

Jurnal bursier — Europa

2 februarie 2010

Indicii bursieri europeni au crescut pentru a treia sedinta la rand, pe fondul aprecierilor din piata marfurilor, cauzate in parte de deprecierea dolarului american fata de moneda euro. Actiunile Rio Tinto, a treia companie miniera la nivel mondial dupa vanzari, au crescut cu 3,4%, dupa ce analistii Citigroup le-au recomandat spre cumparare.

Pe de alta parte, gigantul energetic BP a raportat astazi un profit trimestrial sub estimari, managerii companiei declarand ca iesirea din recesiune are loc intr-un ritm slab.

Vanzarile de retail din Germania au crescut cu 0,8% in luna decembrie fata de luna noiembrie, putin sub estimarile analistilor, de 0,9%. Totusi, fata de luna decembrie a anului 2008, vanzarile se afla in scadere cu 2,5%.

Nume	Valoare	Variație (%)	Variație	Variație 2010 (%)
Europa de Vest				
DAX	5709.66	0.98%	55.18	-4.16%
FTSE	5283.31	0.68%	35.90	-2.39%
CAC 40	3812.13	1.33%	50.12	-3.16%
IBEX Spania	11140.90	1.33%	145.70	-6.69%
AEX Olanda	334.04	0.82%	2.73	-0.39%
SPMB Italia	22413.74	1.83%	401.74	-3.59%
SMI Elveția	6550.12	0.83%	53.79	0.06%
DJ Euro Stoxx 50	2830.01	1.31%	36.72	-4.55%
DJ Stoxx 600	250.80	0.96%	2.38	-1.22%
Europa de Est				
WIG Polonia	39904.02	0.42%	167.08	-0.21%
BUX Ungaria	21858.25	-0.33%	-71.41	2.97%
PX Cehia	1176.60	-1.00%	-11.90	5.31%
BET România	5127.53	0.22%	11.46	9.32%
Forex				
EUR / USD	1.3965	0.24%	0.0034	-2.49%
USD / CHF	1.0550	-0.12%	-0.0013	1.91%
GBP / USD	1.5983	0.16%	0.0025	-1.16%
EUR / JPY	126.22	-0.02%	-0.0200	-5.24%
EUR / GBP	0.8737	0.08%	0.0007	-1.49%
USD / HUF	193.35	-0.05%	-0.0900	2.30%
EUR / HUF	269.99	0.19%	0.5100	-0.15%
USD / PLN	2.8453	-0.36%	-0.0103	-0.62%
EUR / PLN	3.9733	-0.15%	-0.0059	-3.10%
USD / RON	2.9264	-0.15%	-0.0044	-0.95%
EUR / RON	4.0882	0.13%	0.0055	-3.38%

Munich Re, cel mai mare reasurator la nivel mondial, a anuntat astazi ca va mari dividendul anual pe care actionarii companiei il primesc cu 4,5%, la 5,75 EUR. Masura vine pe fondul cresterii profitului companiei, conform rezultatelor preliminare pe ultimul trimestru. Profitul net al Munich Re s-a situat in ultimele trei luni ale anului 2009 la 780 milioane EUR, fata de 105 milioane EUR in aceeași perioada a anului 2008. Profitul net inregistrat in intregul an a fost de 2,56 miliarde EUR, dar CFO-ul companiei a declarat ca tinta de profit pentru 2010 se situeaza la 2 miliarde EUR.

Actiunile Munich Re au scazut astazi cu 0,55%, pana la 108,75 EUR, pret la care compania are o capitalizare bursiera de circa 21,5 miliarde EUR.

BP, cea mai mare companie petroliera din Europa, a anuntat astazi ca profitul pe ultimul trimestru a fost de 4,38 miliarde USD, cu 68% peste profitul din aceeași perioada a anului anterior, dar sub estimarea medie a analistilor, de 4,7 miliarde USD.

CEO-ul Tony Hayward a declarat ca productia va fi mai mica in 2010 decat in 2009, iar marjele de rafinare continua sa se afle la un nivel foarte scazut. Anuntul a dezamagit investitorii, actiunile BP avand cea mai mare scadere zilnica din iunie 2009 pana in prezent, de 3,8%, pana la 572 pence.

Evoluția companiilor din indicele DAX

Name	Change 2010	Change today	P/E	Price/Book Value
DAX INDEX	-4.16%	0.98%	51.8	1.49
INFINEON TECHNOLOGIES AG	11.93%	3.21%	#N/A/N/A	2.02
K+S AG	4.95%	1.94%	23.81	5.44
SIEMENS AG-REG	2.94%	1.61%	22.26	2.15
SAP AG	2.41%	0.63%	21.94	4.83
DEUTSCHE LUFTHANSA-REG	1.96%	1.78%	299.5	0.91
COMMERZBANK AG	0.61%	1.67%	#N/A/N/A	0.65
FRESENIUS MEDICAL CARE AG &	0.51%	1.21%	17.94	2.27
MUENCHENER RUECKVER AG-REG	0.07%	-0.55%	8.39	0.94
HENKEL AG & CO KGAA VORZUG	-0.86%	-0.39%	12.04	2.46
FRESENIUS SE-PREF	-0.95%	-0.12%	27.99	1.97
MERCK KGAA	-1.29%	0.30%	494.77	1.48
BAYERISCHE MOTOREN WERKE AG	-1.97%	0.35%	#N/A/N/A	1.02
ADIDAS AG	-2.10%	-0.24%	25.68	2.19
DEUTSCHE POST AG-REG	-2.52%	2.62%	#N/A/N/A	1.91
SALZGITTER AG	-3.07%	1.28%	#N/A/N/A	0.89
RWE AG	-3.25%	1.18%	17.17	2.75
BASF SE	-3.36%	0.65%	59.74	2.26
LINDE AG	-4.17%	0.59%	23.38	1.63
DEUTSCHE BANK AG-REGISTERED	-5.61%	2.18%	#N/A/N/A	0.84
METRO AG	-5.61%	1.41%	24.2	2.46
ALLIANZ SE-REG	-6.84%	0.87%	8.43	0.93
VOLKSWAGEN AG-PFD	-7.15%	0.69%	14.6	0.69
E.ON AG	-7.24%	1.06%	11.69	1.33
DEUTSCHE TELEKOM AG-REG	-8.26%	0.32%	#N/A/N/A	1.15
BEIERSDORF AG	-8.63%	-0.73%	21.3	4.21
DAIMLER AG-REGISTERED SHARES	-9.31%	0.58%	#N/A/N/A	1.18
MAN SE	-9.65%	1.46%	43.53	1.32
THYSSENKRUPP AG	-9.91%	1.80%	#N/A/N/A	1.39
BAYER AG	-10.65%	0.79%	29.76	2.27
DEUTSCHE BOERSE AG	-15.60%	2.05%	12.21	3.26

- 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
SIE	SIEMENS AG-R	66.10	1.61%	9.83
DBK	DEUTSCHE BAN	46.65	2.18%	6.90
EOAN	E.ON AG	27.12	1.06%	5.86
BAYN	BAYER AG	50.00	0.79%	3.61
RWE	RWE AG	65.75	1.18%	3.59

Lagging 5

Code	Name	Price	% Change	Index Points
MUV2	MUENCHENER R	108.75	-0.55%	-1.31
BEI	BEIERSDORF A	41.97	-0.73%	-0.35
HEN3	HENKEL AG -P	36.12	-0.39%	-0.28
ADS	ADIDAS AG	36.98	-0.24%	-0.21
FRE3	FRESENIUS SE	49.54	-0.12%	-0.05

FTSE

Leading 5

Code	Name	Price	% Change	Index Points
RIO	RIO TINTO PL	3291.00	3.39%	6.40
BLT	BHP BILLITON	1947.00	2.69%	4.37
AAL	ANGLO AMER P	2456.00	3.24%	3.96
BG/	BG GROUP PLC	1188.00	2.24%	3.40
BARC	BARCLAYS PLC	289.65	2.64%	3.29

Lagging 5

Code	Name	Price	% Change	Index Points
BP/	BP PLC	572.00	-3.80%	-16.52
HSBA	HSBC HLDGS P	683.50	-0.51%	-2.36
VOD	VODAFONE GRO	135.35	-0.26%	-0.72
BA/	BAE SYSTEMS	347.10	-1.31%	-0.63
RB/	RECKITT BENC	3233.00	-0.55%	-0.50



WBS HOLDING LTD.

Address: Simmonds Building, 30 De Castro Street,
Wickhams Cay 1, Road Town, Tortola,
British Virgin Islands

Incorporated as International Business Company
on November 3rd, 1997
Registrar of Companies No.: 255210
Authorised Capital: USD 5,000,000

CAC

Leading 5

Code	Name	Price	% Change	Index Points
BNP	BNP PARIBAS	53.88	1.85%	5.42
CS	AXA	15.62	2.93%	4.20
GLE	SOC GENERALE	43.55	2.42%	3.56
SAN	SANOFI-AVENT	53.80	1.07%	3.30
FP	TOTAL SA	42.45	0.60%	2.96

Lagging 5

Code	Name	Price	% Change	Index Points
UG	PEUGEOT SA	23.80	-1.06%	-0.21
UL	UNIBAIL-RODA	158.95	-0.22%	-0.18
EI	ESSILOR INTL	41.95	-0.25%	-0.12
ML	MICHELIN-B	57.91	-0.22%	-0.08
ACA	CREDIT AGRIC	11.64	-0.13%	-0.08

SMI

Leading 5

Code	Name	Price	% Change	Index Points
CSGN	CREDIT SUISS	49.03	2.38%	10.34
NOVN	NOVARTIS AG-	57.70	0.79%	9.23
ROG	ROCHE HLDG-G	180.60	0.78%	8.22
ABBN	ABB LTD-REG	19.90	2.05%	7.77
NESN	NESTLE SA-RE	50.85	0.30%	4.58

Lagging 5

Code	Name	Price	% Change	Index Points
SYNN	SYNGENTA AG-	273.60	-0.51%	-1.11
SYST	SYNTHES INC	136.10	-0.29%	-0.21
SCMN	SWISSCOM AG-	389.40	-0.23%	-0.17
BAER	JULIUS BAER	35.23	-0.17%	-0.10
LONN	LONZA GROUP	77.10	0.33%	0.11