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Planul administratiei Obama de a limita riscul pe care si-l pot asuma marile banci americane a dus la scaderi importante in pietele de capital, indicii europeni fiind si ei larg afectati. Indicele german DAX, ce ieri pierduse circa 2% din valoare pe fondul temerilor privind limitarea creditarii in China, a scazut si astazi cu 1,79%, ajungand astfel la mai bine de 5% sub maximul anual.

Sectorul financiar a cunoscut cele mai mari scaderi astazi, actiunile Deutsche Bank pierzand 2,49% din valoare, Societe Generale 4,74%, iar Barclays 5,93%.

La nivel macroeconomic, indicatorii PMI au aratat o

temperare a ritmului de crestere a sectorului serviciilor in zona Euro in luna ianuarie, in ciuda asteptarilor analistilor de accelerare a ritmului de crestere. De altfel, Juergen Stark, membru al consiliului executiv al Bancii Centrale Europene, a declarat ieri ca economia zonei Euro va fi creste probabil intr-un ritm mai temperat in prima jumatate a lui 2010 decat in a doua jumatate a lui 2009.

Cotatia EURUSD a avut o sesiune volatila, in prima faza ajungand aproape de pragul de 1,4, dar revenind in final spre nivelul de 1,41.

Nume	Valoare	Variație (%)	Variație	Variație 2010 (%)
Europa de Vest				
DAX	5746.97	-1.79%	-104.56	-3.53%
FTSE	5335.10	-1.58%	-85.70	-1.44%
CAC 40	3862.16	-1.70%	-66.79	-1.88%
IBEX Spania	11444.00	-2.26%	-265.00	-4.15%
AEX Olanda	332.17	-1.23%	-4.13	-0.94%
SPMB Italia	22876.46	-1.08%	-249.56	-1.60%
SMI Elveția	6578.95	-0.12%	-7.58	0.51%
DJ Euro Stoxx 50	2863.25	-1.76%	-51.35	-3.43%
DJ Stoxx 600	252.76	-1.38%	-3.54	-0.45%
Europa de Est				
WIG Polonia	41347.04	-0.65%	-270.17	3.40%
BUX Ungaria	22127.31	-1.84%	-413.75	4.24%
PX Cehia	1216.20	-0.34%	-4.10	8.85%
BET România	5097.67	-1.10%	-56.48	8.68%
Forex				
EUR / USD	1.4094	-0.09%	-0.0012	-1.59%
USD / CHF	1.0424	-0.16%	-0.0017	0.70%
GBP / USD	1.6198	-0.58%	-0.0094	0.17%
EUR / JPY	127.35	-1.03%	-1.3300	-4.39%
EUR / GBP	0.8701	0.49%	0.0043	-1.89%
USD / HUF	193.08	0.55%	1.0500	2.16%
EUR / HUF	272.13	0.46%	1.2400	0.64%
USD / PLN	2.9026	1.10%	0.0316	1.39%
EUR / PLN	4.0915	1.01%	0.0411	-0.22%
USD / RON	2.9311	-0.04%	-0.0012	-0.79%
EUR / RON	4.1316	-0.15%	-0.0063	-2.35%

Actiunile **Bayer AG** au cunoscut o depreciere puternica astazi, dupa ce analistii Morgan Stanley au scazut recomandarea pentru acestea de la „overweight” la „underweight” in cadrul unei analize a sectorului farmaceutic european. Cu toate ca analistii au marit pretul tinta pentru actiunile Bayer de la 55 EUR la 58 EUR, acestia considera ca actiunile AstraZeneca sunt mai atractive la momentul actual, ridicand recomandarea pentru acestea de la „equal-weight” la „overweight” si marind pretul tinta de la 2900 pence la 3600 pence. Actiunile Bayer au scazut astazi cu 4,86%, pana la 51,08 EUR, iar actiunile AstraZeneca s-au apreciat cu 0,975, pana la 3097 pence.

Evoluția companiilor din indicele DAX

Name	Change 2010	Change today	P/E	Price/Book Value
DAX INDEX	-3.53%	-1.79%	58.07	1.51
DEUTSCHE LUFTHANSA-REG	5.96%	-0.56%	311.25	0.95
K+S AG	5.30%	-2.00%	23.89	5.46
COMMERZBANK AG	4.11%	-3.81%	#N/A/N/A	0.67
FRESENIUS SE-PREF	2.56%	-0.41%	28.98	2.04
HENKEL AG & CO KGAA VORZUG	2.53%	0.67%	12.45	2.54
MERCK KGAA	1.78%	-1.99%	510.15	1.52
SAP AG	1.18%	-1.79%	21.13	5.12
SIEMENS AG-REG	0.84%	-1.67%	23.98	2.11
FRESENIUS MEDICAL CARE AG &	0.84%	-0.71%	18.17	2.3
INFINEON TECHNOLOGIES AG	0.52%	-2.57%	#N/A/N/A	1.86
MUENCHENER RUECKVER AG-REG	0.44%	-0.27%	11.41	0.95
RWE AG	-0.90%	0.19%	17.58	2.82
SALZGITTER AG	-1.62%	-2.72%	#N/A/N/A	0.91
ADIDAS AG	-1.83%	-2.92%	25.75	2.2
DEUTSCHE POST AG-REG	-1.97%	-2.22%	#N/A/N/A	1.92
BAYERISCHE MOTOREN WERKE AG	-2.03%	-2.03%	#N/A/N/A	1.02
DEUTSCHE TELEKOM AG-REG	-4.02%	-0.95%	#N/A/N/A	1.2
METRO AG	-4.09%	0.38%	24.6	2.49
LINDE AG	-4.21%	-1.68%	23.37	1.63
THYSSENKRUPP AG	-4.60%	-3.95%	#N/A/N/A	1.47
MAN SE	-4.74%	-0.37%	45.89	1.39
DEUTSCHE BANK AG-REGISTERED	-4.90%	-2.49%	#N/A/N/A	0.84
E.ON AG	-5.27%	-1.21%	11.94	1.36
BASF SE	-5.88%	-1.33%	58.19	2.2
ALLIANZ SE-REG	-6.02%	-1.40%	8.5	0.94
BEIERSDORF AG	-6.48%	-1.11%	21.8	4.31
DAIMLER AG-REGISTERED SHARES	-6.63%	-2.35%	#N/A/N/A	1.21
BAYER AG	-8.72%	-4.86%	30.4	2.32
DEUTSCHE BOERSE AG	-9.34%	-2.61%	13.11	3.5
VOLKSWAGEN AG-PFD	-11.70%	-2.44%	13.89	0.66

- 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
RWE	RWE AG	67.35	0.19%	0.61
HEN3	HENKEL AG -P	37.35	0.67%	0.50
MEO	METRO AG	40.83	0.38%	0.22
FRE3	FRESENIUS SE	51.29	-0.41%	-0.19
MAN	MAN SE	51.86	-0.37%	-0.21

Lagging 5

Code	Name	Price	% Change	Index Points
BAYN	BAYER AG	51.08	-4.86%	-24.17
SIE	SIEMENS AG-R	64.75	-1.67%	-10.05
DBK	DEUTSCHE BAN	47.00	-2.49%	-8.32
DAI	DAIMLER AG	34.76	-2.35%	-7.99
EOAN	E.ON AG	27.69	-1.21%	-6.99

FTSE

Leading 5

Code	Name	Price	% Change	Index Points
AZN	ASTRAZENECA	3083.00	0.97%	1.67
IMT	IMPERIAL TOB	2007.00	0.60%	0.47
REL	REED ELSEVIE	520.50	1.96%	0.47
IPR	INTL POWER P	319.70	2.47%	0.45
UU/	UNITED UTILI	525.00	3.24%	0.43

Lagging 5

Code	Name	Price	% Change	Index Points
RIO	RIO TINTO PL	3294.50	-4.95%	-10.16
AAL	ANGLO AMER P	2488.00	-6.15%	-8.39
BARC	BARCLAYS PLC	283.00	-5.93%	-7.89
BP/	BP PLC	610.30	-1.49%	-6.73
STAN	STANDARD CHA	1430.00	-5.17%	-6.08

CAC

Leading 5

Code	Name	Price	% Change	Index Points
UL	UNIBAIL-RODA	155.45	0.48%	0.38
VIE	VEOLIA ENVIR	25.08	0.12%	0.07
AC	ACCOR SA	37.12	-0.27%	-0.07
RI	PERNOD-RICAR	59.03	-0.12%	-0.08
SEV	SUEZ ENVIRON	16.93	-0.56%	-0.14

Lagging 5

Code	Name	Price	% Change	Index Points
SAN	SANOFI-AVENT	55.28	-2.45%	-8.04
BNP	BNP PARIBAS	53.57	-2.62%	-7.96
GLE	SOC GENERALE	44.77	-4.74%	-7.71
FP	TOTAL SA	43.85	-1.22%	-6.27
MT	ARCELORMITTA	30.20	-3.75%	-5.54

SMI

Leading 5

Code	Name	Price	% Change	Index Points
NESN	NESTLE SA-RE	50.95	1.70%	25.93
NOVN	NOVARTIS AG-	56.20	1.17%	13.33
ROG	ROCHE HLDG-G	186.00	0.54%	5.87
SCMN	SWISSCOM AG-	390.90	0.08%	0.06
ADEN	ADECCO SA-RE	60.25	-0.82%	-0.51

Lagging 5

Code	Name	Price	% Change	Index Points
ABBN	ABB LTD-REG	19.41	-2.17%	-8.35
UBSN	UBS AG-REG	15.54	-1.58%	-7.44
CSGN	CREDIT SUISS	50.30	-1.57%	-7.26
HOLN	HOLCIM LTD-R	76.70	-3.88%	-6.93
SYNN	SYNGENTA AG-	271.40	-2.72%	-6.01