

El Senado de EEUU No Aprueba el Paquete de Ayuda

El proyecto de ley redactado por republicanos sufrió un revés en la votación del Senado el jueves. Los votos necesarios para alcanzar la aprobación son 60, y la votación del Senado fue 52 – 47 para aprobar el proyecto por 300.000 millones de dólares. Los demócratas exigen un paquete mayor, similar al de principios de año por 3 billones de dólares.

A pesar de las diferencias entre los partidos, existe esperanza en los mercados que las negociaciones lleguen a concretarse favorablemente, ya que el mercado laboral continúa afectado y la aprobación del paquete de estímulo puede afectar el rumbo de las elecciones de noviembre.

Datos para la semana con cierre al 11 de sept del 2020

	Ultimo Precio	Δ % Semanal	Δ % YTD	Δ % 3 Meses	Δ % 6 Meses
Dow Jones	27665.64	-2.22	-3.06	10.10	17.46
S&P 500	3340.97	-3.30	3.41	11.29	21.87
Nasdaq	10853.54	-5.28	20.96	14.34	36.49
DAX Aleman	13202.84	2.80	-0.35	10.30	26.48
Nikkei	23406.49	0.87	-1.06	4.94	34.28
Euro/Dolar	1.1846	0.07	5.65	4.84	5.11
Dolar/Yen	106.16	0.08	2.31	0.67	-1.53
Dolar/Real BR	5.32	-0.33	-24.33	-6.51	-9.39
Dolar/Peso MX	21.28	1.31	-11.04	7.01	0.51
Dolar/Peso COL	3708.04	0.19	-11.35	1.76	4.95
Petroleo	37.39	-9.62	-34.74	1.05	3.46
Oro	1940.55	0.34	27.90	12.32	18.69
Volatilidad CBO	26.87	-20.03	94.99	-34.13	-50.15

EEUU

La semana estuvo marcada por una tendencia bajista en los principales indicadores bursátiles. El sector tecnológico se vio afectado por ventas masivas de administradores de fondos que liquidaron utilidades durante la semana en compañías como Apple (-7.41%), Amazon (-5.41%), Google (-4.14%) y Facebook (-5.70%). El Dow Jones se desvalorizó 2.22%, el S&P 500 Index 3.30% y el Nasdaq 5.28%.

El viernes se conoció el dato de inflación del mes de agosto, que reportó 0.4% vs. el 0.2% del consenso de analistas. Por su parte, el dato de solicitudes iniciales de desempleo fue de 884.000 contra las 846.000 esperadas.

EUROPA

Christine Lagarde, presidenta del Banco Central Europeo, comentó que es necesario mantener los estímulos fiscales para hacer frente a la crisis económica de la Eurozona por el coronavirus. Adicionalmente, el escenario base de crecimiento fue revisado y se espera una contracción de la economía del 8% vs. el 8.7% que se esperaba en junio. El BCE mantuvo sus tipos de interés inalterados y en mínimos históricos. La tasa del Banco Central se mantiene en 0%, mientras que la tasa de depósito se mantiene en -0.50%.

Los principales indicadores cerraron la semana en terreno positivo, el FTSE aumentó 4.02%, el CAC 40 Index 1.39% y el DAX 2.80%.

VOLATILIDAD

El índice de volatilidad, VIX, cerró en 26.87 unidades, disminuyendo en la semana 20.03%.

ASIA

Continúan las tensiones entre China y Estados Unidos por la venta de Tik Tok. Donald Trump, dio un ultimátum para que la aplicación asiática fuese vendida a una compañía estadounidense, de lo contrario prohibiría su uso en el territorio americano a partir de mediados de septiembre. ByteDance, propietaria de la aplicación, mantuvo negociaciones con Microsoft y Oracle, sin embargo, se conoció el viernes que China prefiere eliminar la aplicación en Estados Unidos antes de venderla de una manera forzada.

Los indicadores cerraron la semana en terreno mixto. El Hang Seng Index disminuyó 0.78%, el Shanghai Composite Index 2.83%, mientras que el Nikkei 225 aumentó 0.87%.

PETROLEO

El WTI cerró en 37.39 USD por barril, presentando una desvalorización semanal de 9.62%.

LA PRÓXIMA SEMANA

Estados Unidos: Decisión tipos de interés el miércoles.

Europa: IPC Zona Euro 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.

