

Pulso Bursátil

14/09/20



Capital Market Laboratory Coordinator: Economist Bruno Bellido
Collaboration: Piero Best, Alonso Hernández, Luis Davila and Laura Delgado
Email: pulsobursatil@ulima.edu.pe
Facebook: www.facebook.com/pulsobursatil.ul

The content of this document is just for informational purposes. The information and opinions expressed should not be considered as recommendations for future decisions. Under any circumstances, the Capital Market Laboratory of University of Lima will be responsible for the use of the statements in this document

MILA

Perú: The General Index of the BVL closed today's session with a positive result of +0.76%. The index maintains an annual cumulative negative trend of -11.51% in local currency, while the adjusted yield in dollars amounts to -17.70%. Then, the S&P / BVL Peru SEL varied by +0.71% while the S&P / BVL LIMA 25 by +0.86%. The PEN spot reached S / 3.5650. Headline: Peru's country risk remains stable and closed at 1.27 percentage points.

Chile: The IPSA index closed the day with a negative return -0.08%. The index maintains an annual cumulative negative trend of -20.56% in local currency, while the adjusted yield in dollars amounts to -21.71%. The CLP spot reached \$ 765.3000. Headline: CCS's research report spots Chile as the third country with the highest job losses in the world.

Colombia: The COLCAP index closed the day with a negative return -1.06%. The index maintains an annual cumulative negative trend of -27.84% in local currency, while the adjusted yield in dollars amounts to -35.73%. The COP spot reached \$ 3688.6700. Headline: Colombia's industrial production falls 8.5% in July and retail sales are down 12.4%.

México: The MEXBOL index closed the day with a positive return +1.51%. The index maintains an annual cumulative negative trend of -15.29% in local currency, while the adjusted yield in dollars amounts to -23.95%. The MXN spot reached \$ 21.0800. Headline: Mexico recovered in August more than 92,000 formal jobs lost in the pandemic.

Global Overview

Asia: Asian markets closed today's session with positive results, while investors are awaiting the last meeting on monetary policy, that the Fed will hold before the presidential election. On the Chinese stock exchange, the Shanghai STAR Market led the gains after the securities regulator approved the first batch of exchange-traded funds (ETFs), which is expected to attract new funds to the market. Thus, the STAR50 index, focused on Shanghai technology, rose 2.7%, while the ChiNext Composite index of emerging companies rose 1.4%. Similarly, Japan's stocks closed stronger after the new Prime Minister, Yoshihide Suga, was met. On the same line, South Korean stocks hit a one-month high, influenced by gains in Samsung Electronics (+ 3.1%) and strong foreign investment (\$ 120.64 million). In addition, when it comes to individual shares, the Japanese technology conglomerate Softbank soared 9% after announcing that it has reached an agreement with the American Nvidia to sell, for about 40,000 million dollars, the chip and software development firm, Arm Limited. In this way, the Nikkei 225 + 0.65%, Hang Seng + 0.56%, ASX 200 + 0.68%, Kospi + 1.30%, CSI 300 + 0.51% and Shanghai Composite + 0.57% closed with positive results.

The content of this document is just for informational purposes. The information and opinions expressed should not be considered as recommendations for future decisions. Under any circumstances, the Capital Market Laboratory of University of Lima will be responsible for the use of the statements in this document

Europe: European markets closed today's session with polarized returns. At the opening there was an increase of +0.70% in the Stoxx 600 index, given by the restart of clinical tests by AstraZeneca -0.37% and mergers and acquisitions by the technological sector that overshadowed the altered Brexit. However, optimism depreciated with increased restrictions in the health care sector and losses accumulated in the oil sector, Royal Dutch Shell -1.68%, BP.L -1.89%, as a drop in the forecast of the demand of crude oil was worse than expected. The shares of the airline sector helped to amortize the fall with an increase of International Consolidated Airlines Group +4.40%, easyJet PLC + 1.72% and Deutsche Lufthansa AG + 2.05%; in addition of the tech sector provided by STMicroelectronics N.V. +3.74% and ASM International N.V. +3.08%. Regarding corporate actions, the British cybersecurity company G4S PLC had an increase of +25.05% and the French manufacturer of aerial parts Dassault Aviation S.A. it remained with a yield of +9.13%. For today's close, the main indices Stoxx 600 +0.15%, FTSE 100 -0.10%, CAC 40 +0.35% and DAX - 0.07% closed with a mixed result.

United States: The US markets closed trading with positive returns, amid major deals on the corporate front that lifted market sentiment. Investor sentiment improved thanks to a series of acquisitions announced during the session. First, graphics processor maker Nvidia offered \$ 40 billion for Softbank's Arm Holdings, a maker of mobile phone chips. Financing will be done with a combination of cash and ordinary shares. Regarding the acquisition of Tiktok, disputes continue. This time, Oracle beat Microsoft, after ByteDance did not accept Microsoft's offer, making Oracle their technology partner, with great expectations in the video platform. Another notable deal is that of Gilead Sciences, when it reported the acquisition of Immunomedics, a biotechnology company, for US \$ 21 billion (88 per share in cash). The goal is to expand their cancer treatments. In individual stocks, the technology sector showed signs of recovery: Tesla + 12.58% and Apple + 3%. Likewise, Nvidia + 5.82%, Skyworks Solutions + 1.2% and Micron + 6.38%. Lastly, Gilead + 2.22%, Immunomedics + 97.99% and Oracle + 4.32%. Thus, the S&P 500 + 1.27%, DJIA + 1.18% and NASDAQ + 1.87% closed higher.

Major Market Indexes Day Performance

	RMI	2dfas	Valor	Var neta	Var%	Hora	%Ytd	%YtdDiv
1) América								
11) DOW JONES			27993.33	+327.69	+1.18%	09/14 c	-1.91%	-1.91%
12) S&P 500			3383.54 d	+42.57	+1.27%	09/14 c	+4.73%	+4.73%
13) NASDAQ			11056.65	+203.11	+1.87%	17:22 c	+23.23%	+23.23%
14) S&P/TSX Comp			16360.14 d	+137.68	+0.85%	09/14 c	-4.12%	-5.48%
15) S&P/BMV IPC			36881.99 d	+547.09	+1.51%	09:29 c	-15.29%	-23.95%
16) IBOVESPA			100274.52 d	+1911.30	+1.94%	16:18 c	-13.29%	-33.81%
17) CHILE SLCT			3709.84 d	-2.83	-0.08%	15:41 c	-20.56%	-21.71%
18) Colom COLCAP			1199.65 d	-12.80	-1.06%	16:00 c	-27.84%	-35.73%
19) ARG Merval			44614.08 d	-1225.91	-2.67%	16:20 c	+7.06%	-14.66%
20) S&P/BVL Peru			18163.49	+137.55	+0.76%	09/14 c	-11.51%	-17.70%
2) EMEA								
21) Euro Stoxx 50			3316.79 d	+0.98	+0.03%	11:50 c	-11.44%	-6.27%
22) FTSE 100			6026.25 d	-5.84	-0.10%	09/14 c	-20.10%	-22.57%
23) CAC 40			5051.88 d	+17.74	+0.35%	09/14 c	-15.49%	-10.56%
24) DAX			13193.66 d	-9.18	-0.07%	09/14 c	-0.42%	+5.40%
3) Asia/Pacífico								
31) NIKKEI			23559.30 d	+152.81	+0.65%	09/14 c	-0.41%	+2.32%
32) HANG SENG			24640.28 d	+136.97	+0.56%	09/14 c	-12.59%	-12.13%
33) CSI 300			4651.05 d	+23.77	+0.51%	09/14 c	+13.53%	+16.08%
34) S&P/ASX 200			5899.52	+40.10	+0.68%	09/14 c	-11.74%	-8.27%

Source: Bloomberg

Main Commodities Day Performance

Materia prima	2dfas	Prec	Var reg	Cmb%	Hora	%YTD	DivYTD%
1) Energía							
2) Crudo WTI NYM		37.26	-0.07	-0.19%	09/14/20	-38.98%	-38.98%
3) Crudo Brent ICE		39.71	+0.10	+0.25%	17:58	-39.83%	-39.83%
4) Gasóleo ARA ICE		321.50	-2.50	-0.77%	17:47	-47.64%	-47.64%
5) Gasolina NYH NYM		110.68	+1.19	+1.09%	09/14/20	-34.81%	-34.81%
6) Petr calefac NHY NYM		109.34	+0.38	+0.35%	09/14/20	-46.09%	-46.09%
7) Gas nat HH NYM		2.31	+0.04	+1.81%	09/14/20	+5.53%	+5.53%
8) Gas natural NBP ICE		28.38	+0.60	+2.16%	09/14/20	-8.66%	-11.47%
9) Metales							
10) Aluminio LME		1,775.00	-14.50	-0.81%	09/11/20	-1.93%	-1.93%
11) Cobre LME		6,739.00	+70.50	+1.06%	09/11/20	+9.15%	+9.15%
12) Oro al contado		1,957.48	+0.62	+0.03%	18:08	+29.01%	+29.01%
13) Mineral de hierro DCE		845.00	+2.50	+0.30%	11:00	+34.46%	+37.48%
14) Níquel LME		15,094.00	+262.00	+1.77%	09/11/20	+7.62%	+7.62%
15) Plata al contado		27.14	+0.02	+0.07%	18:08	+52.04%	+52.04%
16) Barrotes acero SHF		3,666.00	+5.00	+0.14%	11:00	+1.37%	+3.64%
17) Agricultura							
18) Ganado CME		111.70	+1.80	+1.64%	09/14/20	-14.29%	-14.29%
19) Café ICE		123.05	-9.40	-7.10%	09/14/20	-4.74%	-4.74%
20) Maíz CBT		369.50	+1.00	+0.27%	09/14/20	-4.71%	-4.71%
21) Algodón ICE		66.62	+1.81	+2.79%	09/14/20	-5.20%	-5.20%
22) Soja CBT		999.50	+3.50	+0.35%	09/14/20	+5.99%	+5.99%
23) Azúcar ICE		12.50	-0.10	-0.79%	09/14/20	-12.37%	-12.37%
24) Trigo SRW CBT		545.75	+3.75	+0.69%	09/14/20	-2.33%	-2.33%

Source: Bloomberg

The content of this document is just for informational purposes. The information and opinions expressed should not be consider as recommendations for future decisions. Under any circumstances, the Capital Market Laboratory of University of Lima will be responsible for the use of the statements in this document

Main Macro-indicators Day Performance

Mayor aumento				
Índices bursátiles	Forex	Bonos soberanos	Materias primas	CDS soberano
ASE de Grecia +3.95 % 661.13 c +25.10	Shequel israelí +0.70 % 3.4383 c -0.0243	España 2A +0.0 bp -0.480	Algodón NYB +2.79 % 66.62 c +1.81	CDS de Israel -1.69 bp 53.27
Eslovaquia SKSM +4.30 % 371.23 c +15.31	China Renminbi +0.38 % 6.8086 c -0.0262	Alemania 2A +0.0 bp -0.710	Aceite de palma DCE +2.17 % 6114 d +130	CDS de Noruega -0.91 bp 10.74
JCI de Indonesia +2.89 % 5161.828 c +145.11	Dólar taiwanés +0.07 % 29.486 c -0.020	Suiza 2A +0.0 bp -0.854 c	Aceite de palma MDE +2.88 % 2892.00 c +81.00	CDS de Finlandia -3.52 bp 10.44
México IPC +1.51 % 36881.99 c +547.05	Won sudcoreano +0.28 % 1183.60 c -3.30	Bélgica 2A +0.0 bp -0.664	Algodón ZCE +1.35 % 12775 d +170	CDS de Suecia -1.04 bp 10.05
Mayor caída				
Índices bursátiles	Forex	Bonos soberanos	Materias primas	CDS soberano
OMX de Islandia -1.47 % 1528.33 c -22.78	Peso argentino -0.28 % 75.1150 c +0.2093	Nueva Zelanda 5A +0.9 bp -0.003	Café NYB -7.10 % 123.05 c -9.40	Austria CDS +1.19 bp 9.53
Argentina Merval -2.67 % 44614.08 c -1225.9	Índice BBG USD -0.31 % 1165.48 c -3.65	Portugal 2A +0.0 bp -0.583	Café ICE -3.21 % 1387 c -46	CDS de Islandia +1.62 bp 62.82
COLCAP de Colombia -1.06 % 1199.65 c -12.80	NDF de won sudcore... -0.05 % 1182.66 +0.64	Suecia 2A +0.0 bp -0.418	Porcino en canal -3.67 % 63.575 c -2.425	CDS de Canadá +0.34 bp 24.58
Tailandia SET -0.60 % 1272.34 c -7.62	Corona sueca -0.03 % 8.7713 +0.0025	Polonia 2A +0.0 bp 0.048 c	Azúcar NYB -0.79 % 12.50 c -0.10	CDS de Indonesia +1.62 bp 90.87 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

The content of this document is just for informational purposes. The information and opinions expressed should not be consider as recommendations for future decisions. Under any circumstances, the Capital Market Laboratory of University of Lima will be responsible for the use of the statements in this document