

Compañías Tecnológicas Sufren Revés

El sector tecnológico ha liderado la recuperación de los mercados bursátiles desde el colapso de marzo debido a la pandemia. Sin embargo, durante la semana se dieron ventas masivas en el sector, afectando las valorizaciones de las compañías, a pesar de los datos económico positivos publicados.

Apple sufrió la mayor pérdida diaria de valor en bolsa de la historia, al caer un 8% en la sesión del jueves. Este récord negativo equivale a 180.000 millones, superando a Facebook que perdió 120.000 millones en el 2018 por el escándalo de Cambridge Analytica. A pesar de esto, los analistas afirman que estos movimientos se dan para tomar utilidades y rotar portafolios y no por un cambio de tendencia en el sector.

Datos para la semana con cierre al 4 de sept del 2020

	Ultimo Precio	Δ % Semanal	Δ % YTD	Δ % 3 Meses	Δ % 6 Meses
Dow Jones	27931.02	1.81	-2.13	18.22	-4.99
S&P 500	3372.85	0.64	4.40	18.24	-0.22
Nasdaq	11019.30	0.08	22.81	23.21	13.24
DAX Aleman	12901.34	1.79	-2.62	23.28	-6.40
Nikkei	23289.36	3.89	-1.55	16.23	-0.99
Euro/Dolar	1.1842	0.47	5.61	9.60	9.33
Dolar/Yen	106.60	-0.64	1.89	0.61	2.98
Dolar/Real BR	5.42	0.28	-25.78	7.21	-20.85
Dolar/Peso MX	21.98	1.80	-13.89	8.59	-15.64
Dolar/Peso COL	3789.64	-1.00	-13.26	4.04	-10.48
Petroleo	42.01	1.92	-27.28	42.79	-20.39
Oro	1945.12	-4.44	28.20	12.42	22.79
Volatilidad CBO	22.05	-0.72	60.01	-32.38	61.18

EEUU

El mercado laboral está mostrando una recuperación superior a la esperada, y esto se ha visto reflejado en los datos publicados durante la semana. La tasa de desempleo para el mes de agosto fue 8.4% vs 9.8% que se esperaba. Las nóminas no agrícolas reportaron un aumento de 1.371.000, mientras que las solicitudes del subsidio de desempleo semanal se ubicaron en 881.000 vs 950.000 esperadas.

Entre las industrias que más han aportado a la creación de empleos se destaca el Gobierno Federal con 497.000, artes y deportes 19.100, cine y entretenimiento 13.900 y tiendas de tecnología y accesorios con 20.800. Las industrias textiles, de servicios y viajes continúan con los despidos.

EUROPA

Continúan los reveses en las negociaciones sobre el Brexit entre el Reino Unido y la Unión Europea, esta vez debido a los subsidios que están pagando los británicos. Boris Johnson, primer ministro británico, ordenó a Michael Frost, su principal negociador, terminar las conversaciones con su homólogo del bloque Europeo Michael Barnier. Las críticas hacia Johnson no han tardado, ya que consideran que su postura podría terminar afectando gravemente el mercado bursátil europeo.

Los principales indicadores cerraron la semana en terreno negativo, el FTSE disminuyó 2.76%, el CAC 40 Index 0.76% y el DAX 1.46%

VOLATILIDAD

El índice de volatilidad, VIX, cerró en 30.75 unidades, aumentando en la semana 33.93%.

ASIA

Xi Jinping, presidente de China, anunció el viernes su apoyo a la creación de una zona de libre comercio en la ciudad de Pekín. Este plan tiene como objetivo fortalecer el sector servicios, la economía digital, la innovación científica y tecnológica. Adicionalmente se caracteriza por ser de lista negativa, es decir, no se permitirán inversiones extranjeras y debe estar finalizado para el final del 2020.

Los indicadores cerraron la semana en terreno mixto. El Hang Seng Index disminuyó 2.86%, el Shanghai Composite Index 1.42%, mientras que el Nikkei 225 aumentó 1.41%.

PETROLEO

El WTI cerró en 39.54 USD por barril, presentando una desvalorización semanal de 7.98%.

LA PRÓXIMA SEMANA

Estados Unidos: Ventas de vivienda de segunda mano el viernes.

Europa: Actas de la reunión de política monetaria el jueves.

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Performance returns for time periods longer than 365 days have been annualized.

Any benchmark return calculations included on this report were performed using a cash flow adjusted calculation.

