Premia Global Advisors
Miguel Sosa, CIMA®
Fundador
2600 South Douglas Road
Suite 1103
Coral Gables, FL 33134
786-646-9141
msosa@premiaglobaladvisors.com
www.premiaglobaladvisors.com

Semana del mercado: 20 de octubre 2025

Los Mercados (al cierre del mercado del 17 de octubre del 2025)

La semana pasada estuvo marcada por un nuevo período de volatilidad en los mercados bursátiles, impulsado en gran medida por las tensiones comerciales entre Estados Unidos y China, la continuación del cierre del gobierno y las preocupaciones sobre la solidez del sector bancario. A pesar de las fluctuaciones a lo largo de la semana, las acciones cerraron en terreno positivo, con todos los índices de referencia registrando ganancias. El sector financiero fue una fuente importante de volatilidad tras conocerse informes sobre problemas crediticios vinculados a presuntos fraudes en algunos bancos regionales, lo que generó inquietud entre los inversores. No obstante, los resultados del tercer trimestre, mejores de lo previsto, presentados por varios grandes bancos contribuyeron a disipar parte de esas preocupaciones. Los rendimientos de los bonos del Tesoro a 10 años descendieron por debajo del 4,00 % a mitad de semana, antes de repuntar en los días posteriores. Los precios del crudo retrocedieron por tercera semana consecutiva, mientras que el oro superó los 4.300 dólares por onza a comienzos de la semana antes de estabilizarse cerca de los 4.250 dólares.

Fechas Clave / Publicación de Datos

23 de octubre: Ventas de viviendas existentes

24 de octubre: Ventas de viviendas nuevas

Índices del Mercado

Market/Index	2024 Close	Prior Week	As of 10/17	Weekly Change	YTD Change
DJIA	42,544.22	45,479.60	46,190.61	1.56%	8.57%
NASDAQ	19,310.79	22,204.43	22,679.97	2.14%	17.45%
S&P 500	5,881.63	6,552.51	6,664.01	1.70%	13.30%
Russell 2000	2,230.16	2,394.59	2,452.17	2.40%	9.95%
Global Dow	4,863.01	5,863.26	5,956.58	1.59%	22.49%
fed. funds target rate	4.25%-4.50%	4.00%-4.25%	4.00%-4.25%	0 bps	-25 bps
10-year Treasuries	4.57%	4.05%	4.00%	-5 bps	-57 bps
US Dollar-DXY	108.44	98.96	98.46	-0.51%	-9.20%
Crude Oil-CL=F	$71.76	$58.86	$57.59	-2.16%	-19.75%
Gold-GC=F	$2,638.50	$4,027.70	$4,249.10	5.50%	61.04%

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 se ha retrasado debido al cierre del gobierno.
- El precio promedio nacional minorista de la gasolina regular fue de 3,061 dólares por galón el 13 de octubre, lo que representa una disminución de 0,063 dólares por galón respecto a la semana anterior y de 0,110 dólares por galón en comparación con el año pasado. Asimismo, al 13 de octubre, el precio en la Costa Este bajó 0,032 dólares hasta 2,952 dólares por galón; en el Medio Oeste descendió 0,121 dólares hasta 2,812 dólares por galón; en la Costa del Golfo disminuyó 0,096 dólares hasta 2,623 dólares por galón; en las Montañas Rocosas cayó 0,017 dólares hasta 3,049 dólares por galón; y en la Costa Oeste retrocedió 0,013 dólares hasta 4,213 dólares por galón.

A la vista de la semana que viene

Habrá pocos datos económicos relevantes disponibles durante el cierre del gobierno.

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).

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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.

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