

Daily Focus

Market Overview

USA

S&P 500 falls for a fourth day, Nasdaq posts back-to-back losses as tech names slide. The Dow rose 16.04 points or 0.04%. The S&P 500 Index fell 15.59 points or 0.24%, and the Nasdaq fell 142.09 points or 0.67%.

China

The A-share market closed higher. The Shanghai Composite Index rose 38.92 points or 1.04% to close at 3,766. The ChiNext Index rose 5.91 points or 0.23% to close at 2,607, with a total turnover of CNY 2,410 billion.

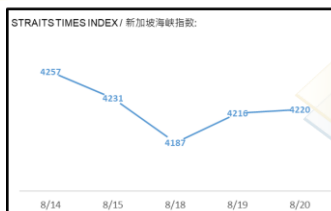
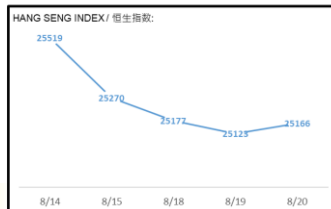
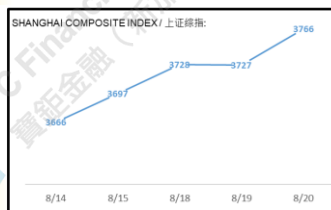
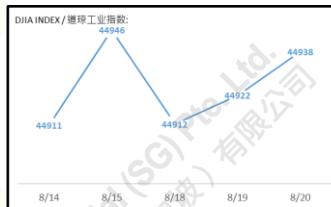
Hong Kong

The Hang Seng Index rose 43.04 points or 0.17% to close at 25,165. The Hang Seng Tech Index fell 0.76 points or 0.01% to close at 5,541, with a total turnover of HKD 285.2 billion.

Singapore

The Straits Times Index rose 3.35 points or 0.08% to close at 4,219, with a total turnover of S\$1.49 billion.

Major Market Indexes



| Market | Price | Change | Change% |
|------------------|----------|-----------|---------|
| USA | | | |
| DJIA | 44938.31 | ↑ 16.04 | 0.04% |
| Nasdaq | 21172.86 | ↓ -142.09 | -0.67% |
| S&P500 | 6395.78 | ↓ -15.59 | -0.24% |
| Europe | | | |
| FTSE100 | 9288.14 | ↑ 98.92 | 1.08% |
| CAC40 | 7973.03 | ↓ -6.05 | -0.08% |
| DAX | 24276.97 | ↓ -146.10 | -0.60% |
| STOXX600 | 559.09 | ↑ 1.28 | 0.23% |
| Asia | | | |
| Nikkei 225 | 42888.55 | ↓ -657.74 | -1.51% |
| Shanghai | 3766.21 | ↑ 38.92 | 1.04% |
| Hang Seng | 25165.94 | ↑ 43.04 | 0.17% |
| STI | 4219.54 | ↑ 3.35 | 0.08% |
| JCI | 7943.83 | ↑ 80.88 | 1.03% |
| TWSE | 23625.44 | ↓ -728.06 | -2.99% |
| Forex | | | |
| EURUSD | 1.17 | ↑ 0.0005 | 0.04% |
| GBPUSD | 1.35 | ↓ -0.0034 | -0.25% |
| USDJPY | 147.33 | ↓ -0.3400 | -0.23% |
| USDCNH | 7.18 | ↓ -0.0051 | -0.07% |
| USDHKD | 7.81 | ↑ 0.0133 | 0.17% |
| USDSGD | 1.29 | ↑ 0.0002 | 0.02% |
| USDIDR | 16272.00 | ↑ 26.00 | 0.16% |
| Commodity | | | |
| Gold | 3343.40 | ↑ 30.00 | 0.91% |
| WTI Oil | 62.71 | ↑ 0.86 | 1.38% |



Eurostat announced that the eurozone's consumer price index rose 2% year-on-year in July, in line with market expectations and following a 2% increase in the previous reading.



The Office for National Statistics announced that its consumer price index rose 3.8% year-on-year in July, reaching its highest level since January 2024, exceeding market expectations of a 3.7% increase and the previous reading of 3.6%.



S&P Global announced that Japan's S&P Manufacturing PMI rose to 49.9 in August, but remained below the 50 boom-bust level for two consecutive months, primarily due to pressure from US tariffs on overseas demand.



The Bank of Korea announced that its producer price index (PPI) rose 0.5% year-on-year in July, the same as the previous reading.

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