

Jurnal bursier — Europa

12 ianuarie 2009

Indicii bursieri europeni au cunoscut scaderi pronuntate astazi, dupa ce sezonul de raportari trimestriale pentru companiile americane a inceput intr-o nota proasta cu rezultatele sub asteptari anuntate de Alcoa. De asemenea, banca centrala din China a cerut bancilor sa mareasca rezervele minime. Miscarea face parte dintr-un efort mai amplu al autoritatilor chineze de a evita supraincalzirea economiei, care a avut o crestere de 8,9% in ultimul trimestru.

Dintre indicii vest-europeni, indicele german DAX a avut cea mai mare depreciere, de 1,61%, ajungand la o evolutie negativa in 2010, pe fondul anunturilor negative facute de companiile BASF si Beiersdorf. Indicele Dow Jones Stoxx 600 a scazut cu 0,94%. Cotatia EURUSD nu a cunoscut variatii mari, dar preturile marfurilor au scazut ca urmare a prognozelor meteo favorabile pentru urmatoarea saptamana, tragand in jos sectorul minier si cel energetic.

Nume	Valoare	Variatie (%)	Variatie	Variatie 2010 (%)
Europa de Vest				
DAX	5943.00	-1.61%	-97.50	-0.24%
FTSE	5498.71	-0.71%	-39.36	1.59%
CAC 40	4000.05	-1.06%	-43.04	1.62%
IBEX Spania	11966.10	-0.90%	-108.40	0.22%
AEX Olanda	336.77	-1.10%	-3.75	0.43%
SPMB Italia	23583.35	-0.81%	-191.41	1.44%
SMI Elveția	6541.90	-0.76%	-50.36	-0.06%
DJ Euro Stoxx 50	2976.89	-1.11%	-33.35	0.40%
DJ Stoxx 600	256.38	-0.94%	-2.43	0.98%
Europa de Est				
WIG Polonia	40961.16	-0.92%	-381.46	2.44%
BUX Ungaria	22659.62	-1.32%	-302.90	6.75%
PX Cehia	1176.60	-0.51%	-6.00	5.31%
BET România	5119.05	-1.12%	-57.90	9.14%
Forex				
EUR / USD	1.4491	-0.15%	-0.0022	1.19%
USD / CHF	1.0184	0.20%	0.0020	-1.62%
GBP / USD	1.6162	0.29%	0.0047	-0.05%
EUR / JPY	131.85	-1.34%	-1.7900	-1.01%
EUR / GBP	0.8966	-0.45%	-0.0040	1.09%
USD / HUF	184.65	0.32%	0.5800	-2.30%
EUR / HUF	267.56	0.19%	0.5200	-1.05%
USD / PLN	2.8110	0.31%	0.0087	-1.81%
EUR / PLN	4.0735	0.17%	0.0068	-0.66%
USD / RON	2.8510	0.32%	0.0092	-3.50%
EUR / RON	4.1392	0.34%	0.0142	-2.17%

Beiersdorf AG, producator german de bunuri de larg consum precum cremele Nivea si benzile adezive Tesa, a anuntat astazi ca profitul net a scazut in 2009 cu 33%, la 379 milioane EUR, sub estimarea medie a analistilor, de 399 milioane EUR. Vanzarile diviziei de produse de infrumusetare au scazut cu 2,2%, iar vanzarile diviziei Tesa au avut o scadere de 13%, fiind mai afectate deoarece 80% din vanzari se duc catre clientii industriali. Actiunile Beiersdorf au scazut astazi cu 3,2%, pana la 43,755 EUR.

BASF SE, cel mai mare producator din industria chimica la nivel mondial, a anuntat astazi ca in mod probabil nu a reusit sa atinga tinta de profitabilitate necesara pentru pastrarea dividendului anual al companiei la acelasi nivel ca in anul 2008. In iulie 2009, compania facuse aceeasi predictie, dar in luna decembrie analistii se aratau increzatori in mentinerea dividendului, ca urmare a rezultatelor bune preconizate pentru a doua jumatate a anului. Actiunile BASF au scazut astazi cu 3,5%, inchizand sedinta la 41,98 EUR.

Evoluția companiilor din indicele DAX

Name	Change 2010	Change today	P/E	Price/Book Value
DAX INDEX	-0.24%	-1.61%	60.12	1.51
COMMERZBANK AG	12.06%	-4.28%	#N/A/N/A	0.28
K+S AG	10.79%	-3.01%	25.14	5.74
DEUTSCHE LUFTHANSA-REG	5.87%	-2.89%	311	0.94
DEUTSCHE POST AG-REG	4.19%	-2.29%	#N/A/N/A	2.04
SAP AG	4.06%	-0.97%	21.73	5.26
SALZGITTER AG	3.68%	-2.61%	#N/A/N/A	0.95
DEUTSCHE BANK AG-REGISTERED	3.60%	-2.59%	#N/A/N/A	0.92
SIEMENS AG-REG	3.25%	-1.22%	24.56	2.16
INFINEON TECHNOLOGIES AG	2.71%	-1.85%	#N/A/N/A	1.91
ADIDAS AG	2.18%	-3.15%	26.8	2.29
THYSSENKRUPP AG	1.29%	-2.41%	#N/A/N/A	1.56
RWE AG	0.21%	-1.02%	17.78	2.85
MUENCHENER RUECKVER AG-REG	-0.11%	0.28%	11.34	0.94
MERCK KGAA	-0.29%	-0.98%	499.77	1.49
ALLIANZ SE-REG	-0.60%	-0.43%	9	0.99
VOLKSWAGEN AG-PFD	-0.82%	-2.61%	15.6	0.74
HENKEL AG & CO KGAA VORZUG	-1.18%	1.19%	12	2.45
FRESENIUS MEDICAL CARE AG &	-1.19%	-0.42%	18.3	2.32
E.ON AG	-1.23%	-1.67%	12.44	1.41
LINDE AG	-1.54%	-0.86%	24.02	1.67
BAYERISCHE MOTOREN WERKE AG	-1.78%	-2.91%	#N/A/N/A	1.02
DEUTSCHE TELEKOM AG-REG	-1.85%	-0.79%	#N/A/N/A	1.23
MAN SE	-2.31%	-3.17%	47.06	1.42
DAIMLER AG-REGISTERED SHARES	-2.55%	-2.47%	#N/A/N/A	1.26
FRESENIUS SE-PREF	-3.33%	-0.99%	27.31	1.92
BASF SE	-3.41%	-3.56%	59.72	2.26
METRO AG	-3.97%	-0.92%	24.63	2.5
BEIERSDORF AG	-4.74%	-3.22%	22.21	4.39
BAYER AG	-4.75%	-0.95%	31.73	2.42
DEUTSCHE BOERSE AG	-5.17%	-2.24%	13.72	3.67

- 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
HEN3	HENKEL AG -P	36.00	1.19%	0.85
MUV2	MUENCHENER R	108.55	0.28%	0.66
FME	FRESENIUS ME	36.50	-0.42%	-0.33
FRE3	FRESENIUS SE	48.35	-0.99%	-0.44
MRK	MERCK KGAA	64.97	-0.98%	-0.46

Lagging 5

Code	Name	Price	% Change	Index Points
BAS	BASF SE	41.98	-3.56%	-15.94
EOAN	E.ON AG	28.87	-1.67%	-10.08
DBK	DEUTSCHE BAN	51.20	-2.59%	-9.43
DAI	DAIMLER AG	36.28	-2.47%	-8.80
SIE	SIEMENS AG-R	66.30	-1.22%	-7.49

FTSE

Leading 5

Code	Name	Price	% Change	Index Points
BG/	BG GROUP PLC	1235.00	0.98%	1.57
TSCO	TESCO PLC	421.00	0.75%	0.96
IMT	IMPERIAL TOB	1952.00	0.72%	0.55
AV/	AVIVA PLC	409.50	1.19%	0.52
BT/A	BT GROUP PLC	144.30	1.19%	0.51

Lagging 5

Code	Name	Price	% Change	Index Points
RDSA	ROYAL DUTCH	1896.00	-1.61%	-4.27
BLT	BHP BILLITON	2056.00	-2.30%	-4.15
RIO	RIO TINTO PL	3557.50	-1.81%	-3.88
AAL	ANGLO AMER P	2771.00	-2.60%	-3.81
XTA	XSTRATA PLC	1184.00	-3.31%	-3.44

CAC

Leading 5

Code	Name	Price	% Change	Index Points
RI	PERNOD-RICAR	59.28	1.33%	0.91
BN	DANONE	42.84	0.61%	0.83
FTE	FRANCE TELECOM	17.35	0.32%	0.56
LG	LAFARGE SA	61.01	0.00%	0.00
MMB	LAGARDERE SC	28.11	-0.12%	-0.02

Lagging 5

Code	Name	Price	% Change	Index Points
FP	TOTAL SA	45.65	-1.32%	-7.08
MT	ARCELORMITTA	32.21	-2.82%	-4.41
MC	LVMH MOET HE	79.35	-2.88%	-3.16
ACA	CREDIT AGRIC	12.92	-3.47%	-2.37
SGO	SAINT GOBAIN	37.53	-2.63%	-2.29

SMI

Leading 5

Code	Name	Price	% Change	Index Points
NOVN	NOVARTIS AG-	54.00	0.37%	4.10
SLHN	SWISS LIFE H	152.70	5.53%	1.82
SGSN	SGS SA-REG	1405.00	2.48%	1.53
SYST	SYNTHES INC	136.70	2.01%	1.41
CFR	CIE FINANCI-	36.79	0.88%	1.40

Lagging 5

Code	Name	Price	% Change	Index Points
CSGN	CREDIT SUISS	54.90	-2.05%	-10.43
NESN	NESTLE SA-RE	48.83	-0.57%	-8.54
UBSN	UBS AG-REG	17.04	-0.99%	-5.06
SYNN	SYNGENTA AG-	285.80	-1.45%	-3.32
ABBN	ABB LTD-REG	20.88	-0.81%	-3.30