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PREMIA
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Semana del mercado: 17 de noviembre 2025

Los Mercados (al cierre del mercado del 14 de noviembre del 2025)

La semana pasada estuvo marcada por la reapertura del gobierno de EE. UU. después de un prolongado cierre. Sin embargo, a pesar de un impulso significativo en el mercado bursátil al comienzo de la semana, el sentimiento positivo se desvaneció a medida que avanzaban los días, ya que los inversores estaban preocupados por las altas valoraciones de las acciones de IA y la incertidumbre sobre la política de la Reserva Federal. El NASDAQ y el Russell 2000 terminaron la semana en números rojos, mientras que el S&P 500, el Dow y el Global Dow cerraron al alza. El sector de IA, que ha sido un importante motor del mercado durante gran parte del año, experimentó una volatilidad significativa debido a la preocupación de los inversores sobre su sostenibilidad a largo plazo. Los sectores de salud, energía y materiales registraron ganancias, mientras que el de consumo discrecional y el de servicios de comunicación tuvieron un rendimiento inferior. Los rendimientos de los bonos del Tesoro a diez años aumentaron, probablemente reflejando menores expectativas de otro recorte de tasas en la próxima reunión de la Reserva Federal en diciembre. Los precios del petróleo crudo se movieron muy poco respecto a la semana anterior, ya que las preocupaciones persistentes sobre el aumento de inventarios en EE. UU. y la sobreproducción siguieron presionando los precios.

Fechas Clave / Publicación de Datos

26/11: GDP, pedidos de bienes duraderos, comercio internacional de bienes, ventas de viviendas nuevas, ingresos y gastos personales.

Índices del Mercado

Market/Index	2024 Close	Prior Week	As of 11/14	Weekly Change	YTD Change
DJIA	42,544.22	46,987.10	47,147.48	0.34%	10.82%
NASDAQ	19,310.79	23,004.54	22,900.59	-0.45%	18.59%
S&P 500	5,881.63	6,728.80	6,734.11	0.08%	14.49%
Russell 2000	2,230.16	2,432.82	2,388.23	-1.83%	7.09%
Global Dow	4,863.01	5,970.60	6,037.77	1.13%	24.16%
fed. funds target rate	4.25%-4.50%	3.75%-4.00%	3.75%-4.00%	0 bps	-50 bps
10-year Treasuries	4.57%	4.09%	4.14%	5 bps	-43 bps
US Dollar-DXY	108.44	99.54	99.27	-0.27%	-8.46%
Crude Oil-CL=F	$71.76	$59.89	$60.03	0.23%	-16.35%
Gold-GC=F	$2,638.50	$4,010.40	$4,084.40	1.85%	54.80%

El gráfico refleja cambios en los precios, no el rendimiento total. Debido a que no incluye dividendos ni divisiones, no debe usarse como referencia para evaluar el desempeño de inversiones específicas.

Noticias Económicas de la Semana Pasada

- La publicación de la mayoría de los datos económicos siguió retrasándose debido al cierre del gobierno. Sin embargo, a medida que la información esté disponible, se incluirá aquí.

- El precio minorista promedio nacional de la gasolina regular fue de $3.056 por galón el 10 de noviembre, $0.037 por galón por encima del precio de la semana anterior y $0.004 por galón más alto que hace un año. Además, al 10 de noviembre, el precio en la Costa Este disminuyó $0.005 a $2.912 por galón; el precio en el Medio Oeste aumentó $0.082 a $2.910 por galón; el precio en la Costa del Golfo subió $0.088 a $2.599 por galón; el precio en las Montañas Rocosas cayó $0.029 a $2.909 por galón; y el precio en la Costa Oeste aumentó $0.031 a $4.159 por galón.

A la vista de la semana que viene

El fin del cierre del gobierno debería resultar en la publicación de datos e informes económicos. Continuaremos monitoreando la publicación de informes económicos importantes a medida que estén disponibles.

Data sources: Economic: Based on data from U.S. Bureau of Labor Statistics (unemployment, inflation); U.S. Department of Commerce (GDP, corporate profits, retail sales, housing); S&P/Case-Shiller 20-City Composite Index (home prices); Institute for Supply Management (manufacturing/services). Performance: Based on data reported in WSJ Market Data Center (indexes); U.S. Treasury (Treasury yields); U.S. Energy

Information Administration/Bloomberg.com Market Data (oil spot price, WTI, Cushing, OK); www.goldprice.org (spot gold/silver); Oanda/FX Street (currency exchange rates).

News items are based on reports from multiple commonly available international news sources (i.e., wire services) and are independently verified when necessary with secondary sources such as government agencies, corporate press releases, or trade organizations. All information is based on sources deemed reliable, but no warranty or guarantee is made as to its accuracy or completeness. Neither the information nor any opinion expressed herein constitutes a solicitation for the purchase or sale of any securities, and should not be relied on as financial advice. Forecasts are based on current conditions, subject to change, and may not come to pass. U.S. Treasury securities are guaranteed by the federal government as to the timely payment of principal and interest. The principal value of Treasury securities and other bonds fluctuates with market conditions. Bonds are subject to inflation, interest-rate, and credit risks. As interest rates rise, bond prices typically fall. A bond sold or redeemed prior to maturity may be subject to loss. Past performance is no guarantee of future results. All investing involves risk, including the potential loss of principal, and there can be no guarantee that any investing strategy will be successful.

The Dow Jones Industrial Average (DJIA) is a price-weighted index composed of 30 widely traded blue-chip U.S. common stocks. The S&P 500 is a market-cap weighted index composed of the common stocks of 500 largest, publicly traded companies in leading industries of the U.S. economy. The NASDAQ Composite Index is a market-value weighted index of all common stocks listed on the Nasdaq stock exchange. The Russell 2000 is a market-cap weighted index composed of 2,000 U.S. small-cap common stocks. The Global Dow is an equally weighted index of 150 widely traded blue-chip common stocks worldwide. The U.S. Dollar Index is a geometrically weighted index of the value of the U.S. dollar relative to six foreign currencies. Market indexes listed are unmanaged and are not available for direct investment.

IMPORTANT DISCLOSURES

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