원 원내대표는 백악관 협상자들이 화요일 의회에서 민주당 지도자들과 코로나바이러스 구제 협상을 재개하기 위해 대화를 나누지 않았다고 언급하면서, 장 초반 상승했던 시장은 하락세를 보였습니다.

**미국채 10년 만기 금리**는 이는 사상 최고치를 기록했던 증시가 하락 반전하면서 사상 최대인 10년 만기 채권을 매도하기 하루 전인 화요일에 상승했습니다.

**국제 유가**는 미국 경기부양 협상의 신속한 해결에 대한 희망이 흐려지면서 하락했지만, 아시아 석유 수요 회복 조짐과 미국 비축물량 예상보다 큰 감소에 대한 기대감 때문에 하락폭은 제한적이었습니다.

| MSCI              | Latest   | Yday | MTD  | YTD   | Q2   | Q1    | Jun-20 | May-20 | Since 17 Jan |
|-------------------|----------|------|------|-------|------|-------|--------|--------|--------------|
| World             | 564      | 0.0  | 2.2  | 1.3   | 19.4 | -21.3 | 3.2    | 4.4    | -1.3         |
| United States     | 3,206    | -0.8 | 1.7  | 5.4   | 21.8 | -19.6 | 2.3    | 5.2    | 2.9          |
| Europe            | 1,646    | 1.7  | 3.6  | -5.8  | 15.6 | -24.2 | 4.1    | 4.7    | -8.3         |
| Japan             | 3,262    | 1.8  | 5.1  | -3.8  | 11.6 | -16.6 | 0.0    | 5.9    | -5.3         |
| Emerging Markets  | 1,091    | 0.4  | 1.2  | -0.3  | 18.2 | -23.6 | 7.4    | 0.8    | -3.6         |
| Asia Pac Ex Japan | 562      | 0.5  | 2.0  | 3.5   | 18.5 | -20.7 | 8.2    | -0.3   | -0.7         |
| Asia Ex Japan     | 712      | 0.5  | 1.7  | 5.3   | 16.8 | -18.4 | 8.4    | -1.1   | 1.0          |
| Australia         | 773      | 0.8  | 3.8  | -6.6  | 29.0 | -33.2 | 7.0    | 4.6    | -10.3        |
| Hong Kong         | 10,700   | 2.1  | 3.0  | -7.7  | 9.2  | -17.3 | 11.0   | -8.4   | -14.3        |
| China H           | 95.4     | 0.6  | 0.4  | 13.8  | 15.4 | -10.2 | 9.0    | -0.5   | 7.6          |
| China A           | 3,334    | -0.8 | 2.0  | 4.4   | 20.5 | -19.6 | 2.0    | 4.8    | 2.0          |
| Korea             | 504      | 1.4  | 7.5  | 7.1   | 19.6 | -22.4 | 8.2    | 2.2    | 1.8          |
| Taiwan            | 492      | -1.1 | 0.5  | 15.4  | 21.5 | -19.0 | 9.2    | -2.5   | 15.5         |
| Thailand          | 366      | 1.6  | 0.6  | -19.8 | 23.8 | -33.7 | 2.1    | 4.4    | -20.7        |
| Malaysia          | 317      | -0.3 | -1.6 | -2.2  | 13.6 | -19.2 | 2.7    | 4.8    | -3.0         |
| Singapore         | 427      | 0.0  | 1.0  | -20.4 | 9.5  | -28.2 | 4.4    | -3.2   | -21.5        |
| Indonesia         | 663      | 0.6  | 0.5  | -21.0 | 24.4 | -39.4 | 7.2    | 3.3    | -24.2        |
| India             | 549      | 0.3  | 2.2  | -6.1  | 20.6 | -31.1 | 6.8    | -2.8   | -9.1         |
| Philippines       | 433      | 0.7  | 1.8  | -19.4 | 19.8 | -32.0 | 8.2    | 1.6    | -18.6        |
| Local Indices     | Latest   | Yday | MTD  | YTD   | Q2   | Q1    | Jun-20 | May-20 | Since 17 Jan |
| DJIA              | 10,782.8 | -1.7 | 0.4  | 20.9  | 31.0 | -14.0 | 6.1    | 6.9    | 17.5         |
| Nasdaq            | 6,154.3  | 1.7  | 4.5  | -16.8 | 9.2  | -23.8 | 1.7    | 3.3    | -19.6        |
| S&P 500           | 27,686.9 | -0.4 | 4.8  | -1.6  | 18.5 | -22.7 | 1.8    | 4.7    | -4.0         |
| Euro Stoxx 600    | 12,946.9 | 2.0  | 5.2  | -2.3  | 23.9 | -25.0 | 6.3    | 6.7    | -6.2         |
| FTSE100           | 370.8    | 1.7  | 4.1  | -9.0  | 13.8 | -22.5 | 3.1    | 3.5    | -12.4        |
| DAX               | 5,028.0  | 2.4  | 5.1  | -14.2 | 13.5 | -26.2 | 5.5    | 3.4    | -18.1        |
| CAC 40            | 20,209.1 | 2.8  | 5.9  | -12.3 | 15.1 | -27.2 | 6.8    | 3.8    | -17.0        |
| FTSE MIB          | 7,263.5  | 3.0  | 5.6  | -22.1 | 8.1  | -28.6 | 2.8    | 2.6    | -25.6        |
| Ibex 35           | 24,890.7 | 2.1  | 1.2  | -9.5  | 4.7  | -15.9 | 7.4    | -6.3   | -14.0        |
| Hang Seng         | 321.0    | 1.3  | 7.2  | 9.9   | 18.6 | -19.2 | 4.7    | 3.9    | 5.0          |
| Kospi             | 284.8    | 0.2  | 0.5  | 10.3  | 22.1 | -19.3 | 9.4    | 1.7    | 5.7          |
| Bonds and Commods | Latest   | Yday | MTD  | YTD   | Q2   | Q1    | Jun-20 | May-20 | Since 17 Jan |
| Brent             | 43.8     | 0.8  | 2.8  | -7.7  | 12.9 | -24.0 | 5.9    | -1.6   | -10.4        |
| WTI               | 42.2     | 1.2  | 6.1  | -30.9 | 91.8 | -66.5 | 16.5   | 78.9   | -28.8        |
| US 10Y yield      | 0.64     | 8    | 3    | -72   | -5   | -64   | 1      | -0     | -72          |
| US 3M yield       | 0.12     | 2.0  | 7    | -94   | 11   | -92   | 4      | 34     | -94          |
| US 2Y yield       | 0.15     | 5.4  | 5    | -93   | -32  | -85   | -1     | -17    | -93          |

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