Pulso Bursátil

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LABORATORIO
MERCADO
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MILA

Perú: The General Index of the BVL closed today's session with a positive result of +0.74%. The index maintains an annual cumulative negative trend of -12.92% in local currency, while the adjusted yield in dollars amounts to -19.64%. Then, the S&P / BVL Peru SEL varied by +0.78% while the S&P / BVL LIMA 25 by +0.59%. The PEN spot reached S / 3.5910. Headline: Moody's downgrades its outlook for the Peruvian banking system to negative.

Chile: The IPSA index closed the day with a positive return +0.18%. The index maintains an annual cumulative negative trend of -23.01% in local currency, while the adjusted yield in dollars amounts to -26.19%. The CLP spot reached $ 784.6000. Headline: Chile launches subsidies for US $ 2,000M to recover and create jobs lost due to the coronavirus.

Colombia: The COLCAP index closed the day with a positive return +0.45%. The index maintains an annual cumulative negative trend of -29.22% in local currency, while the adjusted yield in dollars amounts to -39.92%. The COP spot reached $ 3873.0000. Headline: Colombia's economic recovery can take between 2 and 5.2 years.

México: The MEXBOL index closed the day with a positive return +1.77%. The index maintains an annual cumulative negative trend of -14.49% in local currency, while the adjusted yield in dollars amounts to -27.64%. The COP spot reached $ 22.3600. Headline: Mexico recovers 1.9 million full-time jobs in August.

Global Overview

Asia: Asian markets mostly closed higher today amid optimism over China's industrial earnings data that raised hopes for a recovery. Regarding the Trade War, US government restricted exports to China's largest silicon chip maker, and now it will have to apply for individual export licenses. In Chinese markets, investors are taking positions in mutual funds that will allocate up to 10% of the money for shares of the upcoming Ant Group IPO, underscoring the strong demand for tech stocks. On its side, Japanese markets closed higher after a greater appetite for ex-dividend stocks this week. Also, Japanese government bond prices fell as higher stocks reduce demand for safe-haven debt. Similarly, Japan's Nikkei 500 hit a new record, gaining + 7.7% year-to-date, and outperforming the US S&P 500. In individual stocks, South Korean chipmakers Samsung Electronics (+ 1.14 %) and DB Hitek (+ 8.90%) increased, trying to take advantage of the new US export restrictions on China's SMIC. Thus, the Nikkei 225 + 1.32%, Kospi + 1.29%, Hang Seng + 1.04%, Shanghai Composite -0.06%, Shenzhen -0.76%, among other indexes, closed mostly higher.

Europe: European markets closed today's session with positive returns, partially recovering from last week's losses, thanks to an increase in profits from China's industrial companies, which resulted in an increase of more than +3.50% in European automotive and industrial sectors that are strongly correlated with Chinese demand. Likewise, the recovery of the banking sector was led by HSBC Holdings +8.89%, as there was an increase in the participation of the largest shareholder of the British bank, Ping An Insurance, from 7.95% to 8.00%, and also by Commerzbank + 5.60% after announcing Manfred Knof as the new CEO, which was a senior manager from his rival, Deustche Bank +7.35% who also had a significant performance. On the other hand, the steel and mining company ArcelorMittal rose +10.92% after reaching an agreement to sell its US operations to the mining company Cleveland-Cliffs +11.56% which amounts to 3.3 billion dollars, including liabilities assumed. The company with the highest performance of the Stoxx 600 in today's session is Sonova Holding AG, with an increase of + 14.38%, after recovering the optimism of the income they will grow again in the coming months. For today's close, the main indexes Stoxx 600 +2.22%, FTSE 100 +1.46%, CAC 40 +2.40% and DAX +3.22% finished higher.

United States: The US markets closed today's session in positive territory as new deals were reported on the M&A front and hopes of reaching a stimulus deal were raised. Stocks opened the week with huge gains on investor optimism over the latest market developments. On the one hand, House Speaker Nancy Pelosi commented over the weekend that a last-minute COVID-19 support program is still on the table, as House Democrats try to continue with a package of minor support with an approximate cost of US $ 2.4 trillion. In addition, she indicated that she and Steven Mnuchin, Treasury Secretary, would speak today. However, the aforementioned figure exceeds what the Republican leadership indicated it would support for the next package. On the corporate deal front, Devon Energy and WPX Energy reported that they will continue with a merger of equals, with an effect on shares of + 11.1% and +16.4%, respectively. Similarly, Caesars Entertainment + 2% released a £ 2.9 billion cash offer to acquire William Hill. Thus, the S&P 500 + 1.61%, DJIA + 1.51% and NASDAQ + 1.87% closed positive.

Major Market Indexes Day Performance

1) América	RMI	2días	Valor	Var neta	Var%	Hora	%Ytd	%YtdDiv
11) DOW JONES			27584.06	+410.10	+1.51%	09/28 c	-3.34%	-3.34%
12) S&P 500			3351.60 d	+53.14	+1.61%	09/28 c	+3.74%	+3.74%
13) NASDAQ			11117.53	+203.96	+1.87%	09/28 c	+23.91%	+23.91%
14) S&P/TSX Comp			16242.81 d	+177.46	+1.10%	09/28 c	-4.81%	-7.48%
15) S&P/BMV IPC			37231.50 d	+647.79	+1.77%	16:16 c	-14.49%	-27.64%
16) IBOVESPA			94666.37 d	-2333.02	-2.41%	16:20 c	-18.14%	-41.80%
17) CHILE SLCT			3595.39 d	+6.35	+0.18%	09/28 c	-23.01%	-26.19%
18) Colom COLCAP			1176.66 d	+5.31	+0.45%	16:00 c	-29.22%	-39.92%
19) ARG MERVAL			42077.91 d	+35.46	+0.08%	16:20 c	+0.98%	-20.51%
20) S&P/BVL Peru			17875.08 d	+131.20	+0.74%	09/28 c	-12.92%	-19.64%
2) EMEA								
21) Euro Stoxx 50			3223.19 d	+86.13	+2.75%	09/28 c	-13.94%	-10.35%
22) FTSE 100			5927.93 d	+85.26	+1.46%	09/28 c	-21.41%	-23.69%
23) CAC 40			4843.27 d	+113.61	+2.40%	09/28 c	-18.98%	-15.60%
24) DAX			12870.87 d	+401.67	+3.22%	09/28 c	-2.85%	+1.20%
3) Asia/Pacífico								
31) NIKKEI			23378.61 d	-133.01	-0.57%	20:03	-1.18%	+1.81%
32) HANG SENG			23476.05 d	+240.63	+1.04%	09/28 c	-16.72%	-16.28%
33) CSI 300			4581.91 d	+11.89	+0.26%	09/28 c	+11.85%	+14.34%
34) S&P/ASX 200			5983.30	+30.99	+0.52%	20:23	-10.48%	-9.54%

Source: Bloomberg

Main Commodities Day Performance

Materia prima	2días	Prec	Var reg	Cmb%	Hora	%YTD	DivYTD%
1) Energía							
2) Crudo WTI NYM		40.58	-0.02	-0.05%	20:14	-33.54%	-33.54%
3) Crudo Brent ICE		42.44	+0.01	+0.02%	20:14	-35.70%	-35.70%
4) Gasóleo ARA ICE		332.50	+2.25	+0.68%	20:02	-45.85%	-45.85%
5) Gasolina NYH NYM		125.03	+0.37	+0.30%	20:14	-26.36%	-26.36%
6) Petr calefac NHY NYM		114.13	+0.18	+0.16%	18:15	-43.73%	-43.73%
7) Gas nat HH NYM		2.78	-0.02	-0.64%	20:14	+26.86%	+26.86%
8) Gas natural NBP ICE		34.02	+2.11	+6.61%	09/28/20	+9.49%	+6.33%
9) Metales							
10) Aluminio LME		1,775.00	+26.50	+1.52%	09/28/20	-1.93%	-1.93%
11) Cobre LME		6,572.00	+27.00	+0.41%	09/28/20	+6.45%	+6.45%
12) Oro al contado		1,885.78	+4.30	+0.23%	20:24	+24.29%	+24.29%
13) Mineral de hierro DCE		769.50	+0.00	+0.00%	11:00	+32.01%	+34.96%
14) Níquel LME		14,504.00	+240.00	+1.68%	09/28/20	+3.42%	+3.42%
15) Plata al contado		23.81	+0.14	+0.58%	20:24	+33.39%	+33.39%
16) Barrotes acero SHF		3,515.00	-16.00	-0.45%	11:00	-4.93%	-2.80%
17) Agricultura							
18) Ganado CME		111.65	+0.25	+0.22%	09/28/20	-13.43%	-13.43%
19) Café ICE		109.55	-4.10	-3.61%	09/28/20	-15.54%	-15.54%
20) Maíz CBT		366.75	+0.00	+0.00%	20:14	-5.42%	-5.42%
21) Algodón ICE		65.69	-0.26	-0.39%	09/28/20	-6.73%	-6.73%
22) Soja CBT		997.00	+0.75	+0.08%	20:14	+5.73%	+5.73%
23) Azúcar ICE		13.05	-0.46	-3.40%	09/28/20	-6.18%	-6.18%
24) Trigo SRW CBT		549.25	-1.00	-0.18%	20:14	-1.70%	-1.70%

Source: Bloomberg

Main Macro-indicators Day Performance

Mayor aumento

Índices bursátiles	Forex	Bonos soberanos	Materias primas	CDS soberano
Luxemburgo LuxX +5.03 % 1038.079 c +49.734	Dólar taiwanés +0.19 % 29.220 c -0.056	Rusia 2A -1.0 bp 4.390	Zinc SHF +2.11 % 19315 d +400	CDS de Dinamarca -0.46 bp 9.20 c
BUX de Hungría +3.81 % 33150.26 c +1217.0	Shequel israelí +0.43 % 3.4636 c -0.0151	Indonesia (USD) 5Y -0.8 bp ↓ 1.258	Aluminio SHF +1.68 % 14210 d +235	Australia CDS -0.75 bp 17.69 c
Polonia WIG +3.20 % 49841.68 c +1546.9	Won sudcoreano +0.30 % ↓ 1169.95 -3.55	Japón 30A -0.3 bp 0.604	Gas nat RU +6.61 % 34.020 c +2.110	CDS de Corea del Sur -0.92 bp 27.17 c
Bélgica 20 +3.06 % 3260.42 c +96.75	Ringgit malayo +0.18 % 4.1675 -0.0075	Philippines (USD) 1... -0.6 bp 2.066	Gas nat TTF EDX +5.88 % 12.352 c +0.686	CDS de Indonesia -3.72 bp 116.32 c

Mayor caída

Índices bursátiles	Forex	Bonos soberanos	Materias primas	CDS soberano
IBOV de Brasil -2.41 % 94666.4 c -2333.0	Peso argentino -0.28 % 76.0575 c +0.2130	Indonesia (USD) 2Y +3.5 bp ↑ 0.884	Azúcar NYB -3.40 % 13.05 c -0.46	CDS de Hungría +1.67 bp 63.97 c
Israel TA-35 -0.98 % 1275.23 c -12.57	Real brasileño -1.77 % 5.6613 c +0.0985	Japón 2A +0.7 bp ↑ -0.158	Café ICE -2.28 % 1327 c -31	CDS de Italia +1.41 bp 135.76 c
Japón Nikkei -0.60 % ↑ 23369.81 d -141.81	Rupia india -0.23 % 73.7850 c +0.1725	Australia 2A +0.4 bp ↑ 0.145	Café NYB -3.61 % 109.55 c -4.10	CDS de Turquía +4.05 bp 547.35 c
JCI de Indonesia -0.79 % 4906.548 c -39.243	NDF de won sudcore... -0.20 % ↓ 1169.97 +2.39	Nueva Zelanda 2A +0.7 bp -0.062	Acero SHF -0.45 % 3515 d -16	Austria CDS +0.12 bp 9.85 c

Legend:

- > 5.0 (Atípico)
- 3.0 to 5.0 (Atípico)
- 2.0 to 3.0
- 1.0 to 2.0
- 0.2 to 1.0
- -0.2 to 0.2
- -0.2 to -1.0
- -1.0 to -2.0
- -2.0 to -3.0
- -3.0 to -5.0 (Atípico)
- < -5.0 (Atípico)

Source: Bloomberg