

Jurnal bursier — Europa

31 august 2010

Indicii bursieri europeni au inchis ultima sedinta a lunii august in crestere, pe fondul stirilor macroeconomice pozitive venite din SUA. Totusi, indicii europeni au inregistrat in august cele mai mari scaderi lunare din mai pana in prezent, principalii indicatori macroeconomici semnalizand o slabire a ritmului cresterii economice, atat in Europa, cat si in SUA. Philip Gijssels, seful departamentului de analiza al BNP Paribas Fortis Global Markets, a declarat pentru Bloomberg ca incertitudinea se mentine in piata de capital, investitorii ramanand precauti, in timp ce indicii

si-ar putea continua scaderea inaintea raportului lunar privind piata muncii in SUA, ce va fi publicat vineri. In ciuda cresterilor inregistrate astazi in piata de capital, sectorul bancar a avut o evolutie slaba, dupa ce Raiffeisen International Bank Holding, banca austriaca ce opereaza in 17 tari din Europa de Est, a raportat un profit trimestrial sub estimarile analistilor.

Nume	Valoare	Variație (%)	Variație	Variație 2010 (%)
Europa de Vest				
DAX	5925.22	0.22%	12.81	-0.54%
FTSE	5225.22	0.45%	23.66	-3.47%
CAC 40	3490.79	0.11%	3.78	-11.32%
IBEX Spania	10187.00	0.50%	51.00	-14.68%
AEX Olanda	316.47	0.29%	0.92	-5.62%
SPMIB Italia	19734.57	0.18%	34.91	-15.11%
SMI Elveția	6180.89	-0.39%	-24.35	-5.58%
DJ Euro Stoxx 50	2622.95	0.24%	6.38	-11.54%
DJ Stoxx 600	251.31	0.06%	0.15	-1.02%
Europa de Est				
WIG Polonia	42215.66	0.55%	232.45	5.58%
BUX Ungaria	22561.54	2.70%	592.42	6.29%
PX Cehia	1141.10	-1.18%	-13.60	2.13%
BET România	5072.95	-1.13%	-58.02	8.15%
Forex				
EUR / USD	1.2693	0.24%	0.0030	-11.37%
USD / CHF	1.0174	-0.87%	-0.0089	-1.72%
GBP / USD	1.5342	-0.78%	-0.0120	-5.12%
EUR / JPY	106.74	-0.36%	-0.3900	-19.87%
EUR / GBP	0.8273	1.01%	0.0083	-6.72%
USD / HUF	226.04	0.07%	0.1500	19.60%
EUR / HUF	286.92	0.31%	0.8800	6.11%
USD / PLN	3.1512	-0.16%	-0.0050	10.07%
EUR / PLN	3.9987	0.04%	0.0014	-2.49%
USD / RON	3.3589	0.32%	0.0108	13.69%
EUR / RON	4.2644	0.57%	0.0242	0.79%

Raiffeisen International Bank Holding, banca austriaca ce are expunere pe 17 pietele est-europene, a raportat astazi un profit net trimestrial de trei ori mai mare decat in aceeași perioada a anului anterior, pe fondul scaderii provizioanelor pentru imprumuturi indoielnice. Totusi, profitul net de 71 milioane EUR s-a situat sub estimarea medie a analistilor, de 99 milioane EUR. Imprumuturile neperformante au crescut la 10,4% din portofoliul bancii de la 9,8% in urma cu un trimestru, in timp ce provizioanele au scazut de la 523 milioane EUR la 265 milioane EUR. Actiunile Raiffeisen International au scazut astazi cu 2,4%, pana la 32,25 EUR, pret la care capitalizarea bancii este de circa 4,99 miliarde EUR.

Evoluția companiilor din indicele DAX

Name	Change 2010	Change today	P/E	Price/Book Value
DAX INDEX	-0.54%	0.22%	13.09	1.35
BAYERISCHE MOTOREN WERKE AG	31.02%	1.12%	19.65	1.35
MAN SE	24.71%	0.86%	#N/A/N/A	1.76
FRESENIUS MEDICAL CARE AG & VOLKSWAGEN AG-PFD	20.95%	-0.41%	18.23	2.45
INFINEON TECHNOLOGIES AG	20.18%	0.52%	16.62	0.95
FRESENIUS SE-PREF	13.43%	-0.88%	25.89	1.87
SIEMENS AG-REG	12.26%	0.02%	19.77	1.92
ADIDAS AG	11.79%	0.59%	18.45	2.11
DEUTSCHE LUFTHANSA-REG	6.34%	0.77%	15.51	1.78
LINDE AG	6.00%	-0.60%	#N/A/N/A	0.81
COMMERZBANK AG	5.63%	0.61%	19.08	1.47
MERCK KGAA	5.56%	-0.46%	#N/A/N/A	0.74
SAP AG	5.19%	-0.42%	25.96	1.39
K+S AG	4.41%	-0.56%	20.39	4.57
DAIMLER AG-REGISTERED SHARES	3.23%	-0.39%	29.30	3.04
HENKEL AG & CO KGAA VORZUG	3.04%	0.62%	25.07	1.22
DEUTSCHE TELEKOM AG-REG	1.84%	0.28%	18.55	2.12
DEUTSCHE BANK AG-REGISTERED	0.97%	0.53%	20.38	1.14
BASF SE	0.32%	-0.14%	5.60	0.74
DEUTSCHE POST AG-REG	-4.20%	0.02%	13.13	2.06
METRO AG	-4.30%	-0.23%	9.11	1.55
ALLIANZ SE-REG	-5.63%	0.63%	28.49	2.34
MUENCHENER RUECKVER AG-REG	-7.13%	-0.25%	7.32	0.83
BEIERSDORF AG	-7.24%	0.05%	7.41	0.79
BAYER AG	-8.15%	0.42%	22.09	3.77
DEUTSCHE BOERSE AG	-13.90%	2.43%	24.58	2.10
THYSSENKRUPP AG	-16.86%	-0.65%	20.26	3.10
RWE AG	-18.20%	-0.07%	#N/A/N/A	1.12
E.ON AG	-23.96%	-0.75%	8.34	2.09
SALZGITTER AG	-24.03%	-0.60%	5.30	1.02
	-30.03%	0.47%	#N/A/N/A	0.67

- 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 – companiile cu cele mai mari variații zilnice

Leading 5

Code	Name	Price	% Change
BAYN	BAYER AG	48.18	2.43%
BMW	BAYER MOTORE	41.67	1.12%
MAN	MAN SE	67.89	0.86%
ADS	ADIDAS AG	40.17	0.77%
MEO	METRO AG	40.18	0.63%

Lagging 5

Code	Name	Price	% Change
IFX	INFINEON TEC	4.40	-0.88%
RWE	RWE AG	51.68	-0.75%
DB1	DEUTSCHE BOE	48.22	-0.65%
EOAN	E.ON AG	22.21	-0.60%
LHA	DEUTSCHE LUF	12.46	-0.60%

FTSE

Leading 5

Code	Name	Price	% Change
VOD	VODAFONE GRO	157.15	2.31%
RIO	RIO TINTO PL	3300.00	2.37%
HSBA	HSBC HLDGS P	643.70	1.05%
BLT	BHP BILLITON	1831.50	1.86%
AAL	ANGLO AMER P	2340.00	1.94%

Lagging 5

Code	Name	Price	% Change
BG/	BG GROUP PLC	1049.50	-1.59%
IMT	IMPERIAL TOB	1800.00	-1.59%
GSK	GLAXOSMITHKL	1221.00	-0.37%
CNA	CENTRICA PLC	325.30	-1.21%
AZN	ASTRAZENECA	3228.00	-0.40%

CAC

Leading 5

Code	Name	Price	% Change	Index Points
VIV	VIVENDI	18.41	1.24%	1.44
BNP	BNP PARIBAS	49.37	0.51%	1.39
FP	TOTAL SA	36.87	0.33%	1.39
SGO	SAINT GOBAIN	29.04	1.93%	1.25
RI	PERNOD-RICAR	61.69	1.71%	1.21

Lagging 5

Code	Name	Price	% Change	Index Points
GSZ	GDF SUEZ	24.44	-1.63%	-2.77
SAN	SANOFI-AVENT	45.27	-0.64%	-1.67
ACA	CREDIT AGRIC	9.95	-2.36%	-1.22
CA	CARREFOUR SA	35.83	-0.78%	-0.92
EDF	EDF	31.43	-1.66%	-0.81

SMI

Leading 5

Code	Name	Price	% Change	Index Points
UBSN	UBS AG-REG	17.18	0.59%	2.96
SCMN	SWISSCOM AG-	394.80	0.15%	0.11
NESN	NESTLE SA-RE	52.60	0.00%	0.00
SGSN	SGS SA-REG	1470.00	-0.14%	-0.10
BAER	JULIUS BAER	35.81	-0.28%	-0.17

Lagging 5

Code	Name	Price	% Change	Index Points
NOVN	NOVARTIS AG-	53.35	-0.65%	-7.09
RIGN	TRANSOCEAN L	52.60	-3.40%	-5.12
ROG	ROCHE HLDG-G	138.00	-0.43%	-3.48
CSGN	CREDIT SUISS	44.59	-0.73%	-2.96
ABBN	ABB LTD-REG	19.62	-0.61%	-2.31