

Demócratas Preparan Nuevo Paquete de Estímulo

El partido demócrata está preparando otro paquete de estímulo que costaría alrededor de \$2.4 trillones. Este incluiría un aumento en el monto de los subsidios de desempleo, pagos directo a americanos, préstamos a empresas pequeñas, ayuda a aerolíneas, entre otros. Las expectativas de llegar a un acuerdo son altas, ya que los demócratas disminuyeron el paquete por casi un trillón. Se espera que se reinicien las negociaciones y votaciones esta semana.

El paquete es esperado ansiosamente ya que Jerome Powell (Presidente de la Reserva Federal), entre otros expertos económicos, advirtió que la economía podría verse afectada sin más estímulos fiscales. También reiteró que está listo para ayudar una vez el gobierno llegue a un acuerdo.

Datos para la semana con cierre al 25 de sept del 2020

	Ultimo Precio	Δ % Semanal	Δ % YTD	Δ % 3 Meses	Δ % 6 Meses
Dow Jones	27173.96	-1.75	-4.78	5.55	28.18
S&P 500	3298.46	-0.63	2.09	6.96	33.24
Nasdaq	10913.56	1.11	21.63	8.95	47.79
DAX Aleman	12469.20	-4.93	-5.89	2.39	26.28
Nikkei	23204.62	-1.15	-1.91	3.08	19.68
Euro/Dolar	1.1631	-1.77	3.73	3.68	6.88
Dolar/Yen	105.59	-0.97	2.86	1.52	5.32
Dolar/Real BR	5.56	-2.98	-27.55	-3.47	-9.33
Dolar/Peso MX	22.36	-5.50	-15.36	1.33	7.00
Dolar/Peso COL	3887.15	-3.93	-15.43	-3.98	4.50
Petroleo	40.10	-2.95	-29.46	2.14	22.14
Oro	1860.79	-4.62	22.64	5.50	15.08
Volatilidad CBO	26.38	2.13	91.44	-18.13	-58.75

EEUU

La confianza del consumidor en el mes de septiembre fue del 0.4%, mucho menos que el 1.2% pronosticado. Las nuevas peticiones de subsidio de desempleo también defraudaron las expectativas al llegar a 870.000 mientras el consenso de analistas esperaba 840.000. Estas cifras, unidas a las tensiones de la elección presidencial han causado una gran volatilidad en el mercado esta semana.

Por otro lado, Donald Trump se negó a comprometerse a un traslado de poder pacífico en caso tal de perder las elecciones en noviembre. También manifestó su inconformidad con los formatos de votación para las elecciones. Biden sigue liderando las encuestas antes del primer debate presidencial del martes.

EUROPA

La segunda ola del coronavirus en gran parte de Europa ya es una realidad. Muchos gobiernos están anunciando nuevas medidas de restricción, o desacelerando la reapertura, ya que se ha presentado un significativo aumento de casos. Datos de esta semana muestran que la recuperación se ha estancado, el PMI manufacturero reportó 50.1, el Flash Composite Index de Inglaterra llegó a 55.7 para septiembre, siendo el más bajo en tres meses. El primer ministro, Boris Johnson, ha dicho que su país se encuentra en un punto muy crítico, y ha tomado medidas de restricciones para combatir la segunda ola del virus.

Los principales indicadores cerraron la semana en terreno negativo, el FTSE disminuyó 2.74%, el CAC 40 Index 4.99 % y el DAX 4.93%.

VOLATILIDAD

El índice de volatilidad, VIX, cerró en 26.38 unidades, aumentando en la semana 2.13 %.

ASIA

El nuevo Primer Ministro de Japón, Yoshihide Suga, acordó mantener la coordinación de políticas económicas y monetarias con el Banco de Japón, consistente en una cuantiosa inversión pública, flexibilización monetaria a gran escala y estabilidad en tasas de interés, que actualmente se ubican en -0.10%. Por otro lado, la tasa de préstamo preferencial de china se mantuvo en 3.85%.

Los indicadores cerraron la semana en terreno negativo. El Hang Seng Index disminuyó 4.99%, el Nikkei 225 Index 0.67%, y el Shanghái Composite Index 3.56 %.

PETROLEO

El WTI cerró en 40.10 USD por barril, presentando una desvalorización semanal de 2.95%.

LA PRÓXIMA SEMANA

Estados Unidos: Tasa de desempleo el viernes.

Europa: IPC Zona Euro el miércoles.



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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.

