

Jurnal bursier — SUA

22 iunie 2010

Indicii bursieri americani au suferit ieri cele mai mari scaderi din ultimele trei saptamani, pe fondul temerilor ca raliul din ultimele doua saptamani a fost nejustificat de puternic in contextul macroeconomic actual.

Dolarul american s-a intarit fata de moneda Euro, cotația EURUSD ajungand sub nivelul de 1,23. Datele macroeconomice anuntate ieri in SUA au fost de natura sa adanceasca pierderile inregistrate de piata de capital. Datele privind vanzarile de case la mana a doua au aratat ca acestea au scazut in luna mai cu 2,2%, in timp ce analistii anticipau in medie o crestere cu 6%.

Toți indicii sectoriali au inchis sedinta de tranzactionare pe minus, indicii cei mai afectati fiind cel al sectorului energetic (-2,7%), cel industrial (-2,44%) și cel al utilitatilor (-2,47%).

Indicele VIX s-a aflat in crestere puternica, cu circa 9%, dar ramane sub nivelul de 30 de puncte, considerat de investitori ca semnalizand conditii de piata foarte dificile. In ciuda scaderii puternice a pietei de capital, pretul barilului de petrol a pierdut doar 0,97% din valoare, ramand in preajma nivelului de \$78.

| Nume | Preț | Variație (%) | Variație | Variație 2010 (%) |
|---|----------|--------------|----------|-------------------|
| MSCI World Index | 1105.21 | -1.37% | -15.34 | -5.41% |
| Dow Jones | 10293.52 | -1.43% | -148.89 | -1.29% |
| Nasdaq | 1880.54 | -0.81% | -15.30 | 1.09% |
| S&P 500 | 1095.31 | -1.61% | -17.89 | -1.78% |
| Dow Jones Transportation | 4262.68 | -3.86% | -170.92 | 3.98% |
| Dow Jones Utilities | 371.43 | -2.32% | -8.84 | -6.68% |
| S&P Financial Services | 196.29 | -1.51% | -3.01 | 1.30% |
| S&P Energy | 404.86 | -2.70% | -11.25 | -5.83% |
| S&P Telecom | 106.16 | -0.56% | -0.60 | -7.40% |
| S&P Industrials | 254.98 | -2.44% | -6.37 | 4.93% |
| S&P Consumer Discretionary | 248.21 | -2.22% | -5.64 | 5.59% |
| S&P Consumer Staples | 271.52 | -1.04% | -2.85 | -1.01% |
| S&P Utilities | 148.06 | -2.47% | -3.75 | -6.29% |
| S&P Health Care | 338.76 | -0.89% | -3.03 | -6.48% |
| S&P Materials | 184.91 | -2.24% | -4.23 | -7.46% |
| S&P Info tech | 357.61 | -0.91% | -3.30 | -3.53% |
| S&P Metals | 164.71 | -2.53% | -4.28 | -6.54% |
| S&P Integrated Oil & Gas | 388.91 | -2.19% | -8.70 | -4.35% |
| WTI Crude Oil | 77.85 | -0.97% | -0.76 | -6.11% |
| Gold Spot | 1239.90 | 0.51% | 6.25 | 13.18% |
| Jefferies Commodities Index | 262.68 | -0.38% | -1.01 | -7.31% |
| Volatility index (CBOE VIX) | 27.05 | 8.72% | 2.17 | 24.77% |
| Forex | | | | |
| EUR / USD | 1.2271 | -0.33% | -0.0041 | -14.32% |
| USD / CHF | 1.1074 | -0.43% | -0.0048 | 6.97% |
| GBP / USD | 1.4816 | 0.40% | 0.0059 | -8.37% |
| USD / JPY | 90.57 | -0.59% | -0.54 | -2.63% |
| DX Index | 86.1060 | 0.20% | 0.1740 | 10.59% |

Walgreen (NYSE: WAG), cel mai mare lant de farmacii din SUA, a raportat ieri un profit net trimestrial de 47 centi pe actiune, in scadere cu 11% fata de aceeași perioada a anului trecut, pe fondul cheltuielilor cu remodelarea magazinelor. Excluzand chetuielile exceptionale, profitul a fost de 53 centi pe actiune, in timp ce analistii estimau un profit de 58 centi pe actiune. Vanzarile la magazinele deschise de cel puțin un an au crescut cu mai puțin de 1% in ultimul trimestru, iar CEO-ul Greg Wasson a declarat ca activitatea economica slaba si incetinirea aparitiei de noi medicamente generice au avut un efect negativ asupra vanzarilor.

Actiunile WAG au inchis sedinta de ieri in scadere cu 6,54%, pana la \$28,17.

Evoluția companiilor din indicele Dow Jones

| Name | Change this year | Change today | P/E | Price/Book Value |
|-----------------------------|------------------|---------------|--------------|------------------|
| DOW JONES INDUS. AVG | -1.29% | -1.43% | 14.38 | 2.53 |
| BOEING CO | 22.45% | -2.49% | 35.26 | 16.42 |
| CATERPILLAR INC | 12.49% | -2.97% | 30.97 | 4.50 |
| DU PONT (E.I.) DE NEMOURS | 11.23% | -2.24% | 14.46 | 4.38 |
| MCDONALD'S CORP | 9.93% | -1.83% | 16.34 | 5.23 |
| KRAFT FOODS INC-CLASS A | 8.02% | -1.94% | 14.32 | 1.49 |
| WALT DISNEY CO/THE | 6.51% | -2.03% | 17.80 | 1.80 |
| HOME DEPOT INC | 5.81% | -2.61% | 17.59 | 2.66 |
| GENERAL ELECTRIC CO | 4.36% | -1.93% | 14.35 | 1.46 |
| AMERICAN EXPRESS CO | 3.50% | -1.55% | 20.76 | 3.74 |
| BANK OF AMERICA CORP | 3.39% | -1.39% | 23.24 | 0.74 |
| INTEL CORP | 2.79% | -1.04% | 13.80 | 2.71 |
| THE TRAVELERS COMPANIES INC | 2.31% | -0.31% | 8.23 | 0.95 |
| PROCTER & GAMBLE CO | 0.15% | -0.62% | 16.02 | 2.68 |
| INTL BUSINESS MACHINES CORP | -1.22% | -1.03% | 12.60 | 7.53 |
| UNITED TECHNOLOGIES CORP | -2.05% | -1.99% | 14.34 | 3.18 |
| 3M CO | -3.19% | -1.77% | 15.16 | 4.21 |
| MERCK & CO. INC. | -3.86% | 0.03% | 10.52 | 1.89 |
| CHEVRON CORP | -3.88% | -2.27% | 11.03 | 1.56 |
| CISCO SYSTEMS INC | -4.05% | -1.59% | 18.67 | 3.00 |
| WAL-MART STORES INC | -5.18% | -0.67% | 13.44 | 2.85 |
| COCA-COLA CO/THE | -7.96% | -0.04% | 16.45 | 4.86 |
| JPMORGAN CHASE & CO | -8.02% | -1.39% | 12.73 | 0.97 |
| JOHNSON & JOHNSON | -8.15% | 0.05% | 12.70 | 3.08 |
| EXXON MOBIL CORP | -9.17% | -1.88% | 13.89 | 2.59 |
| HEWLETT-PACKARD CO | -9.20% | -1.56% | 11.72 | 2.52 |
| AT&T INC | -9.53% | -0.31% | 11.40 | 1.47 |
| VERIZON COMMUNICATIONS INC | -12.28% | 0.00% | 12.47 | 2.03 |
| MICROSOFT CORP | -15.45% | -0.66% | 13.15 | 4.94 |
| PFIZER INC | -17.70% | -0.86% | 7.03 | 1.35 |
| ALCOA INC | -29.96% | -3.67% | #N/A/N/A | 0.91 |

- raportul Price/Earnings nu este definit pentru companiile care au raportat pierderi în ultimul trimestru („earnings” negativ)
- raportul Price/Book Value nu este definit pentru companiile care au raportat în ultimul trimestru o valoare a datoriilor mai mare decât cea a activelor („book value” negativ)

Companiile americane cu cel mai mare impact asupra indicilor

DOW JONES

Leading 5

| Code | Name | Price | % Change | Index Points |
|------|--------------|-------|----------|--------------|
| JNJ | JOHNSON&JOHN | 59.16 | 0.05% | 0.23 |
| MRK | MERCK & CO | 35.13 | 0.03% | 0.08 |
| VZ | VERIZON COMM | 29.06 | 0.00% | 0.00 |
| KO | COCA-COLA CO | 52.46 | -0.04% | -0.15 |
| T | AT&T INC | 25.36 | -0.31% | -0.61 |

Lagging 5

| Code | Name | Price | % Change | Index Points |
|------|--------------|-------|----------|--------------|
| CAT | CATERPILLAR | 64.11 | -2.97% | -14.81 |
| CVX | CHEVRON CORP | 74.00 | -2.27% | -13.00 |
| BA | BOEING CO | 66.28 | -2.49% | -12.77 |
| MMM | 3M CO | 80.03 | -1.77% | -10.88 |
| UTX | UNITED TECH | 67.99 | -1.99% | -10.43 |

NASDAQ

Leading 5

| Code | Name | Price | % Change | Index Points |
|------|--------------|--------|----------|--------------|
| AAPL | APPLE INC | 273.43 | 1.14% | 4.25 |
| BRCM | BROADCOM COR | 35.66 | 0.39% | 0.06 |
| WCRX | WARNER CHILC | 25.02 | 0.81% | 0.06 |
| GENZ | GENZYME CORP | 53.44 | 0.19% | 0.04 |
| MYL | MYLAN INC | 18.07 | 0.56% | 0.03 |

Lagging 5

| Code | Name | Price | % Change | Index Points |
|------|--------------|-------|----------|--------------|
| SBUX | STARBUCKS CO | 27.23 | -2.82% | -0.89 |
| ESRX | EXPRESS SCRI | 50.20 | -2.92% | -0.80 |
| CSCO | CISCO SYSTEM | 22.98 | -1.54% | -0.80 |
| PCAR | PACCAR INC | 43.02 | -3.28% | -0.65 |
| DTV | DIRECTV-A | 36.55 | -2.25% | -0.59 |



Companiile cu cele mai mari variații zilnice din S&P 500

Leading 5

| Code | Name | Price | % Change |
|------|--------------|--------|----------|
| SVU | SUPERVALU IN | 12.66 | 2.51% |
| KR | KROGER CO | 20.18 | 1.36% |
| AAPL | APPLE INC | 273.43 | 1.14% |
| SLE | SARA LEE COR | 14.84 | 1.09% |
| ALL | ALLSTATE COR | 30.55 | 0.93% |

Lagging 5

| Code | Name | Price | % Change |
|------|--------------|-------|----------|
| BIG | BIG LOTS INC | 31.56 | -7.99% |
| COG | CABOT OIL & | 33.18 | -7.63% |
| IP | INTL PAPER C | 24.35 | -7.45% |
| WAG | WALGREEN CO | 28.17 | -6.54% |
| PXD | PIONEER NATU | 66.97 | -5.72% |