

Jurnal bursier — Europa

15 mai 2009

Principalii indici europeni au terminat mixt si fara variatii importante sesiunea de azi, insa au inchis saptamana cu pierderi importante de circa 3%-4%. Indicele german DAX a scazut usor cu 0,02% la valoarea de 4737 puncte, extinzandu-si deprecierea saptamanala la 3,6%. Economia germana a scazut cu 3,8% in primul trimestru al anului, aceasta fiind cea mai severa contractie trimestriala de cand a inceput calcularea datelor in 1970. Volkswagen a scazut cu 1% la valoarea de 220,38 euro, inregistrand a cincea zi consecutiva de pierderi. Indicele londonez FTSE 100 s-a depreciat in

acesta saptamana cu 2,6%, marcand prima saptamana de scaderi din ultima luna. Companiile petroliere si miniere ce se regasesc intr-un numar mare in componenta indicelui au scazut semnificativ in aceasta saptamana, dupa ce si petrolul s-a corectat de la maximul ultimelor sase luni. Economia zonei euro s-a contract in primele trei luni ale anului cu 2,5%, inregistrand cea mai mare scadere trimestriala din ultimii 13 ani. Indicele preturilor de consum in zona euro a inregistrat o crestere anualizata in aprilie de 0,6%, in timp ce fata de luna martie inflatia la nivelul consumatorilor a crescut cu 0,4%.

Nume	Valoare	Variație (%)	Variație	Variație 2009 (%)
Europa de Vest				
Dax	4737.50	-0.02%	-0.97	-1.51%
FTSE	4348.11	-0.33%	-14.47	-1.94%
CAC 40	3169.05	0.40%	12.76	-1.52%
IBEX Spania	8978.60	-0.06%	-5.60	-2.36%
AEX Olanda	252.92	1.57%	3.90	2.84%
SPMB Italia	19548.00	1.44%	277.00	0.45%
SMI Elvetia	5350.67	-0.17%	-9.33	-3.32%
DJ Euro Stoxx 50	2364.10	0.45%	10.57	-3.41%
Europa de Est				
WIG Polonia	29424.40	0.39%	112.87	8.06%
BUX Ungaria	14118.49	2.06%	285.29	15.33%
PX Cehia	901.20	1.84%	16.30	5.01%
BET Romania	2942.93	0.04	103.30	1.44%
Forex				
EUR / USD	1.3483	-1.14%	-0.0156	-3.49%
USD / CHF	1.1227	1.67%	0.0184	5.05%
GBP / USD	1.5170	-0.45%	-0.0069	3.90%
EUR / JPY	128.26	-1.84%	-2.41	1.23%
EUR / GBP	0.8887	-0.74%	-0.0066	-6.92%
USD / HUF	213.20	0.58%	1.2300	12.15%
EUR / HUF	287.47	-0.58%	-1.68	8.23%
USD / PLN	3.3174	1.06%	0.03	11.71%
EUR / PLN	4.4731	-0.10%	-0.0043	7.81%
USD / RON	3.1064	1.37%	0.0420	7.71%
EUR / RON	4.1886	0.21%	0.0087	3.93%

Barclays, a treia mare banca britanica, se afla in discutii pentru vanzarea diviziei de management al activelor, printre potentialii cumparatori aflandu-se Blackrock si Bank of New York Mellon. Banca ar putea obtine pe Barclays Global Investors circa 10 miliarde dolari. In acest moment exista o oferta de 4,4 miliarde dolari pentru divizia de ETF-uri iShares din partea CVC Capital Partners valabila pana la 18 iunie, timp in care Barclays poate analiza si alte oferte. Barclays este in cautare de capital aditional pentru a-si putea consolida capitalul afectat, inasa refuza sa primeasca fonduri guvernamentale asa cum au facut-o Royal Bank of Scotland si Lloyds. Actiunile Barclays au inchis sesiunea londoneza cu o crestere de 5,8%.

Commerzbank, a doua mare banca germana, a crescut la bursa din Frankfurt cu 2,8% dupa ce CEO-ul Martin Blessing a declarat ca banca nu mai are nevoie de ajutor financiar din partea statului. Mai mult, Commerzbank nu va fi influentata de guvern nici dupa ce acesta va deveni actionarul majoritar al companiei.

Rio Tinto, a treia companie miniera la nivel mondial, a crescut cu 2,7% la bursa londoneza dupa ce a anuntat ca intentioneaza sa urmeze planul privind colaborarea cu Aluminium Corp of China prin care compania isi va mari capitalul cu 19,5 miliarde dolari. Actiunile Rio Tinto s-au prabusit cu 17% in urma cu doua zile ca urmare a speculatiilor conform carora compania ar renunta la intelegerea cu Chinalco, preferan ca metoda de marire a capitalului vanzarea de actiuni.

Evoluția companiilor din indicele DAX

Company	Change 2009	Change today	P/E	Price/Book Value
DAX INDEX	-1.51%	-0.02%	24.56	1.27
DEUTSCHE BANK AG-REGISTERED	44.31%	3.68%	#N/A/N/A	0.74
K+S AG	20.07%	7.00%	8.87	4.31
MAN AG	19.40%	3.59%	7.76	1.26
DEUTSCHE BOERSE AG	18.45%	6.38%	12.23	3.84
SAP AG	17.18%	-0.94%	19.46	5.05
HANNOVER RUECKVERSICHERU-REG	16.76%	0.27%	#N/A/N/A	1.08
METRO AG	15.79%	0.70%	35.57	1.93
BAYERISCHE MOTOREN WERKE AG	13.93%	-0.54%	#N/A/N/A	0.81
BASF SE	0.61%	1.83%	12.22	1.44
SALZGITTER AG	-2.80%	2.81%	7.35	0.75
LINDE AG	-2.81%	-2.10%	14.58	1.2
HENKEL AG & CO KGAA VORZUG	-3.23%	-0.32%	4.05	1.48
MERCK KGAA	-3.36%	-1.27%	73.34	1.43
FRESENIUS SE-PREF	-3.41%	-0.15%	22.66	1.66
SIEMENS AG-REG	-4.12%	0.54%	18.78	1.82
DAIMLER AG-REGISTERED SHARES	-6.20%	-0.50%	#N/A/N/A	0.84
RWE AG	-7.55%	1.01%	8.99	2.46
ALLIANZ SE-REG	-8.15%	-1.05%	9.57	0.94
FRESENIUS MEDICAL CARE AG &	-10.24%	-1.55%	14.46	2.01
BAYER AG	-10.97%	-0.80%	20.44	1.66
ADIDAS AG	-11.61%	-0.91%	9.87	1.32
VOLKSWAGEN AG	-11.88%	-0.98%	21.58	2.53
MUENCHENER RUECKVER AG-REG	-13.96%	-2.06%	16.75	0.92
THYSSENKRUPP AG	-15.72%	1.14%	6.69	0.75
E.ON AG	-17.05%	-1.95%	26.31	1.29
DEUTSCHE LUFTHANSA-REG	-17.60%	0.00%	14.63	0.67
BEIERSDORF AG	-21.40%	0.21%	14.39	3.24
DEUTSCHE POST AG-REG	-21.41%	-1.63%	#N/A/N/A	1.2
COMMERZBANK AG	-22.67%	2.80%	#N/A/N/A	0.25
DEUTSCHE TELEKOM AG-REG	-22.93%	-1.60%	#N/A/N/A	0.92

- Raportul P/E nu este definit pentru companiile care au raportat pierderi pe ultimul trimestru

Europe Index Movers – by index points

Dax

Leading 5

Code		Name	Price	% Change	Index Points
DBK	GY	DEUTSCHE BAN	40.16	3.68%	8.78
DB1	GY	DEUTSCHE BOE	60.17	6.38%	7.72
BAS	GY	BASF SE	27.9	1.82%	5.40
SDF	GY	K+S AG	47.99	7.00%	4.46
RWE	GY	RWE AG	58.89	1.01%	2.86

Lagging 5

Code		Name	Price	% Change	Index Points
EOAN	GY	E.ON AG	23.59	-1.95%	-9.98
DTE	GY	DEUTSCHE TEL	8.29	-1.60%	-4.82
MUV2	GY	MUENCHENER R	95.5	-2.06%	-4.56
ALV	GY	ALLIANZ SE-R	68.89	-1.05%	-3.82
BAY	GY	BAYER AG	36.99	-0.80%	-2.61

FTSE

Leading 5

Code		Name	Price	% Change	Index Points
BARC	LN	BARCLAYS PLC	267.75	5.83%	4.96
RIO	LN	RIO TINTO PL	2664	2.70%	2.82
BLT	LN	BHP BILLITON	1410	1.29%	1.60
AAL	LN	ANGLO AMER P	1465	1.52%	1.17
IMT	LN	IMPERIAL TOB	1620	1.19%	0.78

Lagging 5

Code		Name	Price	% Change	Index Points
VOD	LN	VODAFONE GRO	123.2	-2.30%	-6.14
HSBA	LN	HSBC HLDGS P	532	-1.44%	-5.36
GSK	LN	GLAXOSMITHKL	1051	-1.31%	-2.95
BP/	LN	BP PLC	501	-0.64%	-2.46
RDSA	LN	ROYAL DUTCH	1603	-0.87%	-2.00

CAC

Leading 5

Code	Name	Price	% Change	Index Points
MT NA	ARCELORMITTA	19.35	4.20%	3.366
GLE FP	SOC GENERALE	35.76	2.57%	2.815
DG FP	VINCI SA	34.02	1.83%	1.560
VIV FP	VIVENDI	19.18	1.19%	1.426
FP FP	TOTAL SA	40.47	0.27%	1.413

Lagging 5

Code	Name	Price	% Change	Index Points
SAN FP	SANOFI-AVENT	44.22	-1.49%	-3.818
CA FP	CARREFOUR SA	28.91	-1.33%	-1.340
FTE FP	FRANCE TELECOM	17.01	-0.64%	-1.168
BN FP	DANONE	38.78	-1.08%	-1.064
CS FP	AXA	12.03	-0.70%	-0.769

SMI

Leading 5

Code	Name	Price	% Change	Index Points
SYNN VX	SYNGENTA AG-	261	3.78%	7.705
ABBN VX	ABB LTD-REG	16.8	1.69%	5.443
BAER VX	BAER HLDG-RE	41.26	5.15%	3.567
CFR VX	CIE FINANCIAL	22.62	2.82%	2.708
RUKN VX	SWISS RE-R	36	1.41%	1.405

Lagging 5

Code	Name	Price	% Change	Index Points
NESN VX	NESTLE SA-RE	40.36	-0.98%	-12.180
NOVN VX	NOVARTIS AG-	44.08	-0.90%	-8.849
ROG VX	ROCHE HLDG-G	145.7	-0.88%	-7.643
UBSN VX	UBS AG-REG	15.04	-0.73%	-2.700
ZURN VX	ZURICH FINL	195.7	-0.41%	-0.951