

週一亞洲股市下跌，油價下跌，因隨著中美對冠狀病毒起源問題日益加劇，打擊了投資者對世界各地開始逐步放寬限制的樂觀情緒。然而，由於日本和中國的公眾假期，成交量有所減少。韓國的KOSPI下跌，加上與北韓的緊張局勢正拖累著香港的恒生指數從連續兩日假期後下跌3.5%，而澳洲ASX 200上升0.5%。

週一歐洲股市下跌，因華盛頓威脅要因冠狀病毒疫情將對華徵收關稅後，五一假期後投資者重新應對中美緊張局勢。美國國務卿邁克·蓬佩奧 (Mike Pompeo) 週日表示，“大量證據”表明該病毒是從中國實驗室中產生，加劇了投資者對美國向中國徵收新關稅以報復疫情威脅的憂慮。歐洲石油股表現最差，跟隨油價下跌。

由於大型科技/互聯網公司的升勢以及油價上升蓋過美中緊張局勢和沃倫·巴菲特 (Warren Buffett) 的伯克希爾·哈撒韋公司 (Berkshire Hathaway) 週年大會的悲觀情緒的憂慮，美國市場週一上升。指數低開，但整個下午上升。增長動力來自加州和紐約州州長對重新營業的樂觀聲明，紐約州州長庫莫概述了分階段重開因疫情受重創的州。

週一，美國國債收益率收市基本持平，主要是企業債券發行量沉重打壓價格，並且在新一輪美中緊張局勢引發避險情緒，帶動收益率脫離低位。

隨著更多國家宣布將開始放鬆冠狀封鎖，以及全球主要生產國和公司的原油供應減少，石油價格週一在美國交易中上升。

MSCI	昨日收市	昨日	上週	月初至今	年初至今	2020年1月	2020年2月	2020年3月	自1月17日
世界	475	-0.7	-1.1	-2.8	-15.2	-1.1	-8	-13.4	-21.3
美國	2,715	0.5	-1.2	-2.3	-11.2	0.2	-8.2	-12.7	-19.6
歐洲	1,364	-3.3	-1.4	-3.7	-22.6	-2.5	-9.3	-14.4	-24.2
日本	2,913	0	-1.1	-2.3	-14.2	-1.4	-9.1	-7	-16.6
新興市場	888	-3.1	-0.8	-4	-19.9	-4.7	-5.3	-15.4	-23.6
亞太區除日本外	459	-2.8	-1.3	-4.2	-16.6	-3.7	-4.2	-14	-20.7
亞洲除日本	586	-3.3	-1.3	-3.9	-14.5	-4.4	-2.9	-12	-18.4
澳大利亞	601	0.7	-1.1	-5.9	-27.6	0.1	-11	-25.1	-33.2
香港	10,043	-3.5	-2.6	-3.7	-14.6	-4.5	-1.4	-12.2	-17.3
中國H	77.8	-2.8	-3	-4.2	-8.5	-4.8	1	-6.6	-10.2
中國A	1,733	0	1.6	-1	-3.9	-1.8	-0.4	-7.1	-9.2
韓國	382	-3.7	-2	-3.7	-19.2	-5.3	-7.4	-11.5	-22.4
台灣	390	-3.2	1.4	-3.2	-10.6	-4.7	-1.9	-13.4	-19
泰國	352	Hol	3.2	0	-23	-8.6	-12.2	-17.4	-33.7
馬來西亞	272	-2.2	1.6	-2.2	-16.7	-3.9	-6.4	-10.2	-19.2
新加坡	414	-3	1.1	-3.5	-24.9	-3.5	-7.1	-19.9	-28.2
印度尼西亞	552	-4.6	5	-4.6	-35.2	-2.7	-11.9	-29.3	-39.4
印度	442	-6	1	-6	-24.8	-0.8	-7.3	-25.1	-31.1
菲律賓	389	-2.7	2.5	-2.7	-27.8	-8	-5.9	-21.4	-32
本地指數	昨日收市	昨日	上週	月初至今	年初至今	2020年1月	2020年2月	2020年3月	自1月17日
道瓊斯工業平均指數	23,749.80	0.1	-1.6	-2.5	-16.2	-0.9	-9.8	-13.6	-22.7
納斯達克	8,711	1.2	-0.2	-2	-2.6	2	-6.3	-10	-14
標普500	2,843	0.4	-1.2	-2.4	-11.5	0	-8.2	-12.4	-19.6
STOXX歐洲600指數	328	-2.6	-2	-3.4	-20.1	-1.2	-8.3	-14.4	-22.5
富時100	5,753.80	-0.2	-1.6	-2.5	-22.9	-3.4	-9	-13.4	-23.8
德國DAX指數	10,466.80	-3.6	-1.8	-3.6	-21	-2	-8.4	-16.4	-25
巴黎CAC 40	4,378.20	-3.9	-2.5	-3.9	-26.1	-2.7	-8.6	-17	-26.2
富時意大利MIB	17,035.60	-3.7	-2	-3.7	-27.2	-0.8	-5.4	-22.4	-27.2
西班牙Ibex 35	6,673	-3.6	-0.9	-3.6	-29.5	-1.6	-6.9	-22.1	-28.6
恒生指數	23,613.80	-4.2	-2.7	-4.2	-16.1	-6.7	-0.4	-9.5	-15.9
南韓綜合	251	-2.9	-1.7	-2.9	-14.5	-3.1	-5.8	-11.4	-19.2
債券和商品	昨日收市	昨日	上週	月初至今	年初至今	2020年1月	2020年2月	2020年3月	自1月17日
布倫特 (%CHG)	27.3	3.2	35.4	7.1	-58.8	-12.2	-13.2	-55.3	-65.9
WTI (%CHG)	20	8.2	59.6	8.2	-66.6	-15.6	-8.7	-56.5	-66.5
美國10年基點	1	0	-2	-1	-67	-21	-24	-42	-65
美國3月基點	0	-4.6	-9	-2	-93	0	-17	-90	-92
美國2年基點	0.18	-9.9	-19	-3	-88	-15	-34	-74	-85

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 | T: +65 6349 9100