

Jurnal bursier — Europa

15 octombrie 2009

Indicii bursieri europeni s-au aflat astazi intr-o usoara scadere, dupa ce rezultatele trimestriale ale Goldman Sachs si Citigroup nu au reusit sa ii surprinda pe investitori. Moneda euro a ramas in acelasi raport cu dolarul american, dar s-a devalorizat fata de lira sterlina cu peste 1,5%.

Indicele preturilor de consum in zona euro a ramas neschimbat in luna septembrie, desi economistii estimau in medie o crestere a acestuia cu 0,1%. In ultimele 12 luni, indicele a scazut cu 0,3%, in linie cu asteptarile analistilor. Cu toate acestea, deprecierea

se datoreaza in principal preturilor la energie, caci indicele Core CPI, ce nu ia in considerare aceasta categorie de preturi, a crescut in ultimele 12 luni cu 1,2%. In Germania, pretul energiei electrice cu livrare in anul viitor a scazut astazi la minimul saptamanii, afectand cotațiile actiunilor din sectorul utilitatilor electrice. Astfel, E.ON a pierdut 1,34%, iar actiunile RWE au scazut cu 1,96%.

In Marea Britanie, Xstrata a decis sa renunte la preluarea companiei Anglo American, anuntul afectand cotațiile companiilor din sectorul minier.

Nume	Valoare	Variație (%)	Variație	Variație 2009 (%)
Europa de Vest				
DAX	5830.77	-0.40%	-23.37	21.22%
FTSE	5222.95	-0.63%	-33.15	17.79%
CAC 40	3883.83	0.03%	1.16	20.69%
IBEX Spania	11849.70	-0.18%	-21.20	28.86%
AEX Olanda	325.19	-0.09%	-0.28	32.22%
SPMIB Italia	24339.76	-0.03%	-8.47	25.08%
SMI Elveția	6383.19	-0.35%	-22.73	15.33%
DJ Euro Stoxx 50	2939.09	-0.40%	-11.73	20.08%
DJ Stoxx 600	247.28	0.12%	0.30	24.66%
Europa de Est				
WIG Polonia	38626.43	-0.89%	-348.37	41.86%
BUX Ungaria	21268.92	-0.45%	-96.83	73.74%
PX Cehia	1162.20	-1.22%	-14.40	35.42%
BET România	4566.94	-0.35%	-15.85	57.42%
Forex				
EUR / USD	1.4934	0.06%	0.0009	6.89%
USD / CHF	1.0156	0.06%	0.0006	-4.97%
GBP / USD	1.6269	1.80%	0.0288	11.49%
EUR / JPY	135.36	1.42%	1.8900	6.84%
EUR / GBP	0.9179	-1.74%	-0.0163	-3.86%
USD / HUF	178.81	-0.04%	-0.0700	-5.94%
EUR / HUF	267.08	0.02%	0.0500	0.55%
USD / PLN	2.8018	-0.75%	-0.0212	-5.65%
EUR / PLN	4.1843	-0.70%	-0.0294	0.85%
USD / RON	2.8746	-0.17%	-0.0049	-0.33%
EUR / RON	4.2934	-0.11%	-0.0047	6.53%

Actiunile **Metro AG**, cel mai mare retailer german, au primit astazi recomandarea „outperform” din partea analistilor JP Morgan, care considera ca planul de reducere a costurilor va avea deja efecte observabile in rezultatele financiare pe trimestrul al treilea. Acestia estimeaza ca profitul Metro pe 2009 inainte de dobanzi si taxe se va situa la 2,01 miliarde EUR.

Metro, ce planuieste sa renunte la circa 5% din angajati, estimeaza ca masura va mari profitul companiei cu 1,5 miliarde EUR in urmatorii patru ani. Actiunile Metro au crescut astazi cu 1,8%, pana la 39,81 EUR.

Xstrata a decis sa renunte la oferta facuta companiei miniere **Anglo American**, dupa aceasta fusese refuzata in iunie de catre managementul companiei, iar autoritatile britanice acordasera Xstrata ocazia sa faca o oferta formala pana la 20 octombrie. In aceste conditii, Xstrata nu va mai putea face o noua oferta formala pentru Anglo American in urmatoarele sase luni decat in cazul in care aceasta este acceptata de conducerea Anglo sau o alta companie face o oferta de preluare. Actiunile Anglo American s-au depreciat astazi cu 4,11%, pana la 2216 pence, iar actiunile Xstrata au scazut cu 2,04%, pana la 1010 pence.

Evoluția companiilor din indicele DAX

Name	Change 2009	Change today	P/E	Price/Book Value
DAX INDEX	21.22%	-0.40%	46.99	1.54
DEUTSCHE BANK AG-REGISTERED	102.59%	0.68%	#N/A/N/A	1.02
BAYERISCHE MOTOREN WERKE AG	55.39%	-1.34%	#N/A/N/A	1.09
MAN SE	51.34%	0.50%	18.9	1.64
HANNOVER RUECKVERSICHERU-REG	50.40%	-2.34%	105.75	1.29
BASF SE	44.64%	-1.23%	31.76	2.2
HENKEL AG & CO KGAA VORZUG	40.37%	2.29%	11.17	2.19
METRO AG	39.34%	1.82%	21.75	2.44
SAP AG	37.86%	-0.80%	22.45	5.87
THYSSENKRUPP AG	35.55%	1.34%	#N/A/N/A	1.31
ADIDAS AG	33.75%	1.51%	19.31	2.2
DAIMLER AG-REGISTERED SHARES	31.44%	-0.01%	#N/A/N/A	1.24
COMMERZBANK AG	30.05%	-0.63%	#N/A/N/A	0.36
SIEMENS AG-REG	29.94%	-0.80%	28.17	2.31
SALZGITTER AG	29.35%	0.06%	53.09	0.94
LINDE AG	26.57%	0.00%	21.64	1.54
BAYER AG	17.45%	0.02%	27.89	2.19
ALLIANZ SE-REG	16.41%	-0.92%	11.05	1.14
DEUTSCHE BOERSE AG	15.10%	0.55%	12.96	4.09
DEUTSCHE POST AG-REG	8.56%	1.29%	#N/A/N/A	1.84
MERCK KGAA	8.20%	0.79%	174.5	1.61
DEUTSCHE LUFTHANSA-REG	6.88%	-0.25%	#N/A/N/A	0.92
MUENCHENER RUECKVER AG-REG	1.77%	-1.09%	17.93	1.05
BEIERSDORF AG	0.65%	1.23%	20.79	4.36
FRESENIUS MEDICAL CARE AG &	0.57%	0.42%	17.74	2.31
FRESENIUS SE-PREF	-2.86%	0.07%	19.61	1.51
K+S AG	-2.88%	-0.99%	10.06	4.62
RWE AG	-4.24%	-1.96%	8.89	2.77
E.ON AG	-6.54%	-1.34%	18.59	1.37
DEUTSCHE TELEKOMAG-REG	-11.16%	0.74%	#N/A/N/A	1.16
VOLKSWAGEN AG	-52.30%	0.13%	17.59	1.39

- Raportul P/E nu este definit în cazul companiilor care au raportat pierderi pe ultimul trimestru.

Companiile europene cu cel mai mare impact asupra indicilor

DAX

Leading 5

Code		Name	Price	% Change	Index Points
DBK	GY	DEUTSCHE BAN	56.38	0.68%	2.70
DTE	GY	DEUTSCHE TEL	9.55	0.74%	2.40
DPW	GY	DEUTSCHE POS	12.93	1.29%	1.60
HEN3	GY	HENKEL AG -P	31.71	2.29%	1.45
TKA	GY	THYSSENKRUPP	25.7	1.34%	1.30

Lagging 5

Code		Name	Price	% Change	Index Points
EOAN	GY	E.ON AG	26.58	-1.34%	-7.13
RWE	GY	RWE AG	61	-1.96%	-5.84
BAS	GY	BASF SE	40.11	-1.23%	-5.28
SIE	GY	SIEMENS AG-R	68.45	-0.80%	-4.72
ALV	GY	ALLIANZ SE-R	87.31	-0.92%	-4.19

FTSE

Leading 5

Code		Name	Price	% Change	Index Points
GSK	LN	GLAXOSMITHKL	1272.5	1.07%	2.77
SBRY	LN	SAINSBURY PL	342.5	10.09%	2.27
TSCO	LN	TESCO PLC	380.2	1.66%	1.91
VOD	LN	VODAFONE GRO	136.05	0.44%	1.24
PRU	LN	PRUDENTIAL P	639	1.11%	0.69

Lagging 5

Code		Name	Price	% Change	Index Points
HSBA	LN	HSBC HLDGS P	707.9	-2.09%	-10.28
AAL	LN	ANGLO AMER P	2216	-4.11%	-4.93
RDSA	LN	ROYAL DUTCH	1839	-1.47%	-3.82
RDSB	LN	ROYAL DUTCH	1785	-1.71%	-3.29
RIO	LN	RIO TINTO PL	2946	-1.73%	-3.11

CAC

Leading 5

Code	Name	Price	% Change	Index Points
CS FP	AXA	19.72	1.15%	1.978
DEXB BB	DEXIA SA	6.64	6.21%	1.918
SAN FP	SANOFI-AVENT	53.57	0.49%	1.535
SGO FP	SAINT GOBAIN	39.61	1.64%	1.473
BNP FP	BNP PARIBAS	56.21	0.46%	1.334

Lagging 5

Code	Name	Price	% Change	Index Points
VIV FP	VIVENDI	20.24	-1.80%	-2.423
FTE FP	FRANCE TELECOM	17.65	-0.73%	-1.352
AC FP	ACCOR SA	36.5	-3.46%	-0.993
ALU FP	ALCATEL-LUCIE	3.21	-2.25%	-0.914
ALO FP	ALSTOM	51.7	-1.51%	-0.894

SMI

Leading 5

Code	Name	Price	% Change	Index Points
NOVN VX	NOVARTIS AG-	52.45	1.55%	16.400
CFR VX	CIE FINANCI-	30.86	4.68%	6.021
UHR VX	SWATCH GROUP	263.75	6.78%	4.318
SYNN VX	SYNGENTA AG-	251.25	0.98%	1.937
HOLN VX	HOLCIM LTD-R	73.6	0.82%	1.342

Lagging 5

Code	Name	Price	% Change	Index Points
ROG VX	ROCHE HLDG-G	163.9	-3.30%	-32.890
CSGN VX	CREDIT SUISS	59.4	-1.66%	-9.069
RUKN VX	SWISS REINSU	47.64	-3.56%	-5.034
UBSN VX	UBS AG-REG	19.04	-0.83%	-4.759
ABBN VX	ABB LTD-REG	22.16	-0.18%	-0.777