❖ 시장 동향

◆ [주가] 미국, 유럽 증시 상승

- **미 DJIA +0.6%, 유럽 Stoxx +0.7%**

- 미국 증시는 유가 상승에 따른 에너지 관련주 주도로 올랐고, 유럽 증시는 도이체방크의 자회사 매각에 따른 자본확충 가능성 등으로 은행주 중심 상승
  - 미국 다우 +0.6%,
    유로 Stoxx +0.7%,
    중국 상하이 -0.3%

◆ [환 율] 미 달러화, 주요통화대비 강보합

- **달러/유로 1.1215→1.1217**
  엔/달러 100.43→100.69

- 미국 달러화는 연준의 주요 인사들의 연내 금리인상을 지지한다는 발언으로 엔화 대비 강세
  - 달러/유로 1.1215 → 1.1217
  - 엔/달러 100.43 → 100.69
  - 위안/달러 6.6701 → 6.6751

◆ [금리] 미 국채금리, 상승

- **미 국채금리, 상승(미 10년물 1.57%)**

- 채권시장에서의 연내 금리인상 확률이 50%를 약간 상회하는데 그치면서 미국 국채 금리는 상승 전환
  - 미국 10년물 1.56% → 1.57%
    2년물 0.74% → 0.76%
  - 독일 10년물 -0.14% → -0.15%

◆ [유가] WTI유 상승

- **WTI유 상승(WTI유 47.05달러/배럴)**

- OPEC이 일일 산유량 감축 합의에 성공하고, 비 OPEC 산유국에 감산 협조를 구할 계획이란 소식에 5%대 급등
  - WTI유 44.67달러/배럴 → 47.05달러/배럴
    두바이유 42.97달러/배럴 → 42.94달러/배럴
    브렌트유 45.97달러/배럴 → 48.78달러/배럴

❖ 주요 뉴스(블룸버그, 로이터 등)

- 미국 Fed 옐런 의장, 노동시장의 지속적인 개선으로 금리인상 가능성 시사
  - 루 재무장관, 미국 금리인상이 신흥국에 미치는 영향은 제한적
- ECB, 주식매입 규모는 2000억유로에 이를 전망
- 차이나 베이지 북(CBB), 3/4분기 경제성장 둔화 전망
- 일본 재무성, 조세피난처를 통한 탈세 방지위해 과세구조 강화
- 아시아개발은행, 아시아 신흥국 2016년 성장률 5.7%로 예상
- 트럼프의 Fed 비판, 중앙은행에 대한 정치적 압력을 시사
  - 도이체방크, 향후 문제는 자본이 아닌 자금조달

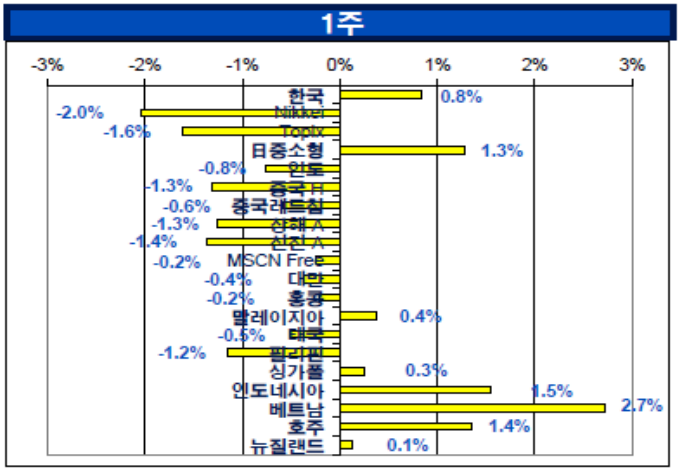
*출처 : 국제금융센터

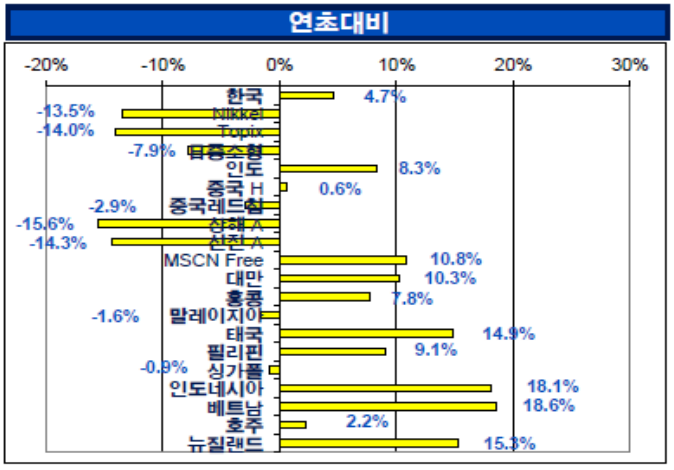
아시아 주식

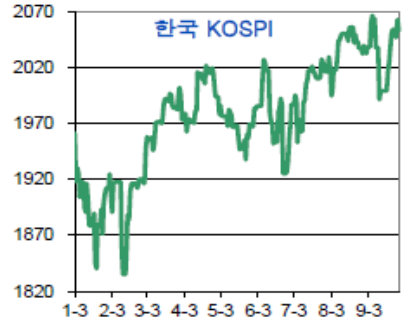
기준일 2016-9-28

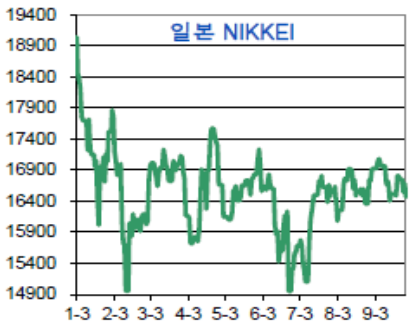
Schroders

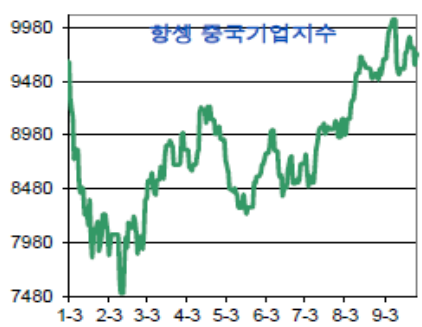
국가명		지수명	종가	1일	1주	1월	3월	6월	1년	2년	YTD
한국		KOSPI	2,053.1	-0.5%	0.8%	0.8%	6.0%	3.6%	5.7%	1.1%	4.7%
Nikkei		NKY	16,465.4	-1.3%	-2.0%	0.6%	7.5%	-3.9%	-6.7%	1.5%	-13.5%
Topix		TPX	1,330.8	-1.4%	-1.6%	3.3%	8.7%	-3.7%	-7.5%	-0.1%	-14.0%
日중소형		RNIRIS	657.5	0.1%	1.3%	6.1%	8.0%	-0.4%	0.0%	12.2%	-7.9%
인도		Sensex30	28,292.8	0.2%	-0.8%	1.8%	6.7%	13.3%	10.4%	6.3%	8.3%
중국	H-share	HSCEI	9,719.8	-0.3%	-1.3%	1.8%	13.9%	11.7%	2.2%	-8.2%	0.6%
중국	레드칩	HSCCI	3,933.0	0.2%	-0.6%	0.2%	13.4%	6.9%	0.3%	0.3%	-2.9%
중국	상해 A	상해 A 주식	3,127.6	-0.3%	-1.3%	-2.7%	3.2%	0.3%	-3.4%	27.3%	-15.6%
중국	선전 A	선전 A 주식	2,069.2	-0.2%	-1.4%	-2.2%	1.6%	4.9%	16.6%	50.9%	-14.3%
중국	MSCI CN	MSCN Free	661.3	0.0%	-0.2%	4.4%	20.5%	19.4%	13.9%	6.9%	10.8%
대만		TWSE	9,194.5	-	-0.4%	0.7%	8.1%	5.8%	13.1%	2.3%	10.3%
홍콩		HSI	23,619.7	0.2%	-0.2%	3.1%	17.1%	16.1%	11.5%	-0.2%	7.8%
말레이지아		KLCI	1,665.0	0.0%	0.4%	-1.1%	1.9%	-2.2%	3.1%	-9.5%	-1.6%
태국		SET	1,479.6	-0.7%	-0.5%	-4.5%	2.9%	6.5%	7.5%	-7.5%	14.9%
필리핀		PCOMP	7,587.0	0.4%	-1.2%	-3.3%	-1.0%	3.4%	9.7%	4.5%	9.1%
싱가폴		FSSTI	2,858.0	-0.1%	0.3%	0.0%	3.7%	1.0%	0.9%	-13.2%	-0.9%
인도네시아		JCI	5,425.3	0.1%	1.5%	-0.2%	11.1%	13.7%	28.9%	5.7%	18.1%
베트남		VNINDEX	686.7	0.3%	2.7%	2.8%	10.4%	19.3%	20.4%	13.5%	18.6%
호주		S&P/ASX200	5,412.4	0.1%	1.4%	-1.9%	6.1%	6.5%	7.3%	1.9%	2.2%
뉴질랜드		NZSE50	7,290.4	0.5%	0.1%	-1.4%	8.5%	9.4%	28.2%	38.8%	15.3%
지역 MSCI지수		아시아태평양	140.9	-0.8%	-0.3%	1.8%	12.3%	10.0%	12.6%	-0.8%	6.7%
		ex Japan	1,081.6	-0.1%	0.9%	1.6%	14.6%	13.8%	20.1%	0.7%	13.6%
		골드드래곤	270.1	0.0%	-0.1%	3.9%	18.3%	18.1%	17.6%	8.3%	14.1%











자료출처: Bloomberg

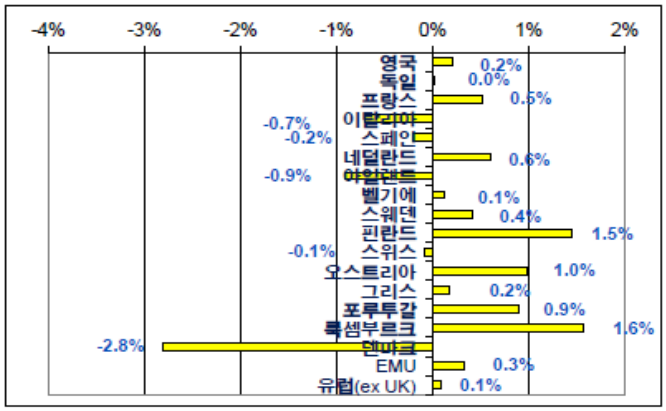
서유럽주식

기준일 2016-9-28

Schroders

국가명	지수명	종가	1일	1주	1월	3월	6월	1년	2년	YTD
영국	FTSE100	6,849.4	0.6%	0.2%	0.2%	11.5%	12.2%	14.9%	3.0%	9.7%
독일	DAX	10,438.3	0.7%	0.0%	-1.4%	10.5%	6.0%	10.1%	10.0%	-2.8%
프랑스	CAC40	4,432.5	0.8%	0.5%	-0.2%	8.4%	2.4%	1.7%	0.9%	-4.4%
이탈리아	FTSE All	17,866.6	0.6%	-0.7%	-3.3%	4.1%	-9.8%	-20.1%	-18.6%	-23.1%
스페인	IBEX35	8,740.4	0.6%	-0.2%	0.9%	11.6%	-0.6%	-7.0%	-19.5%	-8.4%
네덜란드	AEX	450.3	0.5%	0.6%	-0.6%	7.8%	2.9%	9.2%	7.6%	1.9%
아일랜드	ISEQ	6,039.4	0.8%	-0.9%	-2.1%	10.9%	-3.0%	-2.9%	25.1%	-11.1%
벨기에	BEL20	3,571.0	0.7%	0.1%	0.6%	11.3%	6.0%	7.6%	11.4%	-3.5%
스웨덴	SAX	514.0	0.3%	0.4%	1.3%	13.0%	8.0%	10.2%	15.3%	1.8%
핀란드	HEX25	3,472.3	0.5%	1.5%	1.5%	13.0%	10.3%	19.7%	18.3%	3.4%
스위스	SMI	8,220.1	0.5%	-0.1%	0.6%	5.7%	5.7%	-1.9%	-6.3%	-6.8%
오스트리아	ATX	2,386.2	0.6%	1.0%	3.2%	17.7%	7.4%	10.0%	7.7%	-0.4%
그리스	ASE	563.2	0.1%	0.2%	-0.4%	4.5%	1.1%	-14.0%	-48.2%	-10.8%
포루투갈	BVLX	2,458.9	0.9%	0.9%	-1.9%	6.9%	-0.3%	7.6%	-3.6%	-2.6%
룩셈부르크	LUXXX	1,582.3	0.7%	1.6%	0.1%	15.5%	11.3%	16.9%	3.0%	13.8%
덴마크	KFX	912.5	0.8%	-2.8%	-2.8%	-1.1%	-4.1%	-1.8%	19.1%	-10.0%
EMU	EMU	294.6	0.7%	0.3%	-0.3%	9.8%	3.8%	4.3%	5.5%	-3.8%
유럽(ex UK)	MS ex UK	127.6	0.7%	0.1%	-0.2%	8.1%	2.3%	1.3%	1.8%	-6.1%

1주



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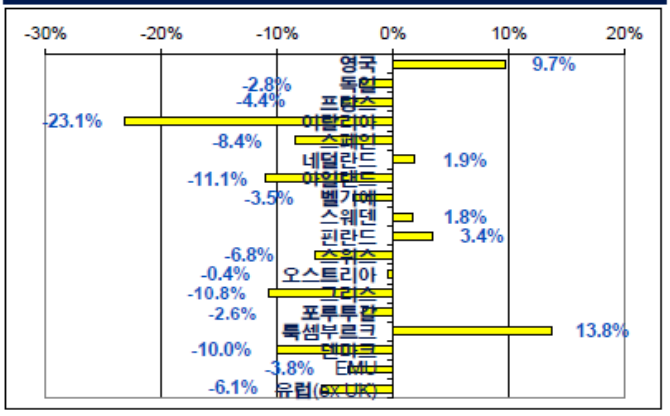
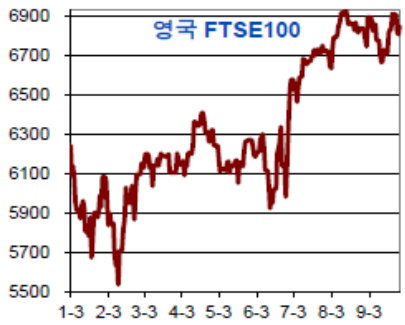
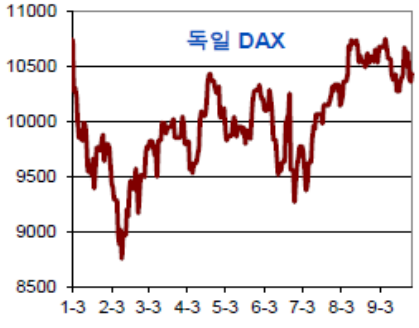
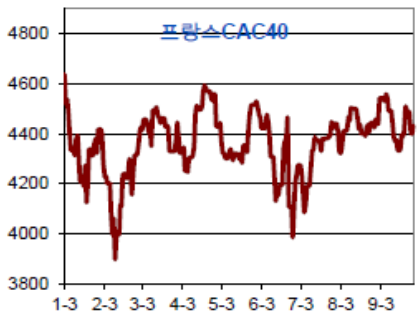








자료출처: Bloomberg

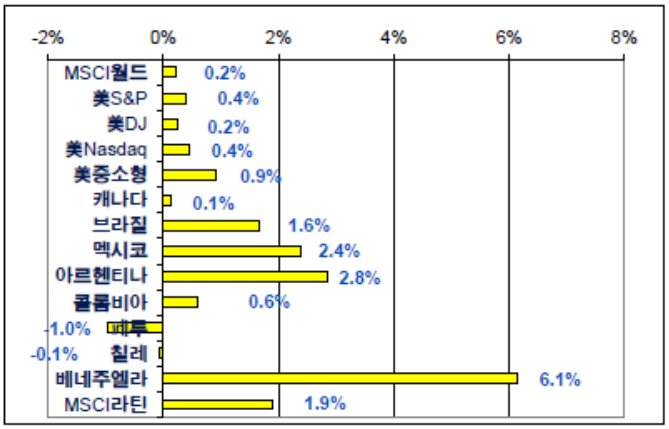
북미 & 중남미 주식

기준일 2016-9-28

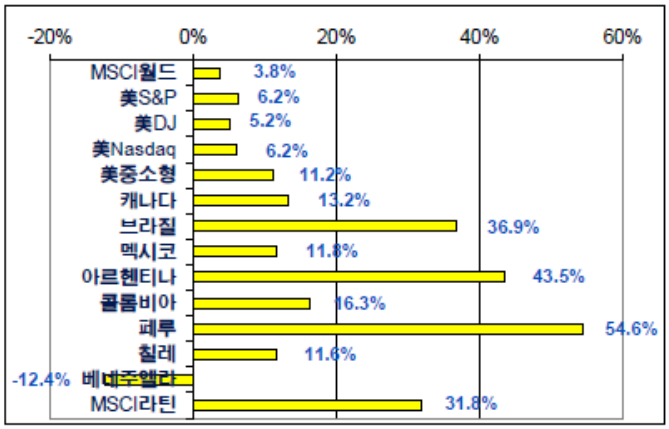
Schroders

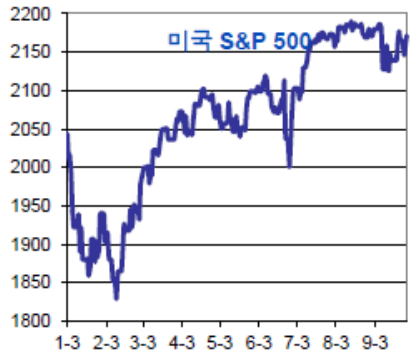
국가명	지수명	종가	1일	1주	1월	3월	6월	1년	2년	YTD
MSCI월드	WORLD	1,725.6	0.3%	0.2%	0.0%	7.9%	6.0%	10.6%	1.0%	3.8%
美S&P	S&P	2,171.4	0.5%	0.4%	0.1%	6.6%	6.6%	15.4%	9.5%	6.2%
美DJ	Dow Jones	18,339.2	0.6%	0.2%	-0.3%	5.3%	4.6%	14.6%	7.2%	5.2%
美Nasdaq	Nasdaq	5,318.5	0.2%	0.4%	1.9%	13.4%	11.6%	17.0%	17.9%	6.2%
美중소형	Rusell2500	1,776.7	0.8%	0.9%	1.0%	10.9%	13.5%	16.2%	13.8%	11.2%
캐나다	S&P TSX	14,731.4	1.2%	0.1%	0.6%	6.4%	10.0%	13.3%	-2.0%	13.2%
브라질	Bovespa	59,355.8	1.7%	1.6%	2.8%	18.7%	16.8%	35.0%	3.7%	36.9%
멕시코	Bolsa	48,046.6	0.7%	2.4%	1.4%	7.5%	5.3%	14.7%	7.0%	11.8%
아르헨티나	MERVAL	16,755.2	2.5%	2.8%	6.3%	18.5%	30.1%	78.0%	33.7%	43.5%
콜롬비아	IGBC	9,939.7	1.7%	0.6%	-1.7%	2.4%	3.1%	8.5%	-27.4%	16.3%
페루	Peru Lima	15,223.0	1.0%	-1.0%	0.0%	12.5%	29.8%	54.7%	-8.3%	54.6%
칠레	IGPA	20,260.6	0.3%	-0.1%	-1.3%	4.1%	6.4%	12.9%	4.8%	11.6%
베네주엘라	Caracas	12,784.7	-1.5%	6.1%	6.8%	-2.2%	-13.2%	5.3%	333.0%	-12.4%
MSCI라틴	Latin America	2,412.4	1.2%	1.9%	-1.1%	12.5%	13.5%	30.9%	-26.5%	31.8%

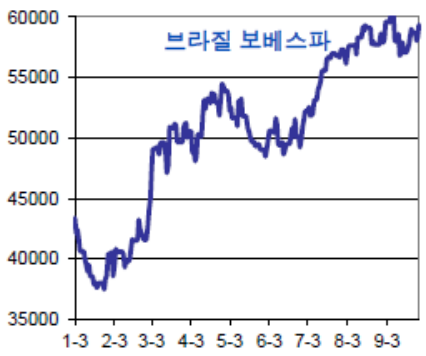
1주

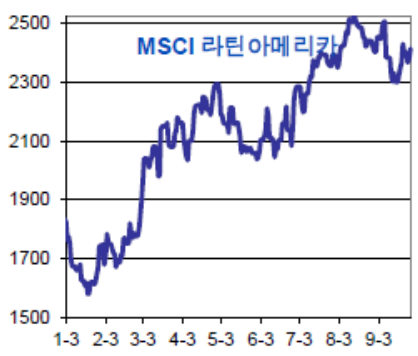


연초대비









자료출처: Bloomberg

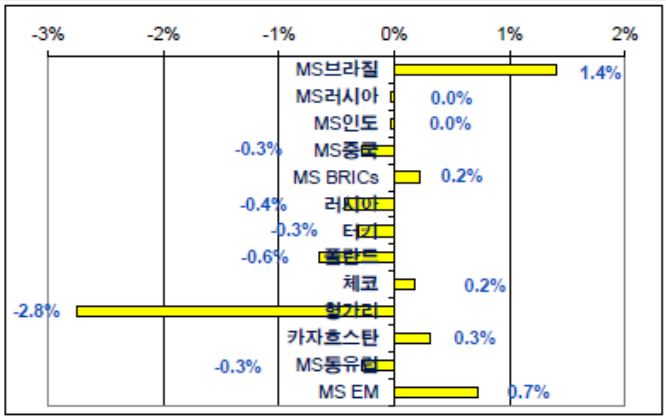
BRICs & 동유럽주식

기준일 2016-9-28

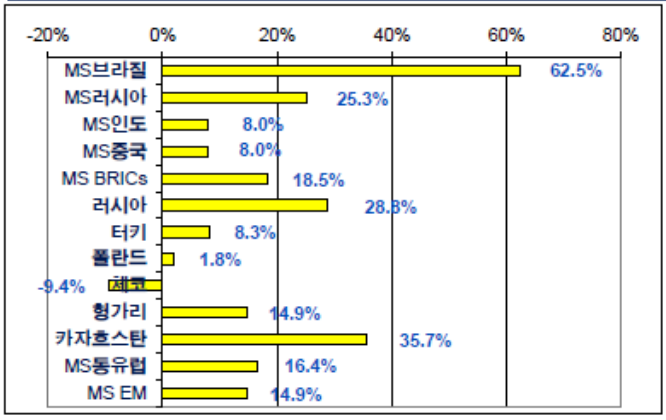
Schroders

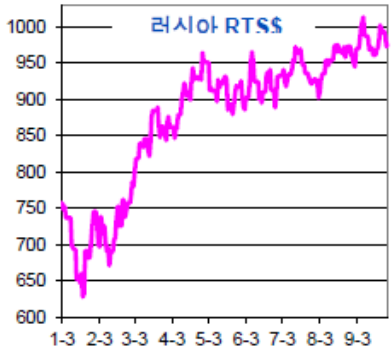
국가명	지수명	종가	1일	1주	1월	3월	6월	1년	2년	YTD
MS브라질	MXBR	1,683.5	1.4%	1.4%	1.4%	20.1%	29.0%	61.0%	-27.2%	62.5%
MS러시아	MXRU	507.0	0.1%	0.0%	0.2%	8.3%	11.9%	20.9%	-18.9%	25.3%
MS인도	MXIN	1,064.7	0.5%	0.0%	1.7%	7.7%	12.5%	10.1%	6.7%	8.0%
MS중국	MXCN	64.2	0.0%	-0.3%	4.1%	18.9%	16.4%	11.0%	1.2%	8.0%
MS BRICs	MSCI BRICs	474.5	0.3%	0.2%	3.3%	17.7%	19.6%	20.8%	-4.5%	18.5%
러시아	RTS$	975.3	0.2%	-0.4%	0.2%	7.7%	14.5%	25.7%	-15.6%	28.8%
터키	Istanbul	77,677.8	0.7%	-0.3%	0.7%	1.0%	-4.5%	6.0%	4.1%	8.3%
폴란드	Warsaw	47,317.7	0.1%	-0.6%	-0.3%	6.1%	-1.0%	-3.9%	-13.3%	1.8%
체코	Prague	866.3	-	0.2%	1.5%	7.4%	-2.5%	-10.0%	-11.6%	-9.4%
헝가리	Budapest	27,476.4	0.0%	-2.8%	-0.9%	4.8%	8.0%	32.9%	55.9%	14.9%
카자흐스탄	KZKAK	1,165.2	-0.3%	0.3%	5.3%	19.1%	15.8%	39.6%	-6.5%	35.7%
MS동유럽	MSCI EE	128.5	0.0%	-0.3%	-0.4%	7.4%	5.2%	10.0%	-23.4%	16.4%
MS EM	MXEF	912.2	0.1%	0.7%	1.2%	13.3%	12.2%	16.7%	-10.9%	14.9%

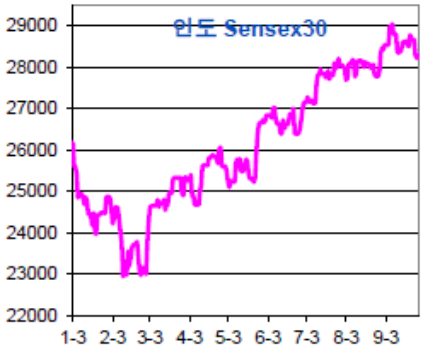
1주

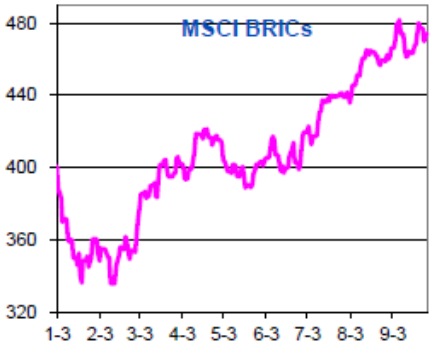


연초대비









자료출처: Bloomberg

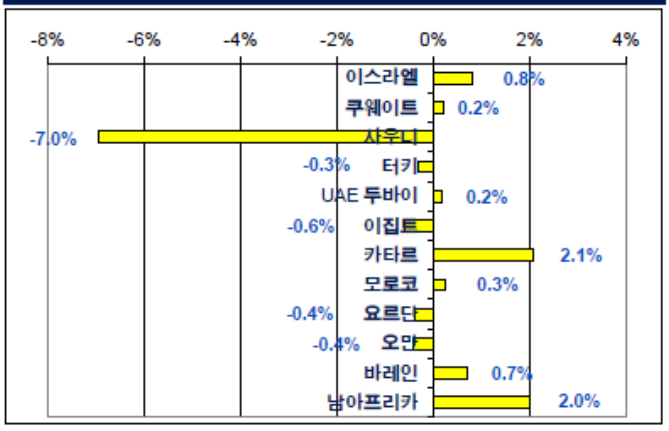
중동 & 아프리카 주식

기준일 2016-9-28

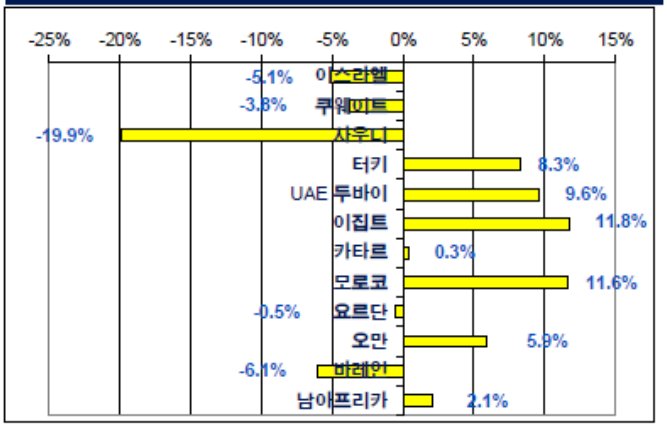
Schroders

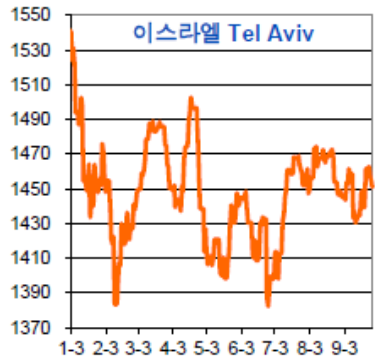
국가명	지수명	종가	1일	1주	1월	3월	6월	1년	2년	YTD
이스라엘	Tel Aviv	1,450.9	-0.2%	0.8%	0.2%	4.2%	-1.6%	-4.8%	-0.6%	-5.1%
쿠웨이트	Kuwait	5,402.4	-0.2%	0.2%	-0.2%	0.5%	2.9%	-6.3%	-29.5%	-3.8%
사우디	Tadawul	5,534.4	-3.4%	-7.0%	-8.8%	-14.6%	-11.7%	-25.6%	-48.2%	-19.9%
터키	Istanbul	77,677.8	0.7%	-0.3%	0.7%	1.0%	-4.5%	6.0%	4.1%	8.3%
UAE 두바이	Dubai	3,452.6	-0.4%	0.2%	-1.1%	5.1%	5.7%	-3.6%	-30.8%	9.6%
이집트	HERMES	704.8	-0.5%	-0.6%	-1.9%	10.8%	3.4%	7.2%	-23.4%	11.8%
카타르	DSM 20	10,465.4	-0.1%	2.1%	-6.5%	6.1%	3.2%	-8.5%	-24.4%	0.3%
모로코	Casablanca	21,214.3	-0.2%	0.3%	0.5%	4.9%	4.9%	8.6%	1.9%	11.6%
요르단	ASE	2,125.3	0.0%	-0.4%	1.9%	1.8%	-1.5%	2.6%	0.2%	-0.5%
오만	Muscat	5,726.2	-0.4%	-0.4%	-1.4%	-0.6%	3.2%	-0.7%	-23.2%	5.9%
바레인	Bahrain	1,141.9	0.2%	0.7%	0.2%	2.5%	-0.9%	-10.6%	-22.6%	-6.1%
남아프리카	FTSE/JSE	51,773.5	1.7%	2.0%	-3.2%	1.2%	-1.1%	4.6%	4.2%	2.1%

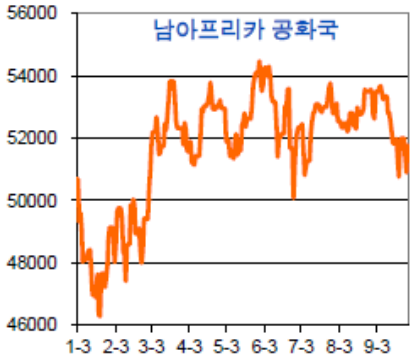
1주

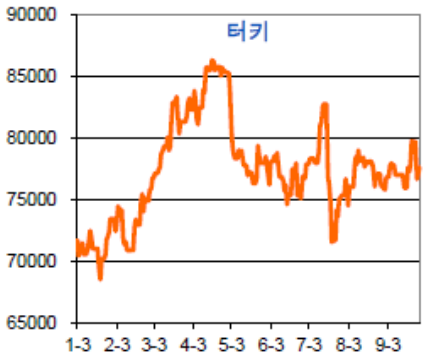


연초대비









자료출처: Bloomberg

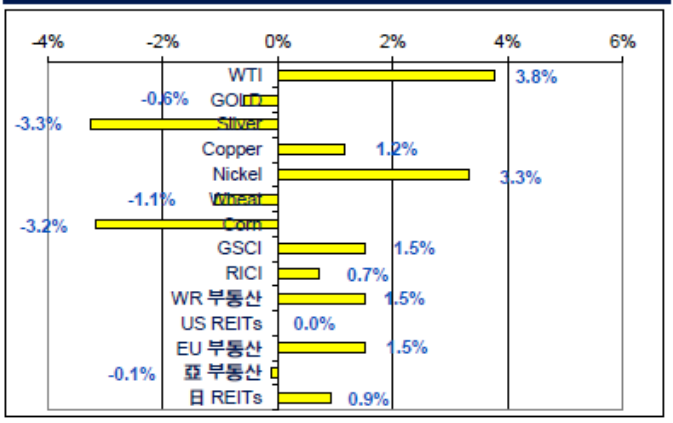
원자재 & 부동산

기준일 2016-9-28

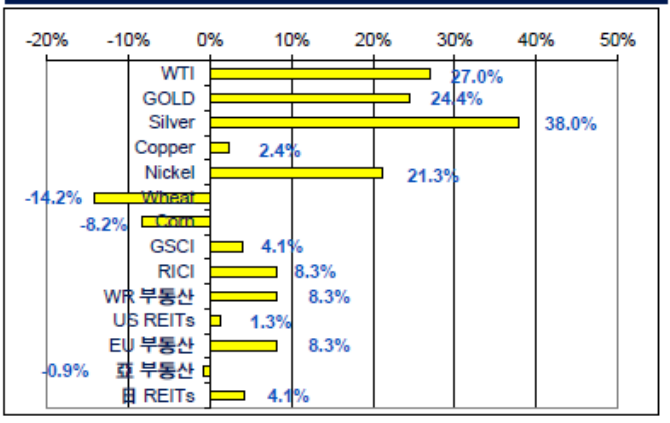
Schroders

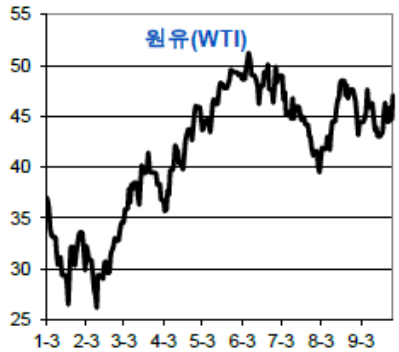
품목	종가	변동폭	1일	1주	1월	3월	6월	1년	2년	YTD
WTI	47.1	2.4	5.3%	3.8%	-1.2%	-1.7%	19.4%	5.9%	-49.7%	27.0%
GOLD	1,319.4	-6.6	-0.5%	-0.6%	-0.2%	0.3%	8.1%	16.6%	8.7%	24.4%
Silver	19.0	-0.0	-0.2%	-3.3%	2.1%	6.7%	25.3%	31.0%	9.0%	38.0%
Copper	4,818.0	31.0	0.6%	1.2%	4.4%	0.0%	-2.6%	-3.0%	-28.3%	2.4%
Nickel	10,695.0	65.0	0.6%	3.3%	9.0%	14.5%	23.6%	8.3%	-37.0%	21.3%
Wheat	403.3	-0.8	-0.2%	-1.1%	5.1%	-9.1%	-14.4%	-20.2%	-15.0%	-14.2%
Corn	329.3	-2.5	-0.8%	-3.2%	4.1%	-14.5%	-11.1%	-14.9%	1.9%	-8.2%
GSCI	2,258.9	61.6	2.8%	1.5%	-1.3%	-4.8%	5.3%	-12.4%	-50.2%	4.1%
RICI	2,200.4	35.5	1.6%	0.7%	-0.4%	-1.8%	8.4%	-3.1%	-33.4%	8.3%
WR 부동산	205.6	0.1	0.1%	1.5%	0.0%	3.7%	6.0%	13.9%	11.2%	8.3%
US REITs	196.1	-0.6	-0.3%	0.0%	1.2%	10.2%	7.3%	9.1%	7.0%	1.3%
EU 부동산	205.6	0.1	0.1%	1.5%	0.0%	3.7%	6.0%	13.9%	11.2%	8.3%
亞 부동산	233.6	-0.9	-0.4%	-0.1%	1.7%	11.4%	8.0%	11.4%	11.0%	-0.9%
日 REITs	1,819.75	-3.1	-0.2%	0.9%	-0.9%	1.1%	-3.9%	7.7%	10.6%	4.1%

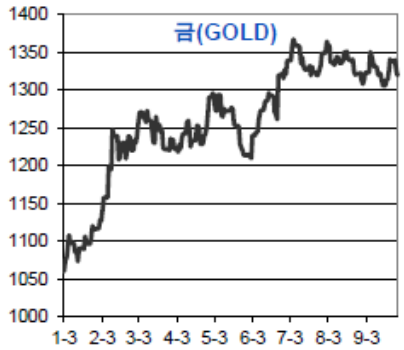
1주

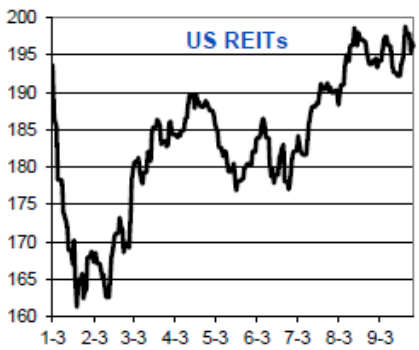


연초대비









자료출처: Bloomberg

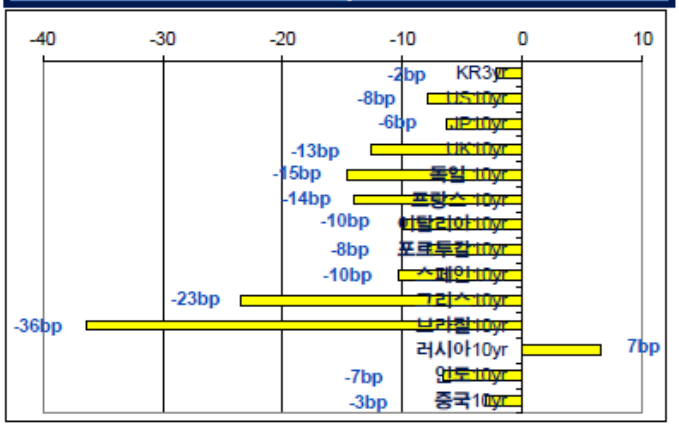
채 권

기준일 2016-9-28

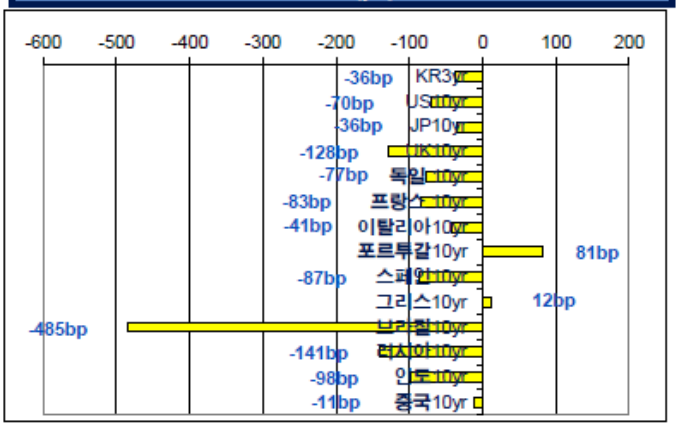
Schroders

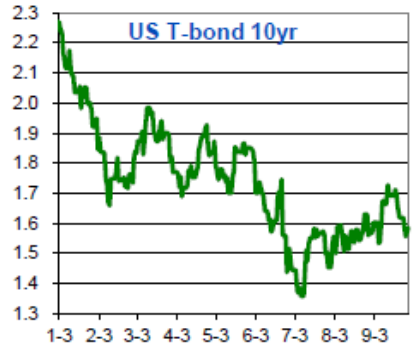
항목	금리	변동분	1일	1주	1월	3월	6월	1년	2년	YTD
KR3yr	1.30%	-0.007	-1bp	-2bp	6bp	5bp	-18bp	-31bp	-102bp	-36bp
US10yr	1.57%	0.015	2bp	-8bp	-6bp	11bp	-31bp	-52bp	-96bp	-70bp
JP10yr	-0.09%	-0.016	-2bp	-6bp	-2bp	13bp	-1bp	-45bp	-61bp	-36bp
UK10yr	0.68%	0.007	1bp	-13bp	12bp	-28bp	-77bp	-109bp	-179bp	-128bp
독일 10yr	-0.15%	-0.006	-1bp	-15bp	-7bp	-3bp	-33bp	-73bp	-112bp	-77bp
프랑스 10yr	0.16%	-0.006	-1bp	-14bp	-1bp	-8bp	-38bp	-84bp	-115bp	-83bp
이탈리아10yr	1.18%	-0.026	-3bp	-10bp	5bp	-22bp	-12bp	-56bp	-120bp	-41bp
포르투갈10yr	3.32%	-0.079	-8bp	-8bp	29bp	19bp	36bp	81bp	23bp	81bp
스페인10yr	0.89%	-0.002	0bp	-10bp	-5bp	-42bp	-63bp	-103bp	-130bp	-87bp
그리스10yr	8.19%	-0.115	-12bp	-23bp	24bp	-31bp	-44bp	8bp	211bp	12bp
브라질10yr	11.66%	-0.083	-8bp	-36bp	-50bp	-38bp	-222bp	-469bp	-20bp	-485bp
러시아10yr	8.21%	-0.020	-2bp	7bp	-4bp	-24bp	-98bp	-285bp	-109bp	-141bp
인도10yr	6.78%	-0.010	-1bp	-7bp	-35bp	-67bp	-72bp	-94bp	-166bp	-98bp
중국10yr	2.72%	0.006	1bp	-3bp	-1bp	-13bp	-14bp	-57bp	-129bp	-11bp
US IG spr	135bp	0.000	-	1bp	5bp	-16bp	-23bp	-24bp	42bp	-24bp
US HY spr	429bp	0.000	-	3bp	10bp	-102bp	-164bp	-72bp	125bp	-151bp

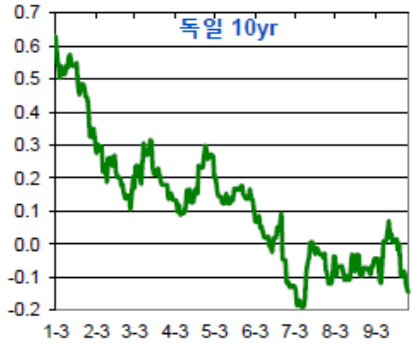
1주

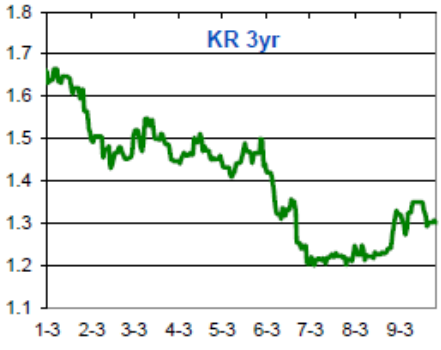


연초대비









자료출처: Bloomberg

통 화

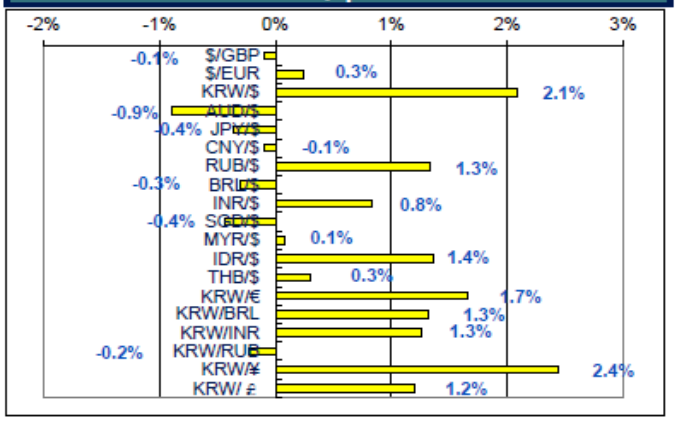
기준일 2016-9-28

Schroders

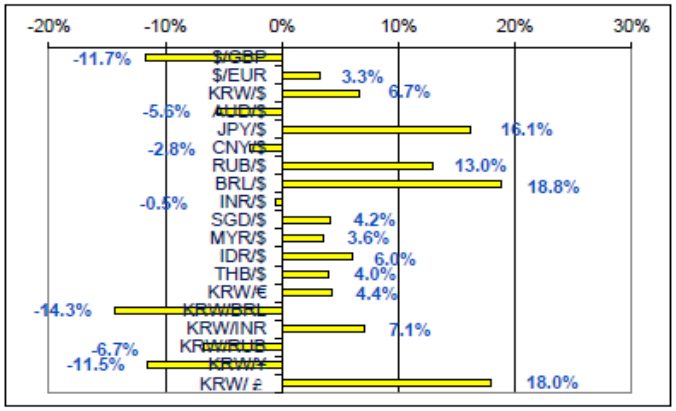
품목	종가	변동분	1일	1주	1월	3월	6월	1년	2년	YTD
$/GBP	1.30	-0.0	0.0%	-0.1%	-0.9%	-2.4%	-8.7%	-14.2%	-19.9%	-11.7%
$/EUR	1.12	0.0	0.0%	0.3%	0.2%	1.4%	0.2%	-0.2%	-11.6%	3.3%
KRW/$	1,096.9	-0.1	0.0%	2.1%	1.5%	6.3%	5.9%	8.2%	-5.0%	6.7%
AUD/$	0.8	0.0	-0.3%	-0.9%	-1.7%	-4.1%	-1.9%	-10.1%	12.2%	-5.6%
JPY/$	100.7	0.3	-0.3%	-0.4%	1.1%	2.0%	11.3%	16.0%	7.9%	16.1%
CNY/$	6.7	0.0	-0.1%	-0.1%	-0.1%	-0.4%	-2.6%	-4.8%	-9.0%	-2.8%
RUB/$	63.1	-0.6	0.9%	1.3%	2.3%	2.0%	8.0%	4.8%	-61.0%	13.0%
BRL/$	3.2	-0.0	0.5%	-0.3%	1.5%	2.6%	11.3%	21.7%	-32.9%	18.8%
INR/$	66.5	-0.0	0.0%	0.8%	0.9%	2.2%	0.2%	-0.6%	-8.7%	-0.5%
SGD/$	1.4	-0.0	0.0%	-0.4%	0.0%	-0.4%	0.8%	4.9%	-6.6%	4.2%
MYR/$	4.1	0.0	-0.3%	0.1%	-3.0%	-1.5%	-3.1%	6.4%	-26.9%	3.6%
IDR/$	12,957.0	2.0	0.0%	1.4%	1.9%	1.8%	2.9%	11.7%	-7.5%	6.0%
THB/$	34.6	-0.0	0.1%	0.3%	0.2%	1.8%	2.1%	5.0%	-6.9%	4.0%
KRW/€	1,228.1	-6.0	0.5%	1.7%	2.3%	5.2%	5.7%	8.1%	7.7%	4.4%
KRW/BRL	339.5	0.3	-0.1%	1.3%	1.2%	4.0%	-5.6%	-16.6%	21.8%	-14.3%
KRW/INR	16.5	0.0	0.0%	1.3%	0.6%	4.2%	5.8%	8.8%	3.4%	7.1%
KRW/RUB	17.3	0.1	-0.6%	-0.2%	0.2%	4.7%	-1.9%	4.1%	35.4%	-6.7%
KRW/¥	10.9	-0.0	0.3%	2.4%	0.4%	4.4%	-6.0%	-9.3%	-14.0%	-11.5%
KRW/£	1,421.6	-6.9	0.5%	1.2%	3.6%	8.7%	14.5%	21.7%	16.6%	18.0%

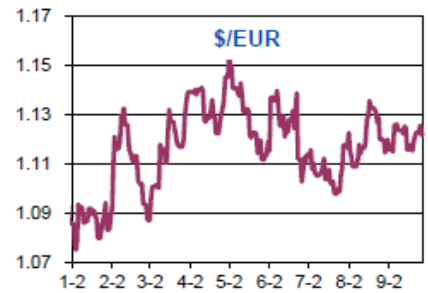
* 상기 표의 환율관련 기간별 상승률은 분자 통화의 분모 통화에 대한 평가절상폭을 나타냄($/EUR,$/GBP는 반대)

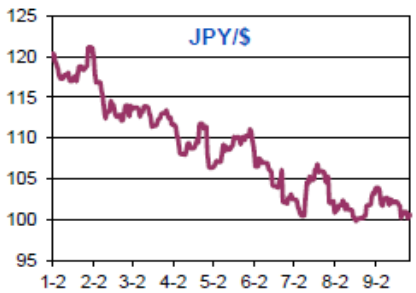
1주

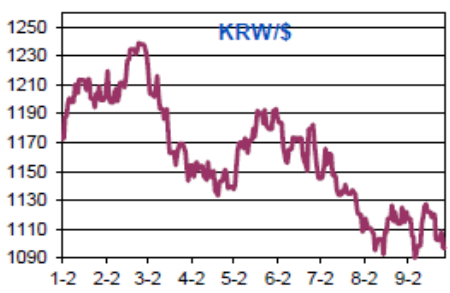


연초대비









자료출처: Bloomberg

Schroders

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