

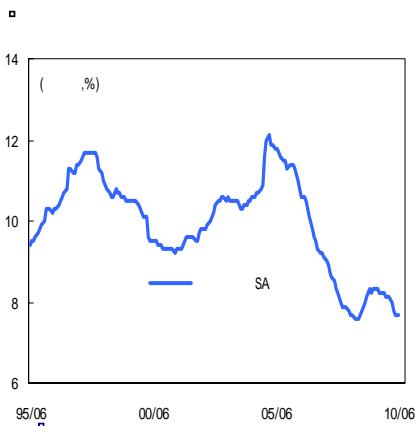
Global Market Daily

美

Economist
82-2-3707-3621
hosang.lim@samsung.com

가	가	
S&P 500	1106.13	-0.69%
NASDAQ	2264.56	-1.04%
50	2766.11	-0.12%
225	9753.27	2.70%
A	2633.66	2.26%

10Y	(%)	(bp)
	2.99	-6.4
	2.75	-2.1
	1.095	3.5



가		
	46	46.4
	450	448.7
7	99.1	98.7
7	7.6%	7.7%
7	가	7.0%

가		
7	290	
	3/5/10	95
	8/5	40

가					
	6	-1.0%	1.0%	-1.1%	-0.8%
		-4.4%	-	7.6%	
	7	가	1.2%	1.1%	0.8%
	7		48.1	-	47.4

가 가

[베이스북] 전체적으로 볼 때, 경제활동은 지난 조사 이후 완만한 확장 움직임이 지속되고 있음. 한편 12개 지역 가운데 2개 지역은 경제활동의 확장세가 정체, **다른 2개 지역은 확장 속도 둔화**가 나타나고 있다고 지적.

주택시장은 4월말로 세계 혜택이 중단된 영향으로 정체되는 상황임을 지적. **특히 상업용 부동산의 경우 여전히 취약한 상태라고 언급.** 이 부분은 지난 연간 전망 및 각종 세미나 자료를 통해 서브프라임 위기 직전까지 급증한 상업용 부동산 담보대출들이 **내년부터 만기가 돌아오는 관계로 미국 경기회복에 일정 부분 리스크 요인**으로 작용할 수 있음을 지적해 온 사항임. 물론 절대액 규모는 서브프라임에 미치지 못하지만.

그 외 제조업 및 개인소비의 경우도 대부분의 지역에서 확장 국면이 완만하게 지속되고 있으나, 일부 지역에서는 정체되거나 둔화되는 모습을 지적함.

최근 공개된 FOMC 의사록 및 버냉키 의장의 상하 양원 증언 내용과 일치하는 모습으로 미국의 저금리 기조 유지 필요성을 다시금 시사함.

[주식] 美 증시는 1) 내구재 수주가 민간항공기 수주의 감소 영향으로 예상 외로 전월 대비 1% 감소하고, 2) 베이스북에서의 경기둔화 언급이 이어지며 주가 조정이 이어짐. 항공기 제작업체 보잉은 2분기 매출 시장 예상치를 하회로, KODAK의 경우는 2분기 적자 폭이 시장 예상치를 상회하며 하락 마감.

[기술적 포인트] 그 동안 언급해온 것처럼 나스닥 지수 기준 2300 포인트 돌파 전까지는 여전히 저가 매수 기조로 접근 필요. 물론 돌파 시는 추격 매수 전환.

[국채] 미국 국채 금리는 상기 경제지표 둔화 요인들로 인해 안전자산 선호가 강화되며 금리 하락 마감. 이날 실시된 국채 5년물 입찰에서는 발행액이 370억 달러로 최근 1년내 최저금액을 기록하며 수급 부담을 완화하며, 국채 5년물 금리는 전일 대비 9bp 하락 마감. 다만 국채 2년물이 5bp, 5년물 9bp, 10년물이 6bp 하락한 반면, 30년물은 1bp 하락에 그침.

(2)

가					
美	/	/	,	/BT/	,日
	/SONY/	/NTT			

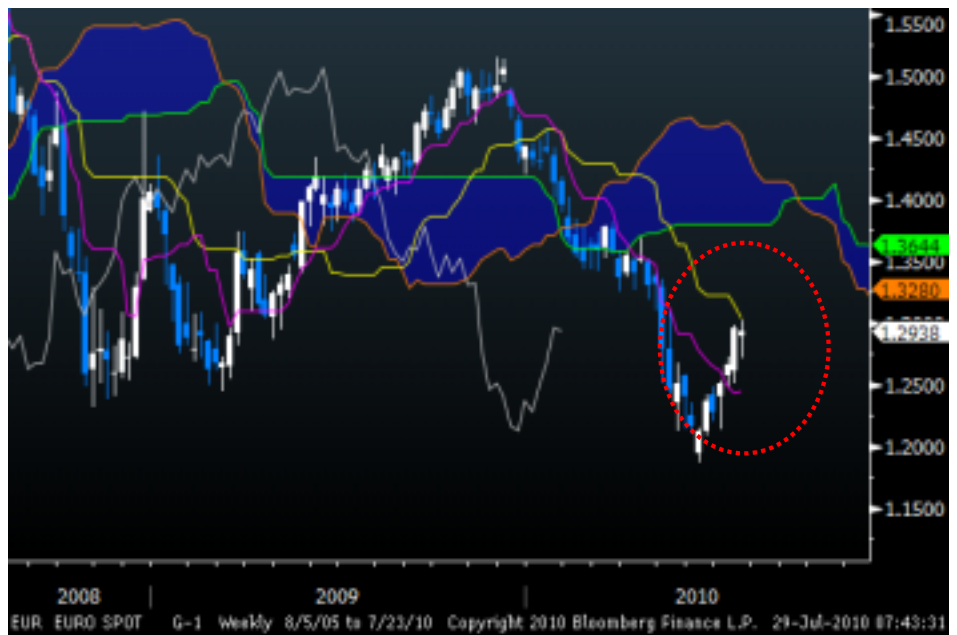
Global Market *Daily*

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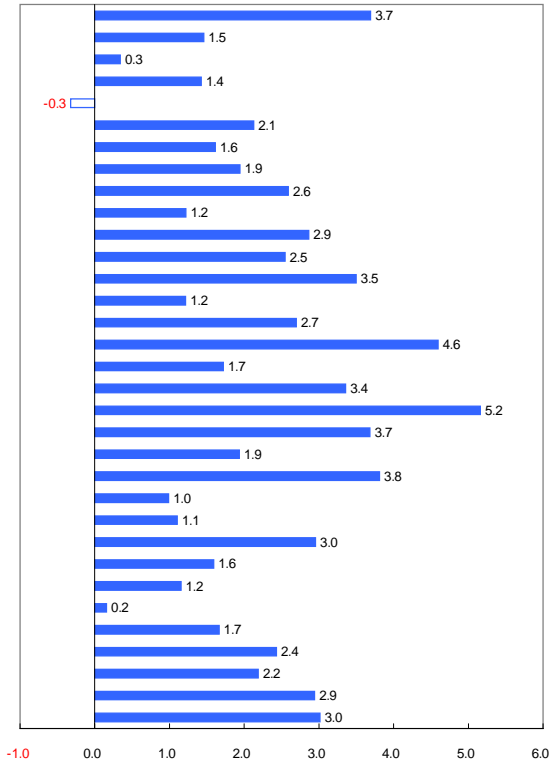
[] / 가 /

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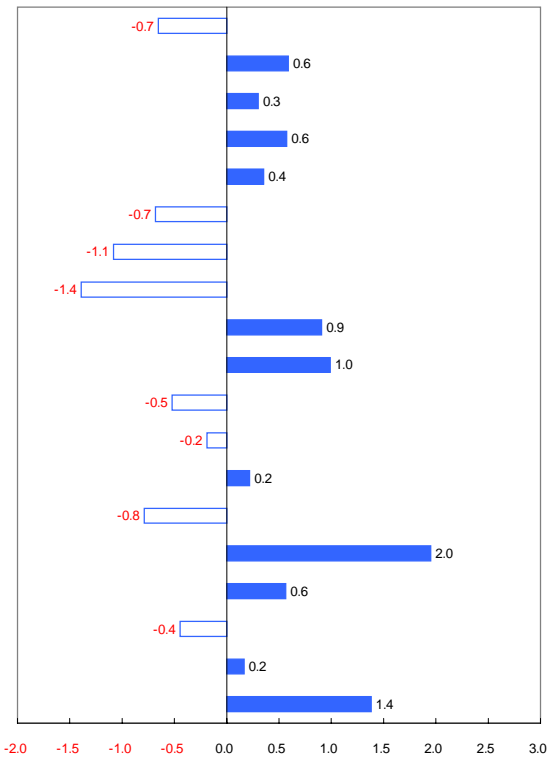


TOPIX (%)



Company	가	(%)
UFJ	3,080	1.3
UFJ	433	3.6
UFJ	143	2.9
UFJ	2,679	3.6
UFJ	3,715	5.7
UFJ	2,608	2.7
UFJ	3,980	0.6
UFJ	2,708	2.2
NTT	3,675	1.4
NTT	2,416	0.4
NTT	1,167	2.5
NTT	1,270	3.5
NTT	492	3.6
NTT	306	3.7
NNT	138,700	1.3
NNT	1,916	3.2
NNT	25,100	3.2
JFE	2,805	5.6
JR	5,900	1.7
JR	355	3.8
JR	463	2.2
JR	978	1.6
JR	2,625	2.5
JR	4,535	2.6
JR	7,760	4.7
JR	4,790	2.6
JR	601	2.4
JR	1,169	2.2
NEC	244	2.5
TDK	5,280	4.1
TDK	1,553	3.2
Advanced Material	2,007	5.7
Advanced Material	236	2.2
Advanced Material	34,100	-3.0
Advanced Material	386	2.4
Advanced Material	2,599	5.0

KOSPI (%)



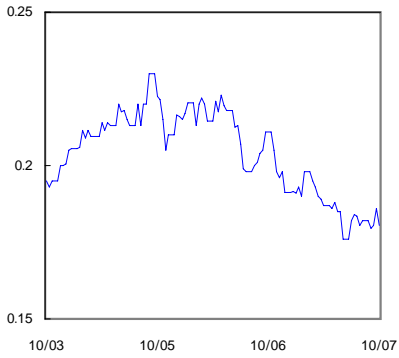
Company	가	(%)
SK	837,000	0.4
SK	513,000	0.2
SK	33,550	1.1
SK	48,900	1.3
SK	15,100	-0.3
SK	166,000	-0.6
SK	271,000	-1.5
SK	23,100	-1.7
SK	145,000	1.0
SK	93,700	0.8
SK	42,350	-0.1
SK	553,000	1.8
SK	35,350	1.1
SK	12,250	-0.4
KT&G	59,000	-0.8
LG	101,000	-2.9
LG	10,050	-2.0
LG	197,500	-1.0
LG	75,600	-0.8
S-Oil	56,500	0.2
S-Oil	16,050	1.9
S-Oil	20,300	-0.2
S-Oil	204,000	0.2
S-Oil	37,650	1.2
S-Oil	24,650	-1.2
S-Oil	57,700	-0.3
S-Oil	61,900	-0.8
S-Oil	368,000	6.7
GS	79,100	1.5
GS	20,050	-4.3
SK	10,400	-0.5
SK	30,500	-1.3
SK	28,050	1.8
SK	33,800	2.6

Global OIS (Overnight Index Swap) Rate Chart

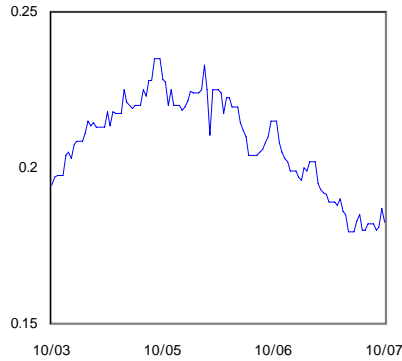
2010. 7. 29(Thu)

US OIS

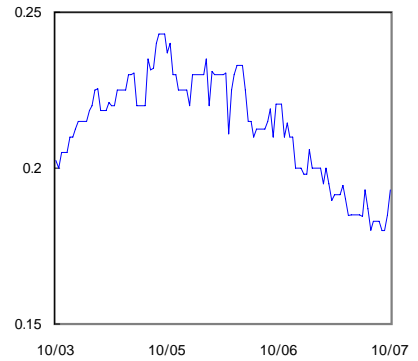
1 MONTH



2 MONTH

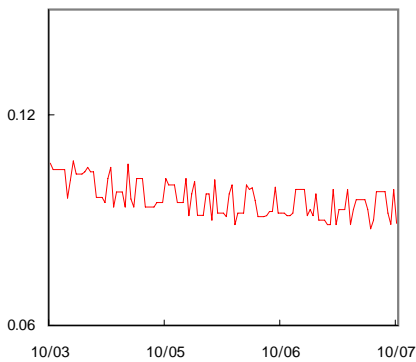


3 MONTH

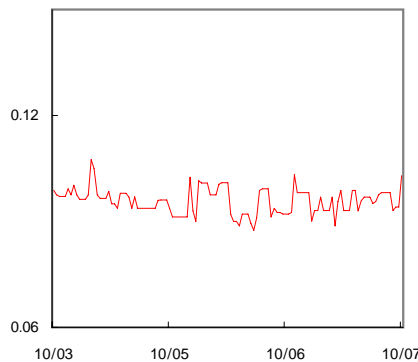


Japan OIS

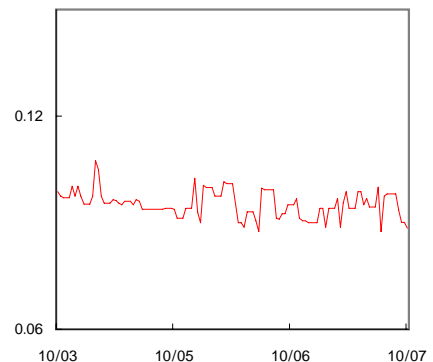
1 MONTH



2 MONTH

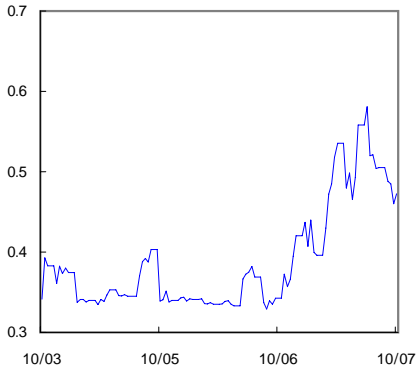


3 MONTH

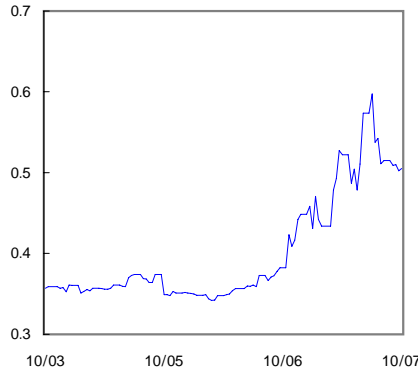


Eurozone OIS

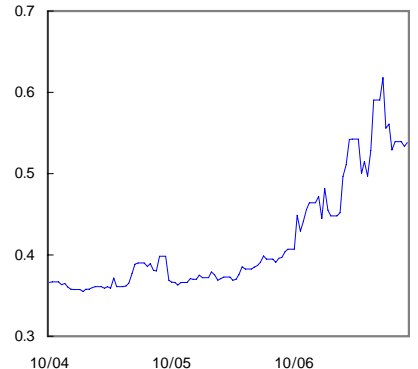
1 Week



1 Month



2 Month

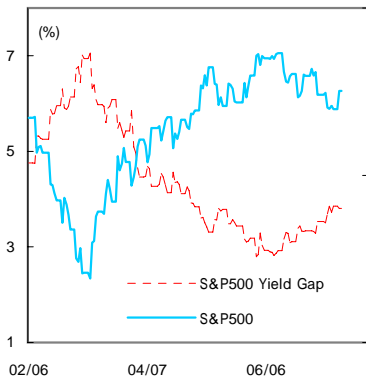


Global Daily Chartbook 1

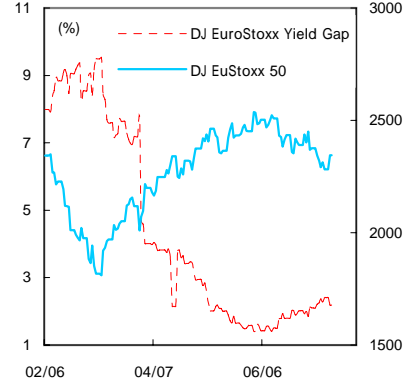
2010. 7. 29(Thu)

Global Equity Index and Yield Gap Daily

US

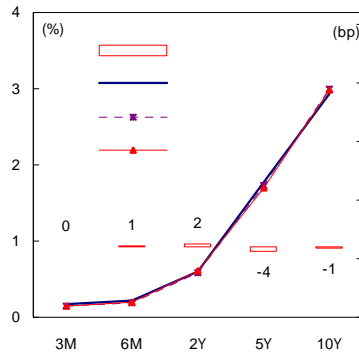


EUROPE

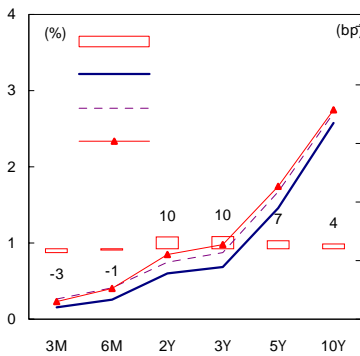


Global Yield Curve

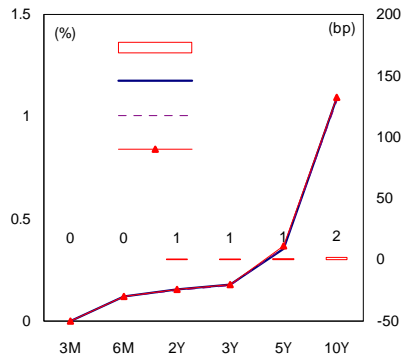
US



Germany

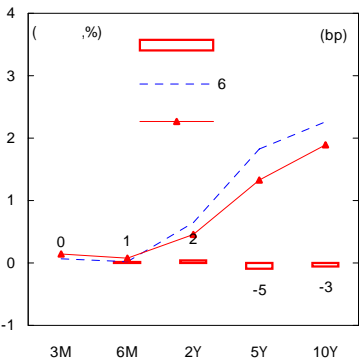


Japan

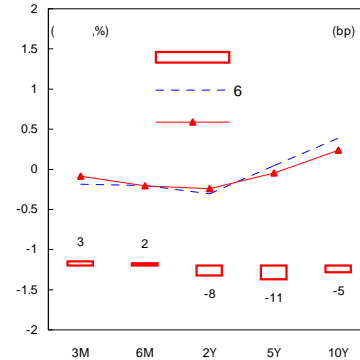


Global Yield Spread

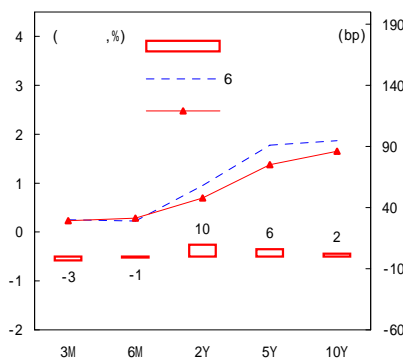
US/Japan



US/Germany



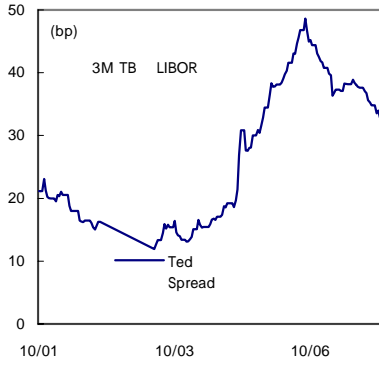
Germany/Japan



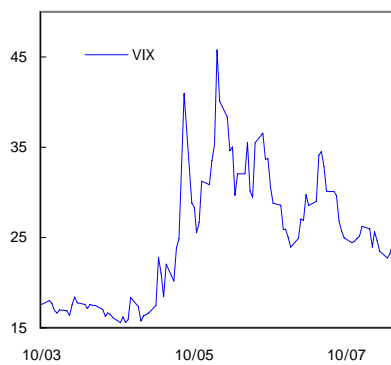
Global Daily Chartbook 2

2010. 7. 29(Thu)

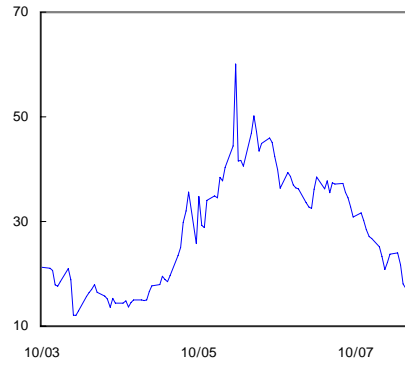
TED Spread



VIX Index

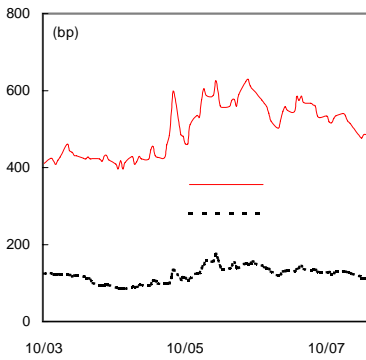


US 2Y Swap Spread

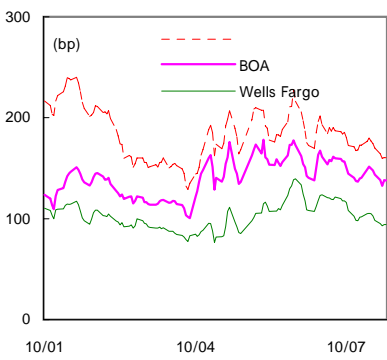
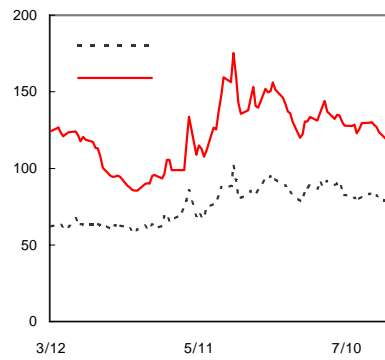


Global Credit Default Swap Index 1

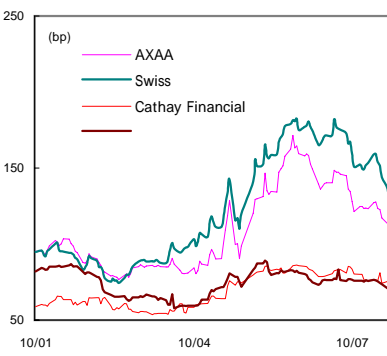
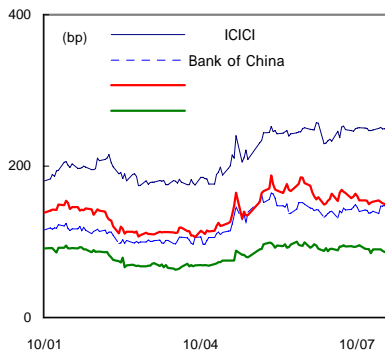
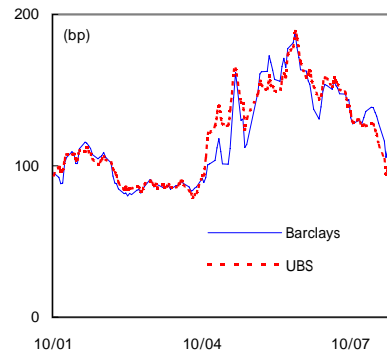
Europe/Japan



Asia



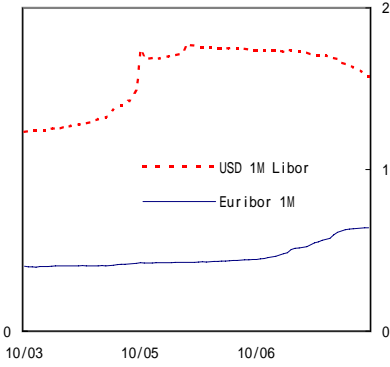
Global Credit Default Swap Index 2



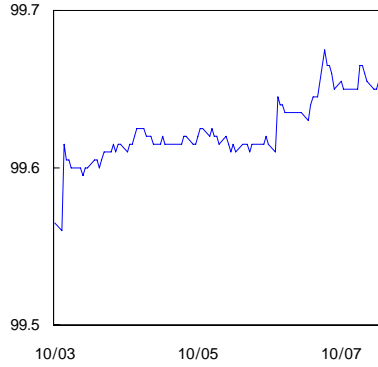
Global Daily Chartbook 3

2010. 7. 29(Thu)

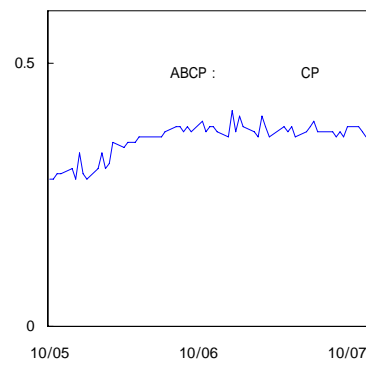
1 Month Libor



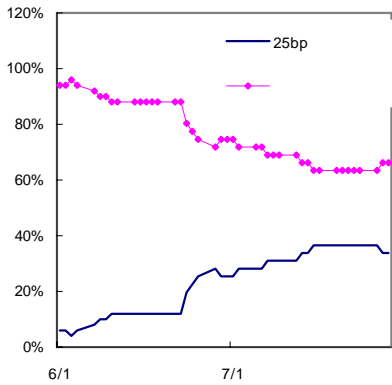
EUROYEN 3M



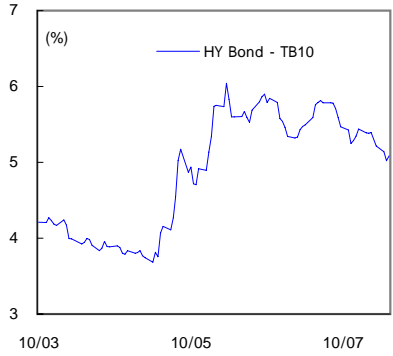
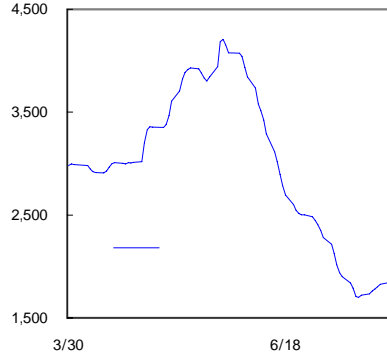
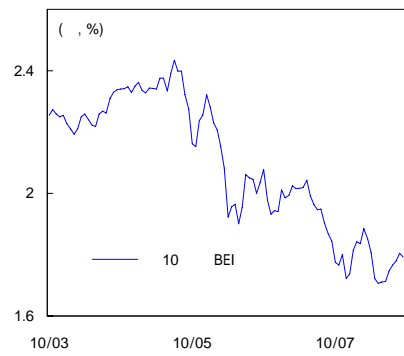
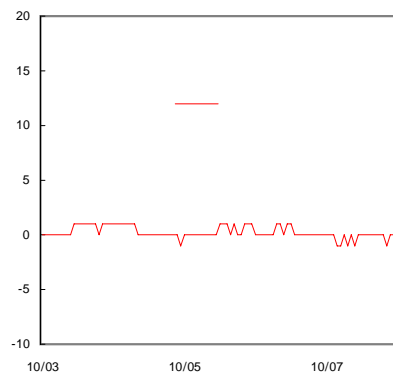
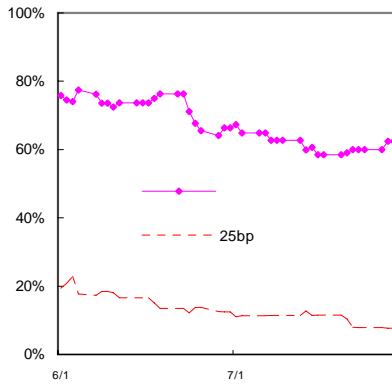
US ABCP



FFR (8/10)



FFR (11/3)

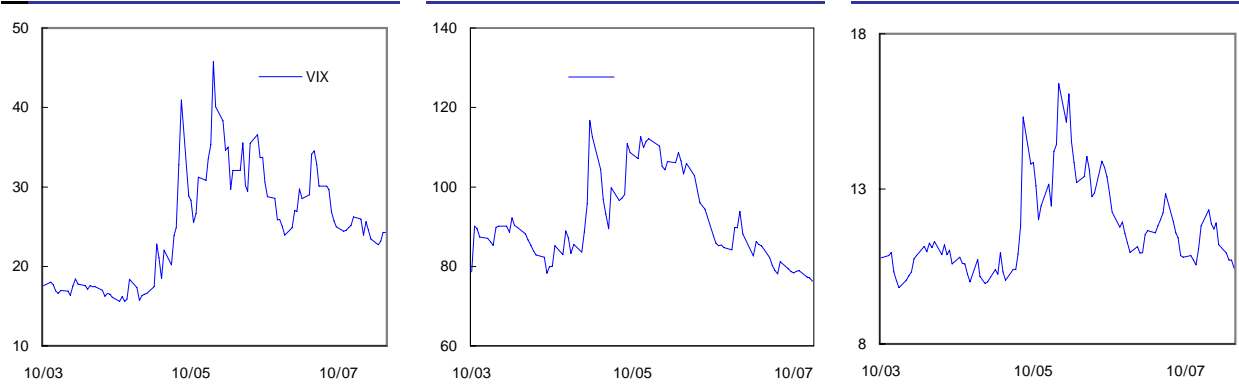


Global Daily Chartbook 4

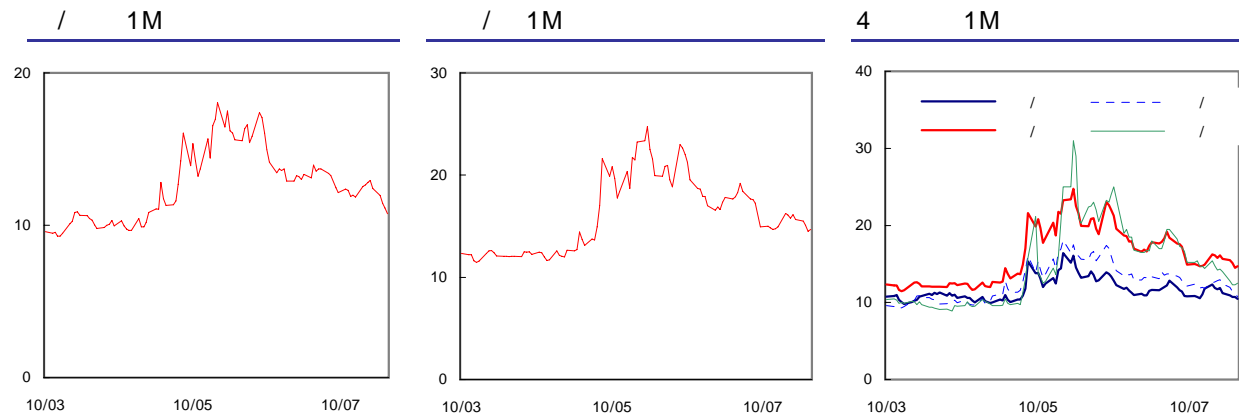
2010. 7. 29(Thu)

Global Volatility Index 1

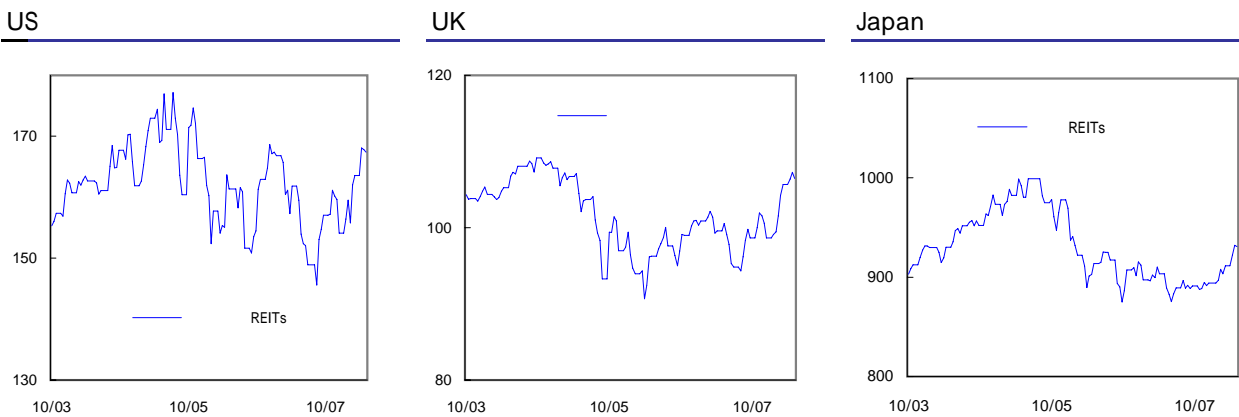
VIX Index



Global Volatility Index 2



Global REITs Index

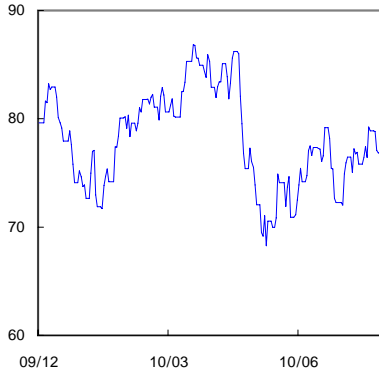


Global Daily Chartbook 5

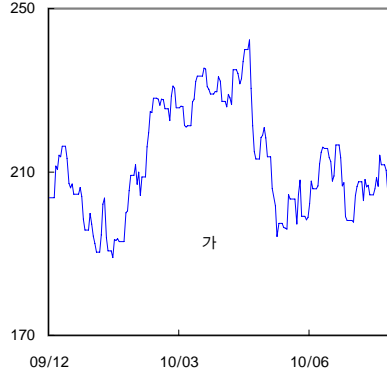
2010. 7. 29(Thu)

Global Commodity Index : Energy

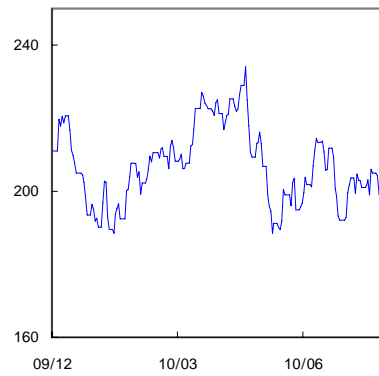
Crude Oil



Gasoline

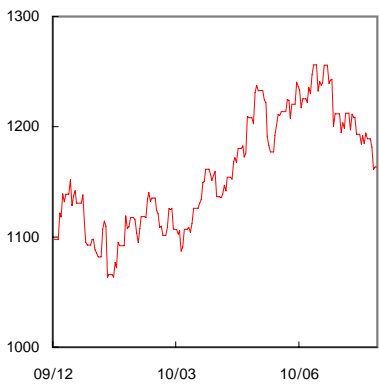


Heating Oil ()

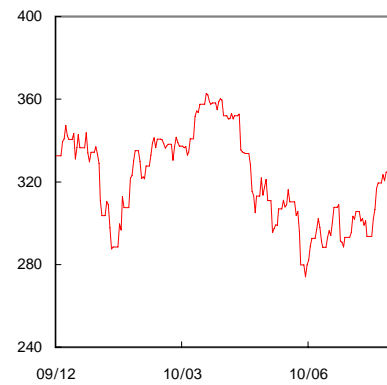


Global Commodity Index : Metals

Gold

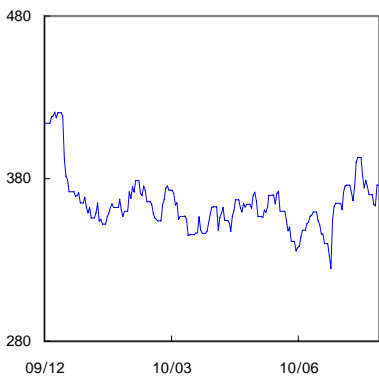


Copper ()

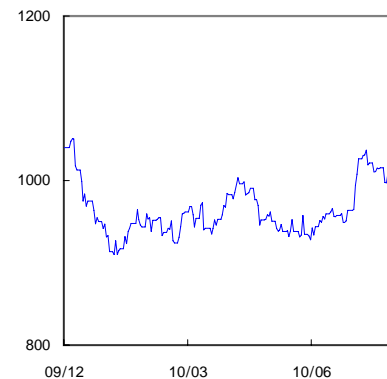


Global Commodity Index : Grains

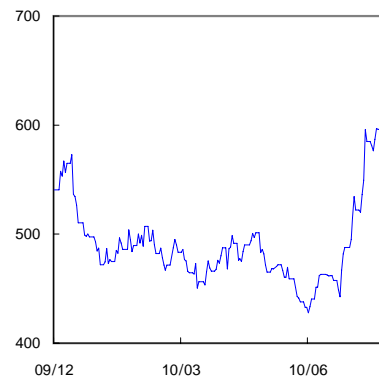
Corn ()



Soybean ()



Wheat ()

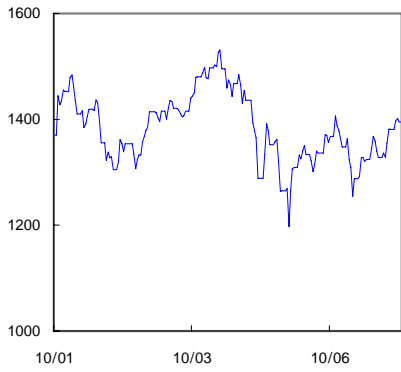


Global Daily Chartbook 6

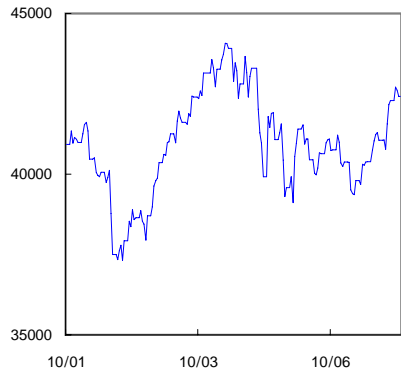
2010. 7. 29(Thu)

Emerging Europe Equity Index

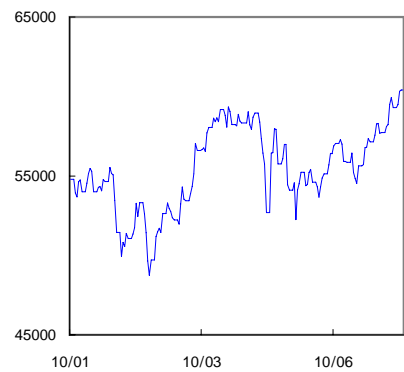
Russia MICEX



Poland WIG

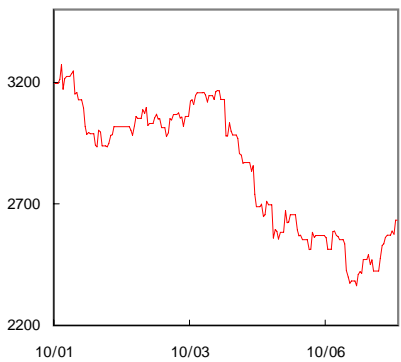


Turkey XU100

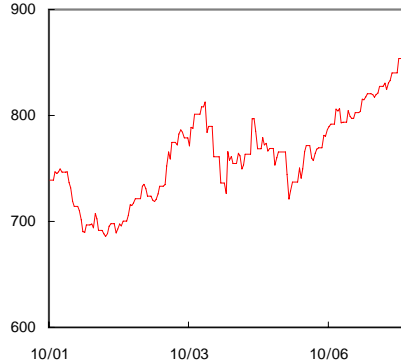


Emerging Asia Equity Index

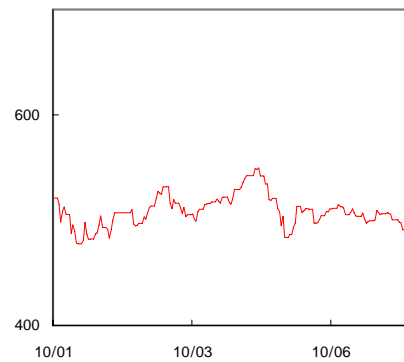
China



Thai SET

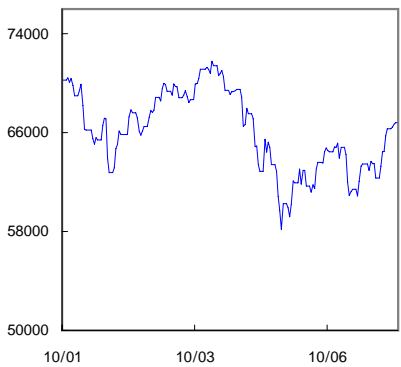


Vietnam VN

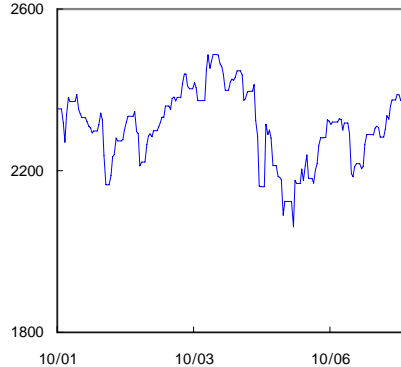


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