

Bancos de Estados Unidos Presentan Resultados

Los resultados trimestrales de los principales bancos de Estados Unidos reportaron utilidades en terreno mixto. La temporada de reportes la comenzaron JP Morgan y Citigroup, ambas superaron las previsiones de los analistas, aunque advirtieron sobre un aumento en los impagos debido a los impactos de la pandemia. JP Morgan reportó ganancias de 9.44 billones de dólares, impulsado en gran parte por resultados positivos en trading.

Goldman Sachs también superó las expectativas de los analistas, principalmente por la reactivación de asesorías para acuerdos financieros. En contraste, las acciones de Bank of America y Wells Fargo se vieron afectadas luego de reportar una caída de doble dígito en sus utilidades durante el tercer trimestre, pese a que generaron más ingresos de los esperados por el mercado.

Datos para la semana con cierre al 16 de oct del 2020

	Ultimo Precio	Δ % Semanal	Δ % YTD	Δ % 3 Meses	Δ % 6 Meses
Dow Jones	28606.31	0.07	0.24	7.25	18.00
S&P 500	3483.81	0.19	7.83	8.03	21.19
Nasdaq	11671.56	0.79	30.08	11.12	34.93
DAX Aleman	12908.99	-1.09	-2.57	-0.08	21.49
Nikkei	23410.63	-0.89	-1.04	3.15	17.66
Euro/Dolar	1.1718	-0.91	4.50	2.93	8.10
Dolar/Yen	105.40	0.21	3.05	1.77	2.39
Dolar/Real BR	5.65	-2.02	-28.71	-5.56	-7.26
Dolar/Peso MX	21.14	0.00	-10.46	6.19	13.66
Dolar/Peso COL	3849.46	-0.59	-14.61	-5.38	3.35
Petroleo	40.88	0.69	-28.09	-0.87	23.62
Oro	1899.29	-1.61	25.18	5.68	10.57
Volatilidad CBO	27.41	3.98	98.91	6.74	-28.15

EEUU

Las negociaciones para el paquete de estímulo continúan generando volatilidad en el mercado. Mnuchin comentó el jueves que cederán en los presupuestos para las pruebas del coronavirus. Adicionalmente, el presidente Trump se mostró a favor de aumentar su oferta previa de \$1.8 trillones acercándose aún más a la propuesta por los demócratas en \$2.2 trillones.

Por otro lado, las solicitudes iniciales de desempleo reportaron resultados peores a los esperados por el mercado, registrando 898.000 vs. 830.000 esperadas. Esta cifra representa la más alta registrada en Estados Unidos desde finales de agosto, y muestra las dificultades que aún existen en el mercado laboral.

EUROPA

La segunda ola del coronavirus ya está impactando a los países europeos. El Reino Unido anunció medidas preventivas, introduciendo tres niveles de alerta para desacelerar la curva de contagio. En la ciudad de Liverpool, los negocios y residentes fueron obligados a un nuevo cierre obligatorio ya que fueron calificados como nivel tres de alerta. Estas medidas son alarmantes para la economía que actualmente se encuentra en una lenta recuperación.

Los principales indicadores cerraron la semana en terreno negativo, el FTSE disminuyó 1.61%, el CAC 40 Index 0.22 % y el DAX 1.09%.

VOLATILIDAD

El índice de volatilidad, VIX, cerró en 27.41 unidades, aumentando en la semana 3.98 %.

ASIA

La administración del presidente Donald Trump impidió la adquisición de una clínica de fertilidad americana por parte de una entidad china. Esta medida se debe a la preocupación por parte del gobierno estadounidense sobre el manejo que la empresa asiática podía dar a los datos médicos de la clínica ubicada en San Diego. Este es un nuevo caso que debilita aún más las relaciones entre ambos países.

Los indicadores cerraron la semana en terreno mixto. El Hang Seng Index aumentó 1.11%, el Shanghai Composite Index 1.96 %, mientras que el Nikkei 225 Index disminuyó 0.89%.

PETROLEO

El WTI cerró en 40.88 USD por barril, presentando una valorización semanal de 0.69%.

LA PRÓXIMA SEMANA

Estados Unidos: Declaraciones Powell, Presidente FED, el lunes.

Europa: Declaraciones Lagarde, Presidenta BCE, el lunes.



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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.

