

## Jurnal bursier — SUA

7 octombrie 2010

Piata de capital americana a fost influentata ieri de miscarile de pe piata valutara si cea a marfurilor. Astfel, dupa ce datele privind cererile de somaj s-au situat peste estimari, dolarul american s-a depreciat fata de moneda Euro, cotația EURUSD trecand temporar peste nivelul de 1,4. De asemenea, indicele Dow Jones Industrial a depasit pragul de 11.000 puncte pentru prima data in ultimele cinci luni. Totusi, deprecierea dolarului a fost de scurta durata, cotația EURUSD coborand sub nivelul de 1,39 spre finalul sesiunii. Piata marfurilor a evoluat in consecinta: initial, pretul unciei de aur a atins un nou maxim istoric, peste nivelul de

\$1360, dar a pierdut de la maxim circa \$30, inchizand sedinta de ieri in scadere cu 1%. Si pretul barilului de petrol a avut o evolutie asemanatoare, pierzand ieri aproape 2%. Sectorul producatorilor de materii prime a fost printre cele mai afectate de aceste evolutii, actiunile pierzand in medie 0,89% din valoare.

| Nume                        | Preț       | Variație (%) | Variație | Variație 2010 (%) |
|-----------------------------|------------|--------------|----------|-------------------|
| MSCI World Index            | 1206.36    | 0.09%        | 1.03     | 3.24%             |
| Dow Jones                   | 10948.58   | -0.17%       | -19.07   | 4.99%             |
| Nasdaq                      | 2011.63    | 0.25%        | 5.11     | 8.13%             |
| S&P 500                     | 1158.06    | -0.16%       | -1.91    | 3.85%             |
| Dow Jones Transportation    | 4576.64    | -0.15%       | -6.93    | 11.64%            |
| Dow Jones Utilities         | 402.21     | 0.15%        | 0.59     | 1.06%             |
| S&P Financial Services      | 197.42     | -0.43%       | -0.85    | 1.88%             |
| S&P Energy                  | 431.70     | -0.37%       | -1.61    | 0.41%             |
| S&P Telecom                 | 121.17     | -1.19%       | -1.46    | 5.70%             |
| S&P Industrials             | 276.72     | -0.14%       | -0.39    | 13.88%            |
| S&P Consumer Discretionary  | 267.77     | 0.25%        | 0.66     | 13.91%            |
| S&P Consumer Staples        | 290.62     | -0.50%       | -1.47    | 5.95%             |
| S&P Utilities               | 161.13     | 0.11%        | 0.18     | 1.99%             |
| S&P Health Care             | 355.89     | 0.08%        | 0.28     | -1.75%            |
| S&P Materials               | 207.08     | -0.89%       | -1.86    | 3.64%             |
| S&P Info tech               | 370.36     | 0.25%        | 0.94     | -0.09%            |
| S&P Metals                  | 188.67     | -1.99%       | -3.84    | 7.06%             |
| S&P Integrated Oil & Gas    | 412.90     | -0.23%       | -0.97    | 1.55%             |
| WTI Crude Oil               | \$81.67    | -1.87%       | -1.56    | -2.67%            |
| Gold Spot                   | \$1,333.55 | -1.15%       | -15.46   | 21.68%            |
| Jefferies Commodities Index | 287.30     | -0.64%       | -1.85    | 1.38%             |
| Volatility index (CBOE VIX) | 21.56      | 0.33%        | 0.07     | -0.55%            |
| <b>Forex</b>                |            |              |          |                   |
| EUR / USD                   | 1.3926     | -0.03%       | -0.0004  | -2.76%            |
| USD / CHF                   | 0.9663     | 0.49%        | 0.0047   | -6.66%            |
| GBP / USD                   | 1.5878     | -0.08%       | -0.0012  | -1.81%            |
| USD / JPY                   | 82.41      | -0.63%       | -0.52    | -11.41%           |
| DX Index                    | 77.3870    | 0.00%        | 0.0010   | -0.61%            |

## Evoluția companiilor din indicele Dow Jones

| Name                        | Change this year | Change today | P/E    | Price/Book Value |
|-----------------------------|------------------|--------------|--------|------------------|
| <b>DOW JONES INDUS. AVG</b> | 4.99%            | -0.17%       | 14.25  | 2.64             |
| CATERPILLAR INC             | 38.16%           | -0.43%       | 32.27  | 5.40             |
| DU PONT (E.I.) DE NEMOURS   | 37.30%           | 0.78%        | 14.01  | 4.88             |
| BOEING CO                   | 26.47%           | -0.17%       | 44.75  | 16.27            |
| MCDONALD'S CORP             | 21.49%           | 0.40%        | 17.40  | 6.15             |
| KRAFT FOODS INC-CLASS A     | 14.75%           | -0.35%       | 14.85  | 1.63             |
| GENERAL ELECTRIC CO         | 12.69%           | 0.89%        | 15.64  | 1.60             |
| HOME DEPOT INC              | 9.71%            | 0.00%        | 17.44  | 2.72             |
| CHEVRON CORP                | 8.48%            | -0.44%       | 9.75   | 1.69             |
| 3M CO                       | 7.54%            | -1.10%       | 15.85  | 4.54             |
| VERIZON COMMUNICATIONS INC  | 6.38%            | -1.29%       | 14.44  | 2.37             |
| INTL BUSINESS MACHINES CORP | 5.97%            | 0.64%        | 13.15  | 8.31             |
| THE TRAVELERS COMPANIES INC | 5.52%            | -0.40%       | 8.30   | 0.94             |
| WALT DISNEY CO/THE          | 5.15%            | 0.56%        | 16.30  | 1.73             |
| UNITED TECHNOLOGIES CORP    | 4.86%            | -0.12%       | 15.01  | 3.39             |
| COCA-COLA CO/THE            | 4.28%            | -0.60%       | 17.80  | 5.37             |
| WAL-MART STORES INC         | 1.70%            | -0.37%       | 14.08  | 3.07             |
| AT&T INC                    | 0.78%            | -1.29%       | 12.56  | 1.62             |
| MERCK & CO. INC.            | 0.47%            | -0.81%       | 10.89  | 2.05             |
| PROCTER & GAMBLE CO         | 0.28%            | -0.11%       | 16.61  | 2.89             |
| JOHNSON & JOHNSON           | -1.85%           | 0.02%        | 13.39  | 3.29             |
| PFIZER INC                  | -4.45%           | 0.70%        | 7.66   | 1.62             |
| INTEL CORP                  | -4.90%           | 0.47%        | 10.60  | 2.36             |
| JPMORGAN CHASE & CO         | -5.16%           | -0.95%       | 11.62  | 0.96             |
| EXXON MOBIL CORP            | -6.36%           | -0.14%       | 12.23  | 2.32             |
| CISCO SYSTEMS INC           | -6.47%           | 0.40%        | 16.83  | 2.86             |
| AMERICAN EXPRESS CO         | -6.66%           | -0.53%       | 14.55  | 3.13             |
| BANK OF AMERICA CORP        | -11.62%          | -0.60%       | 26.67  | 0.62             |
| MICROSOFT CORP              | -19.55%          | 0.41%        | 11.68  | 4.60             |
| HEWLETT-PACKARD CO          | -20.77%          | 0.17%        | 10.04  | 2.20             |
| ALCOA INC                   | -24.32%          | -1.37%       | 122.00 | 0.99             |

- 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)

## Comaniile americane cu cel mai mare impact asupra indicilor

### DOW JONES

#### Leading 5

| Code | Name         | Price  | % Change | Index Points |
|------|--------------|--------|----------|--------------|
| IBM  | IBM          | 138.72 | 0.64%    | 6.66         |
| DD   | DU PONT (EI) | 46.23  | 0.78%    | 2.73         |
| MCD  | MCDONALDS CO | 75.86  | 0.40%    | 2.27         |
| DIS  | WALT DISNEY  | 33.91  | 0.56%    | 1.44         |
| GE   | GENERAL ELEC | 17.05  | 0.89%    | 1.14         |

#### Lagging 5

| Code | Name         | Price | % Change | Index Points |
|------|--------------|-------|----------|--------------|
| MMM  | 3M CO        | 88.90 | -1.10%   | -7.49        |
| VZ   | VERIZON COMM | 32.93 | -1.29%   | -3.25        |
| JPM  | JPMORGAN CHA | 39.52 | -0.95%   | -2.88        |
| CVX  | CHEVRON CORP | 83.52 | -0.44%   | -2.80        |
| T    | AT&T INC     | 28.25 | -1.29%   | -2.80        |

### NASDAQ

#### Leading 5

| Code | Name         | Price | % Change | Index Points |
|------|--------------|-------|----------|--------------|
| ADBE | ADOBE SYS IN | 28.69 | 11.50%   | 1.67         |
| BMC  | BMC SOFTWARE | 42.32 | 6.73%    | 0.61         |
| GILD | GILEAD SCIEN | 36.26 | 1.43%    | 0.46         |
| INTU | INTUIT INC   | 45.91 | 2.20%    | 0.43         |
| MSFT | MICROSOFT CO | 24.53 | 0.41%    | 0.33         |

#### Lagging 5

| Code | Name         | Price  | % Change | Index Points |
|------|--------------|--------|----------|--------------|
| GOOG | GOOGLE INC-C | 530.01 | -0.81%   | -0.71        |
| ISRG | INTUITIVE SU | 287.16 | -1.95%   | -0.25        |
| QCOM | QUALCOMM INC | 44.55  | -0.22%   | -0.21        |
| YHOO | YAHOO! INC   | 14.23  | -2.00%   | -0.21        |
| ILMN | ILLUMINA INC | 49.39  | -2.74%   | -0.19        |



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

### Leading 5

| Code | Name         | Price | % Change |
|------|--------------|-------|----------|
| ADBE | ADOBE SYS IN | 28.69 | 11.50%   |
| JCP  | J.C. PENNEY  | 31.64 | 9.10%    |
| ANF  | ABERCROMBIE  | 42.03 | 8.91%    |
| BMC  | BMC SOFTWARE | 42.32 | 6.73%    |
| PLD  | PROLOGIS     | 13.00 | 4.67%    |

### Lagging 5

| Code | Name         | Price | % Change |
|------|--------------|-------|----------|
| MAR  | MARRIOTT INT | 35.67 | -5.78%   |
| OI   | OWENS-ILLINO | 27.94 | -4.48%   |
| HOT  | STARWOOD HOT | 53.90 | -2.95%   |
| PEP  | PEPSICO INC  | 66.10 | -2.95%   |
| GPS  | GAP INC/THE  | 18.12 | -2.95%   |