

Automotive

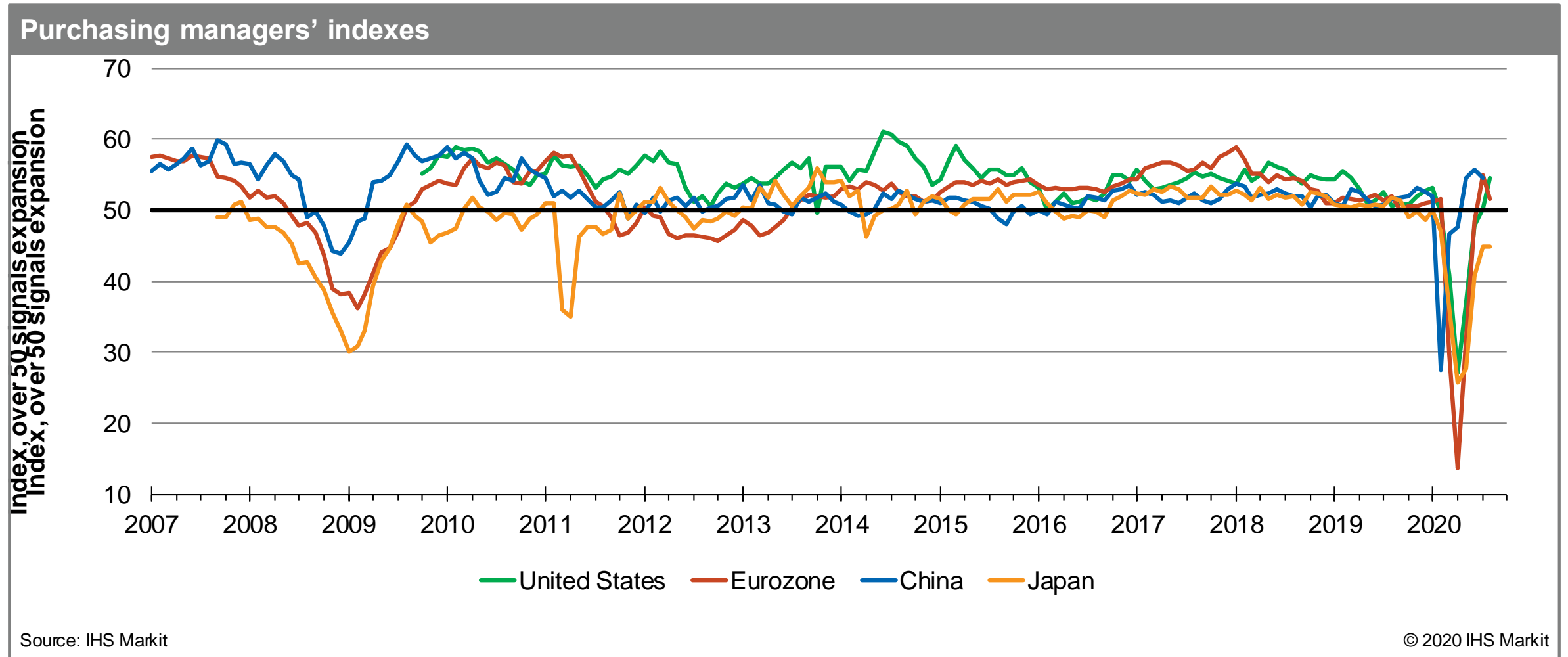
Impacto COVID-19 9/17 Perú

Septiembre, 2020

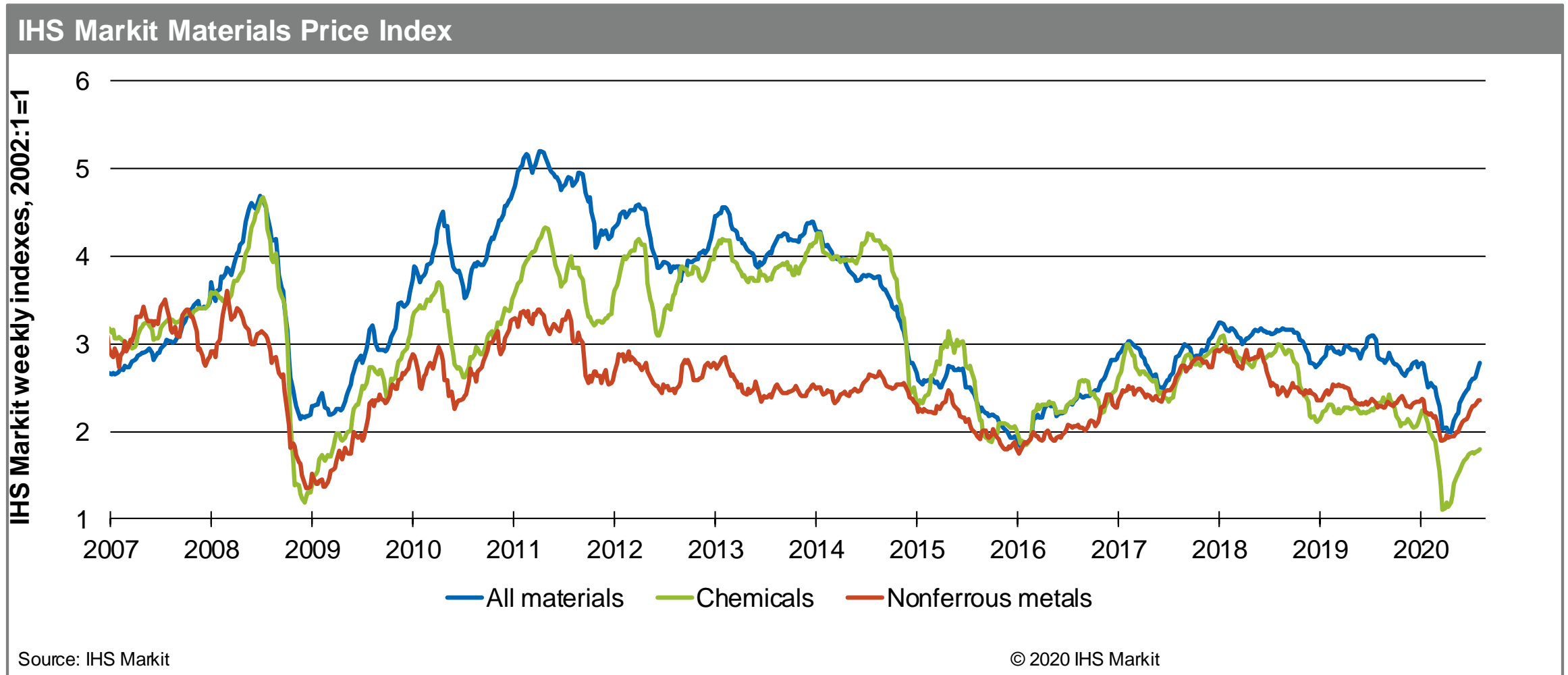
Guido Vildoza



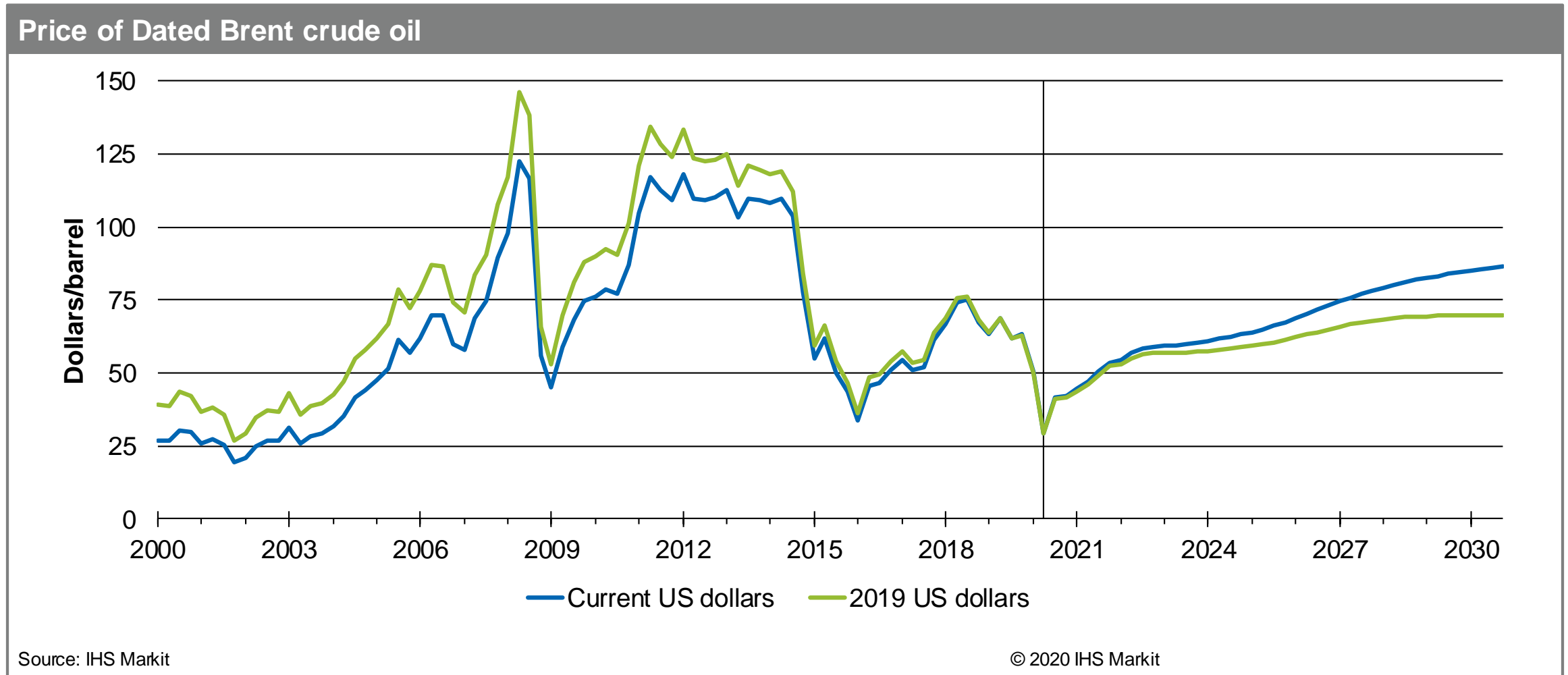
Índice PMI continúan mayormente sincronizados, ateniendo estabilidad



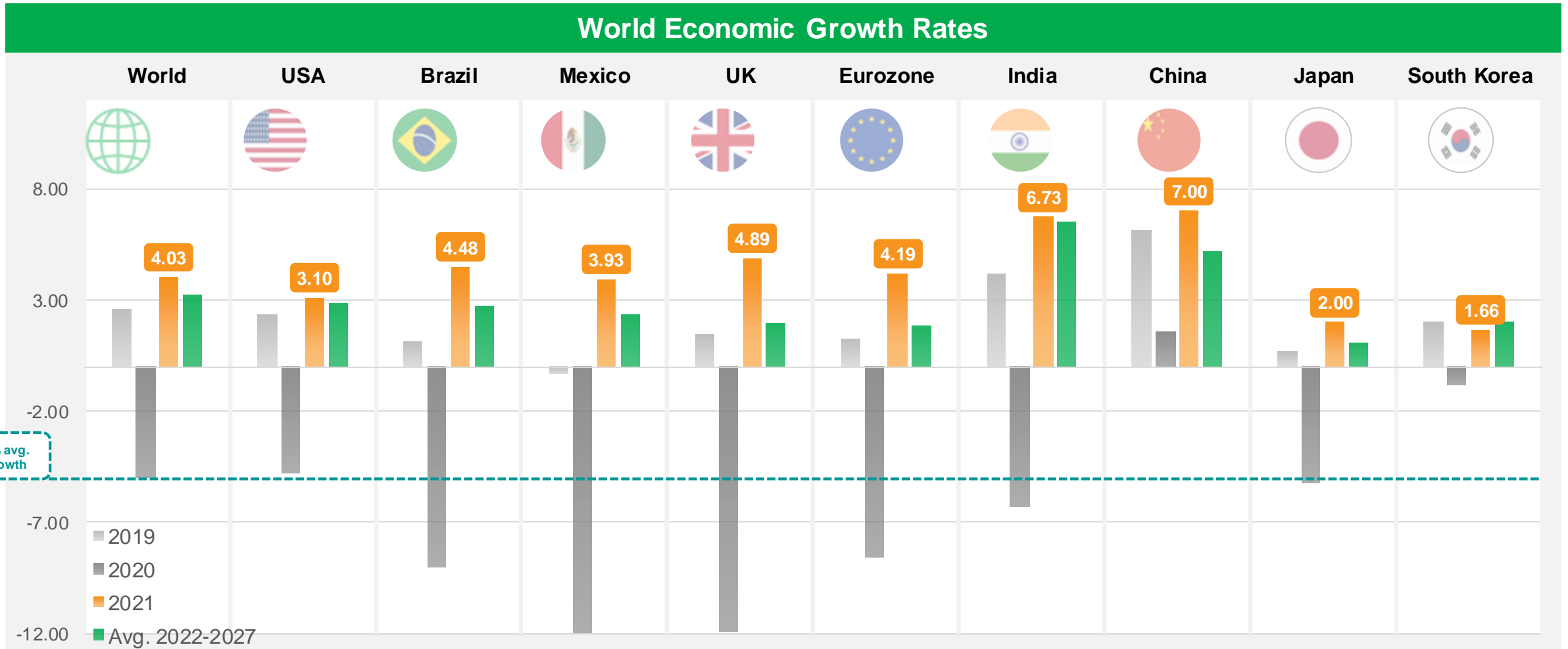
Los commodities reflejan la recuperación en producción industrial



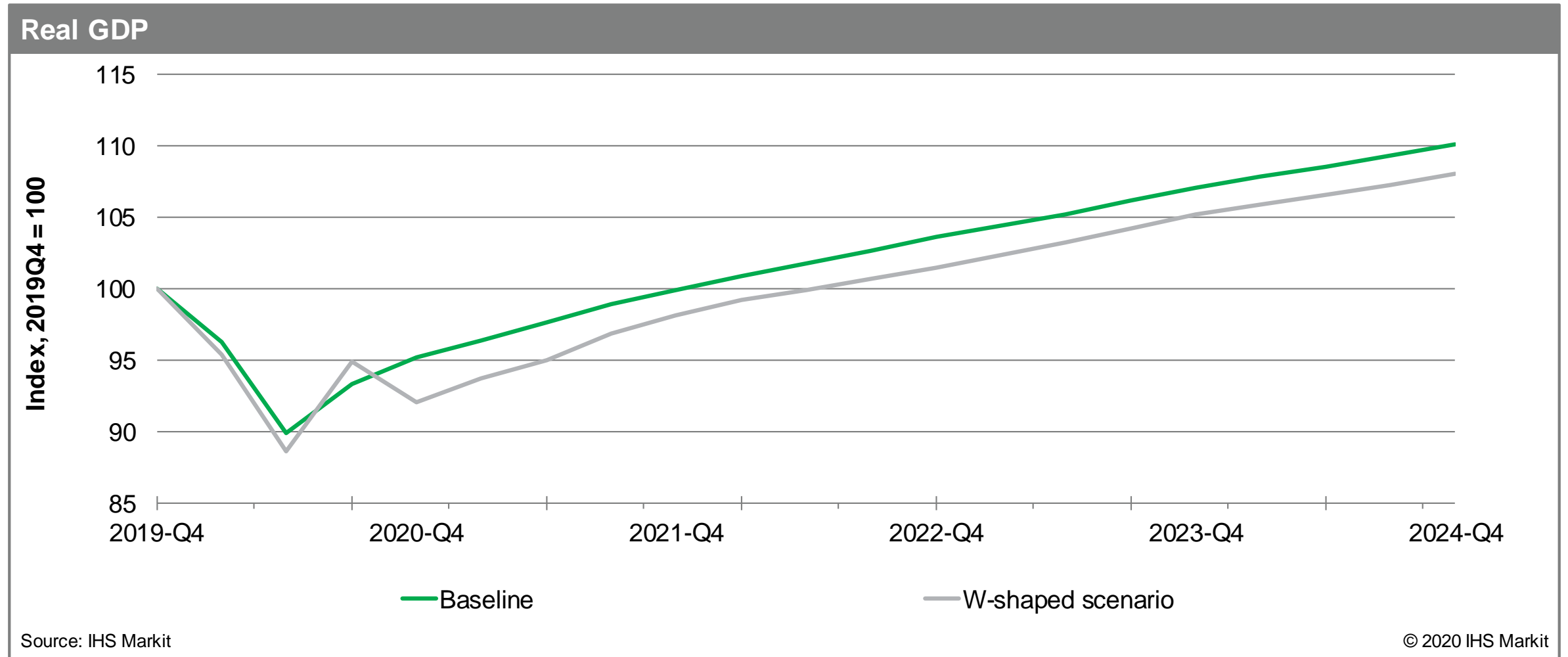
El petróleo continua en su ciclo de estabilización



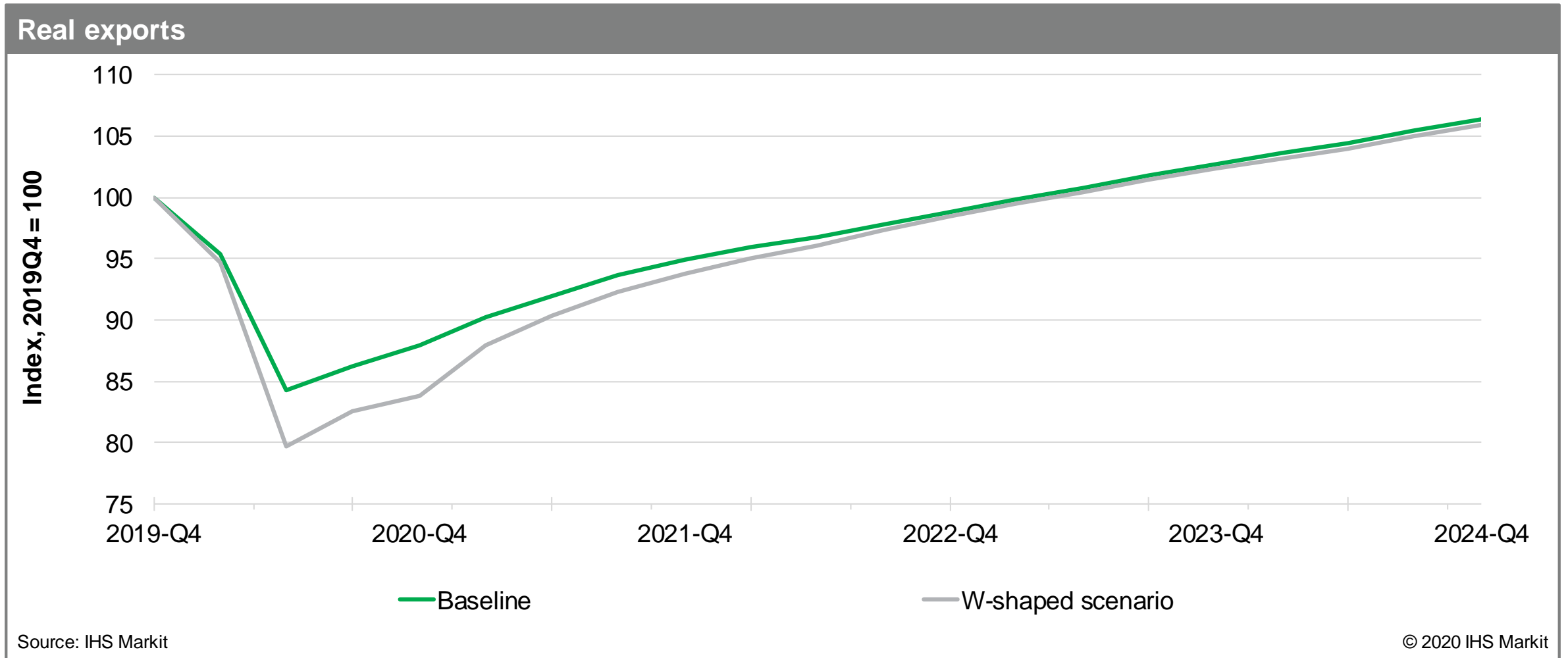
Crecimiento Real de PIB Mundial, Mercados Primarios Automotrices



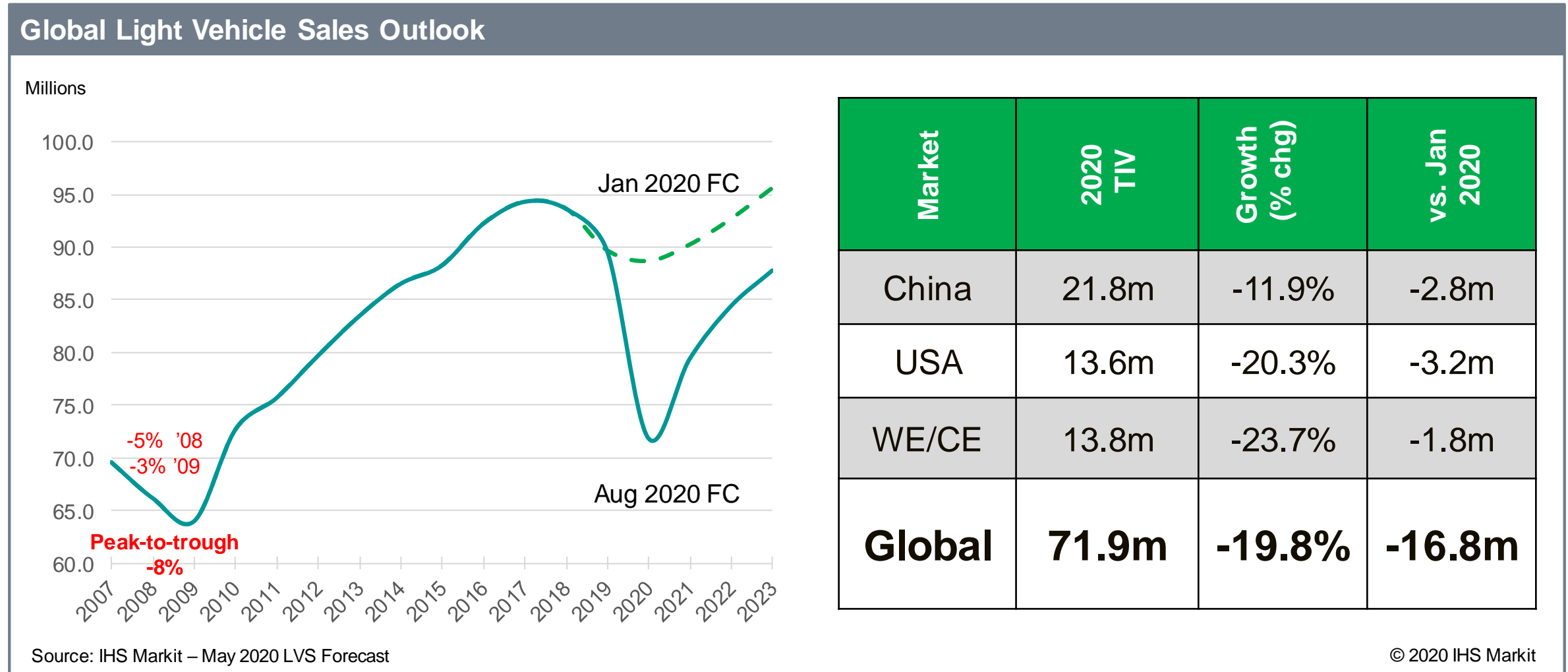
PIB Mundial ante una segunda ola



Exportaciones ante una segunda ola



COVID 19 genera un impacto severo en las ventas automotrices a nivel mundial

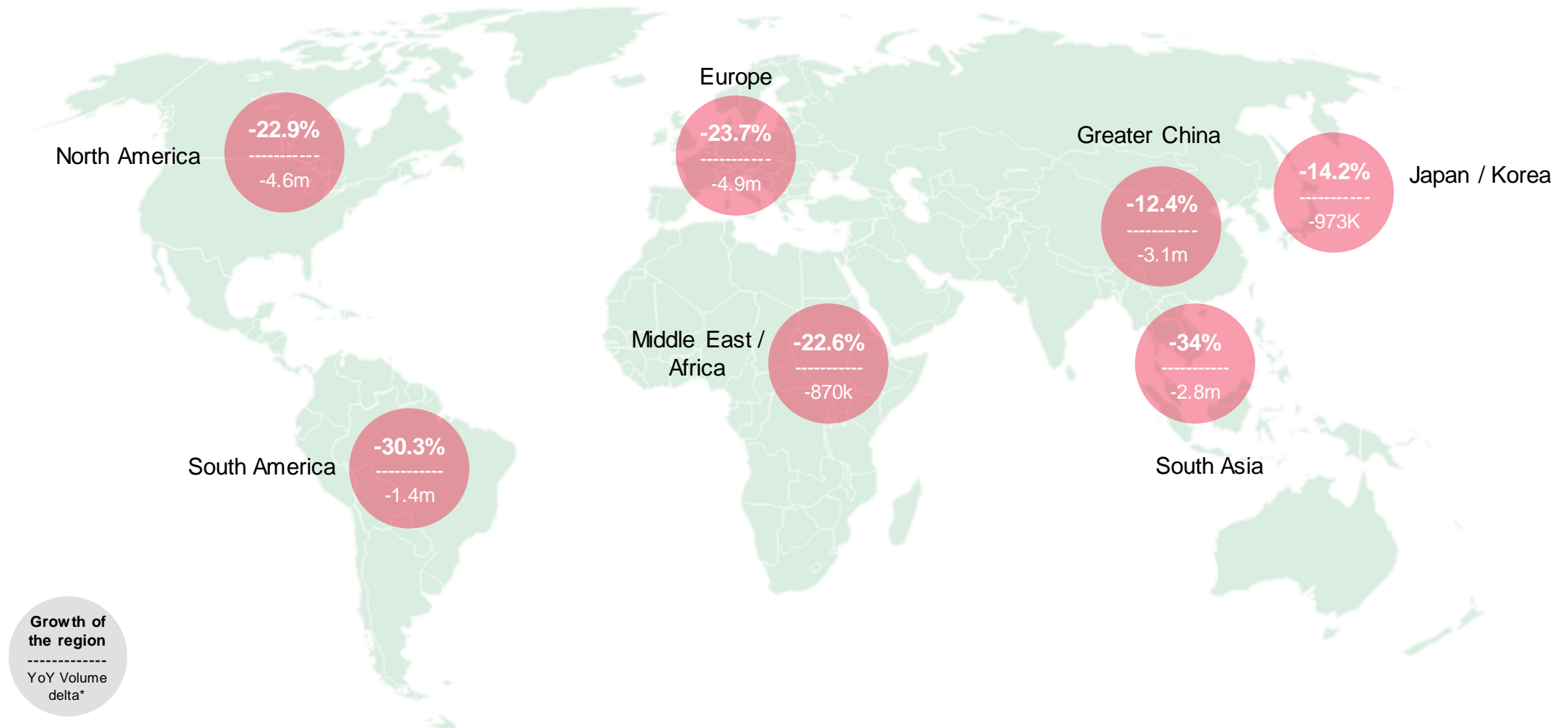


Market	2020 TIV	Growth (% chg)	vs. Jan 2020
China	21.8m	-11.9%	-2.8m
USA	13.6m	-20.3%	-3.2m
WE/CE	13.8m	-23.7%	-1.8m
Global	71.9m	-19.8%	-16.8m

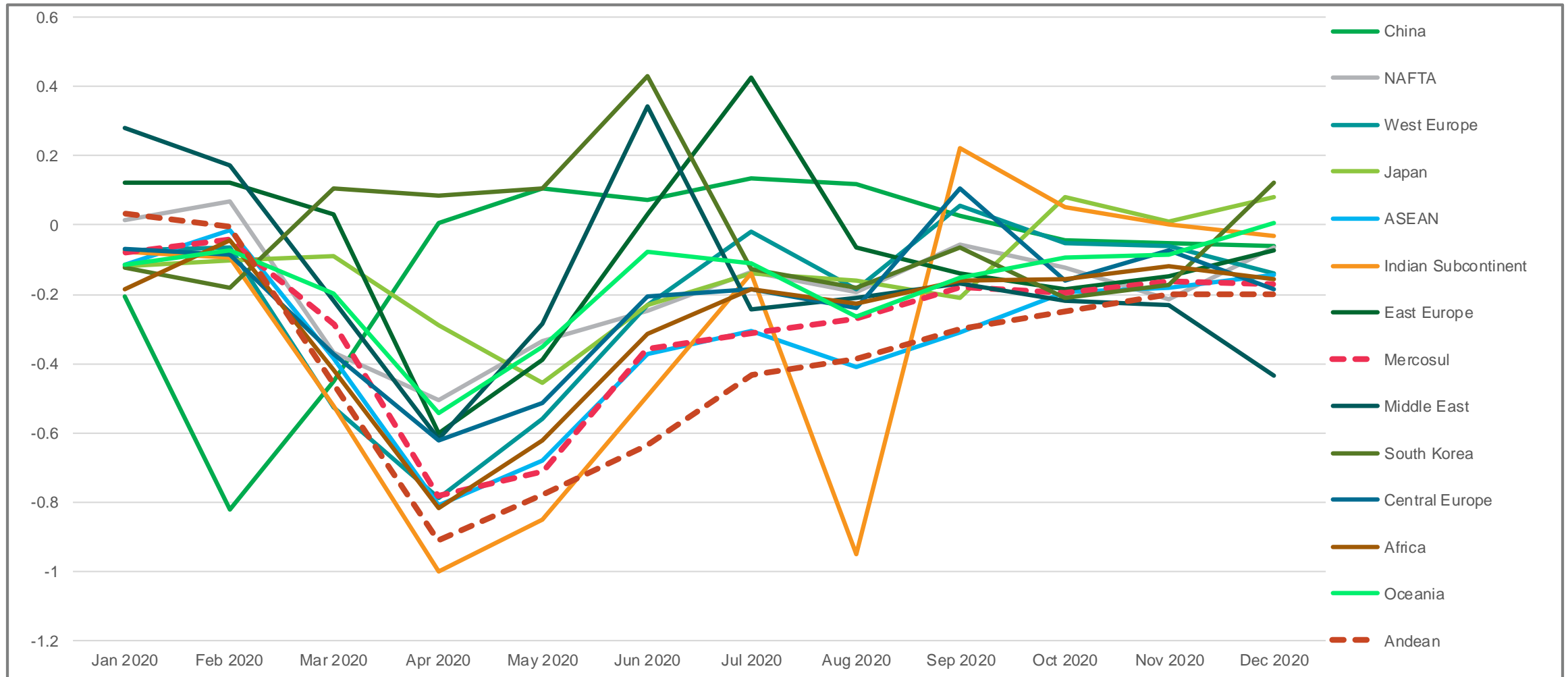
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Note: China refers to Mainland China

Comportamiento Regional 2020 vs 2019

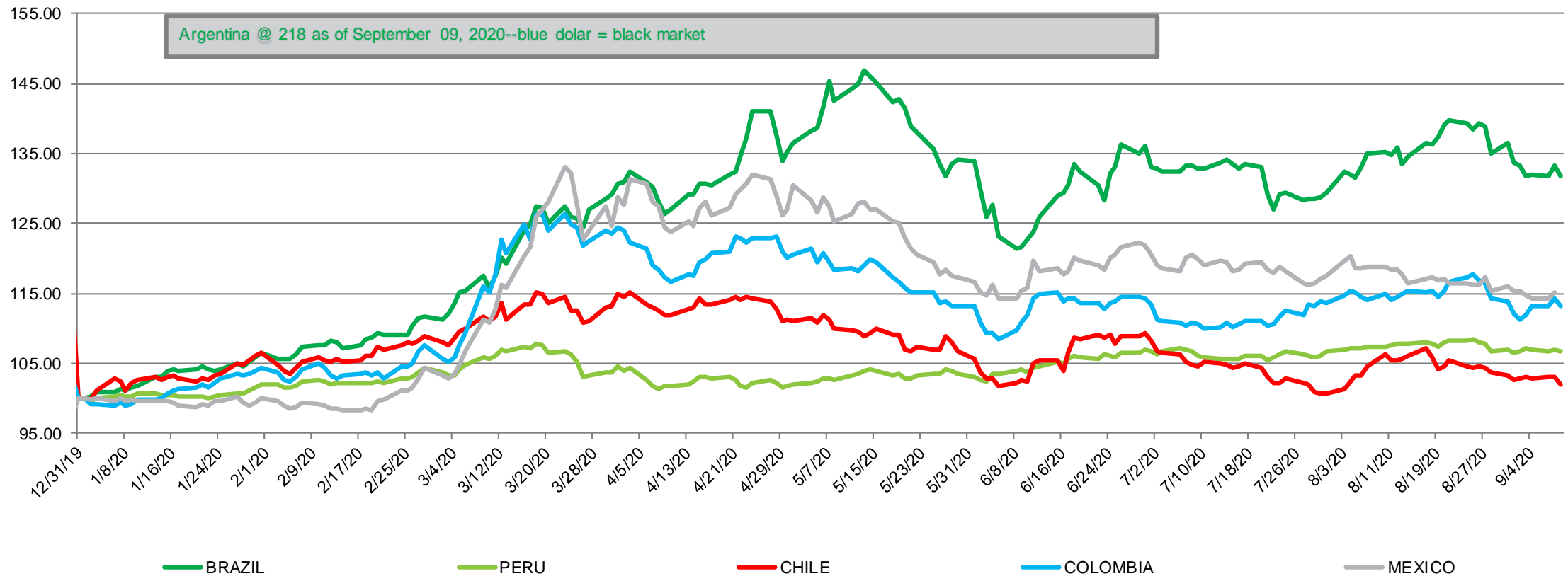


Global Agosto vs Enero



Devaluaciones en nuestras monedas, pero lo peor parece ya haber pasado

Nominal exchange rates: local currencies vs US dollar. December 31, 2019 = 100

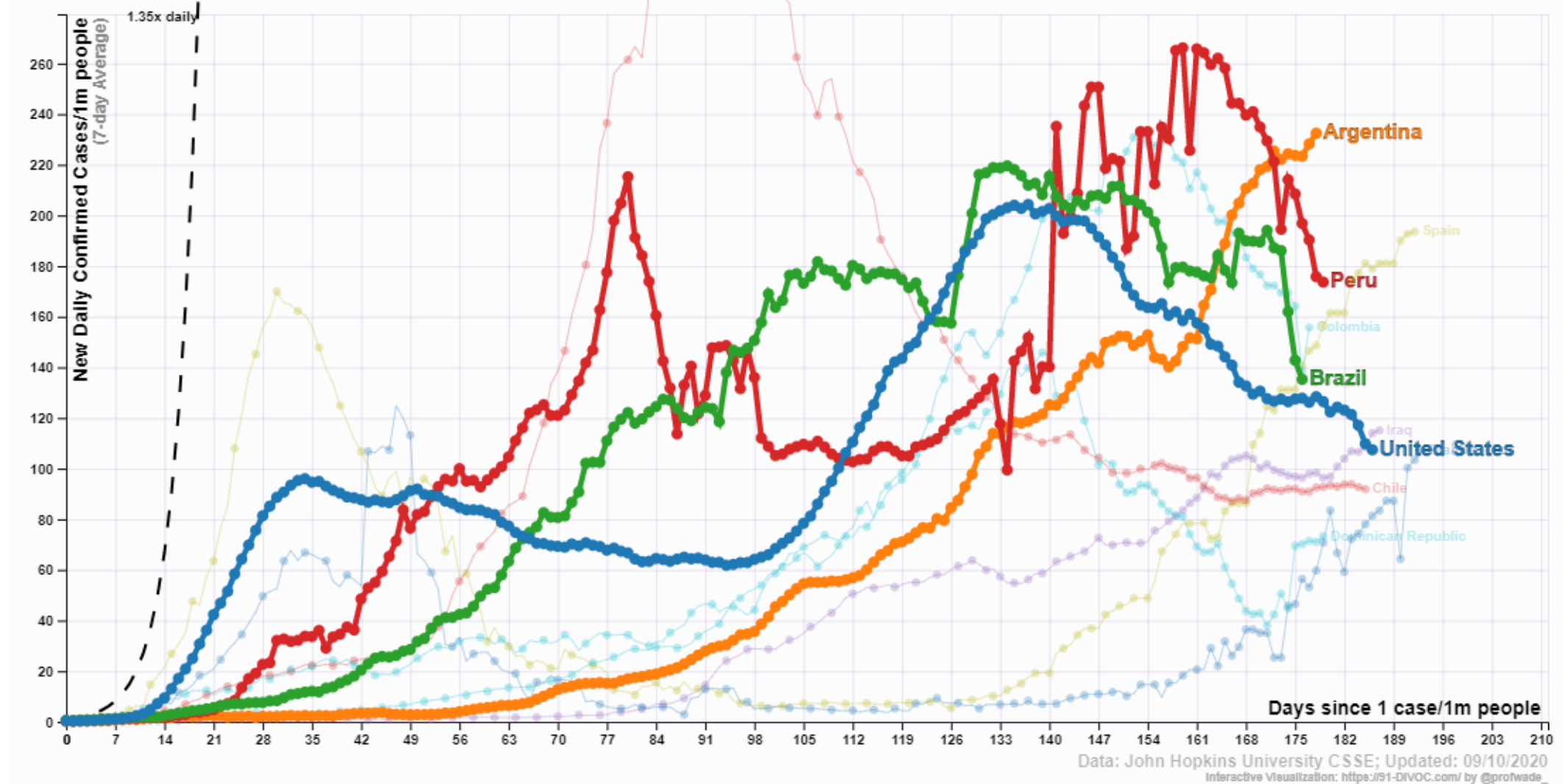


Source: FINANCIAL TIMES -- INTERACTIVE DATA CORP & IHS Markit

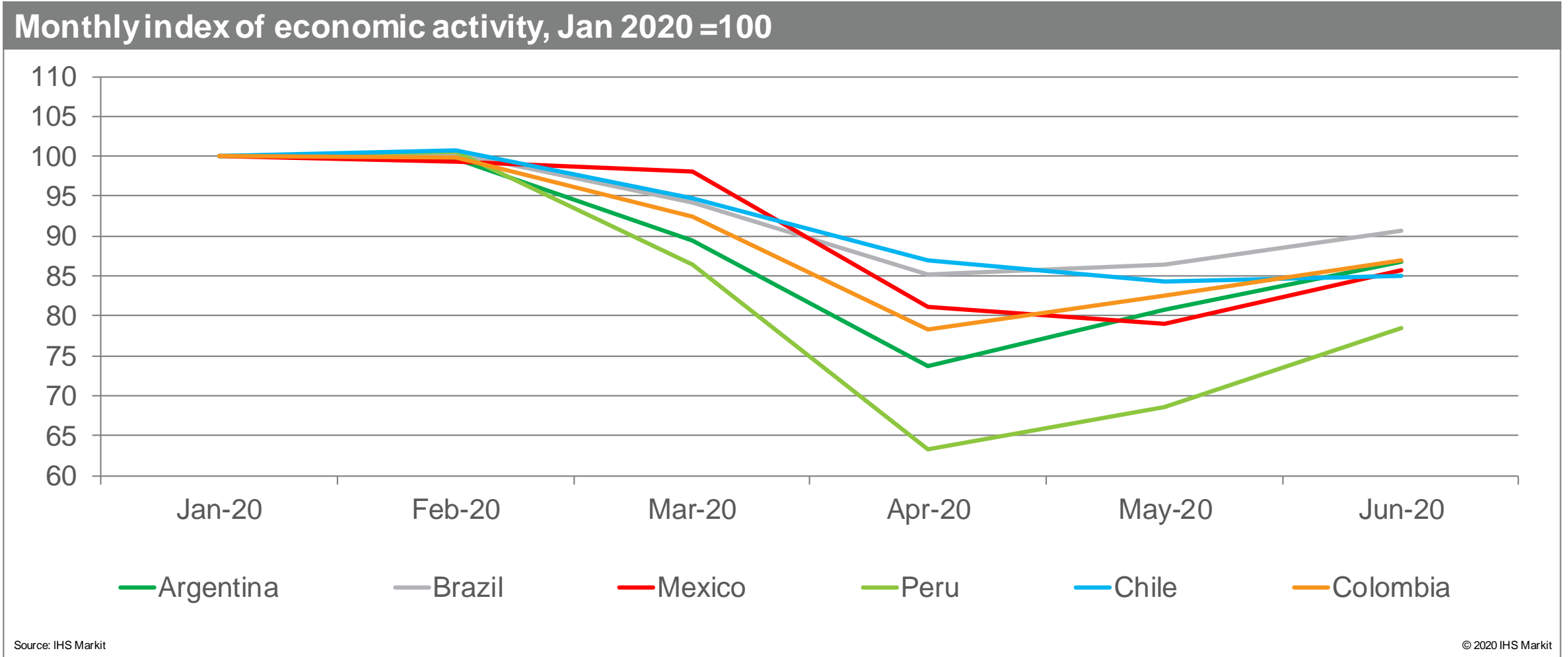
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Propagación de COVID 19, Nuevos infectados, normalizado a población

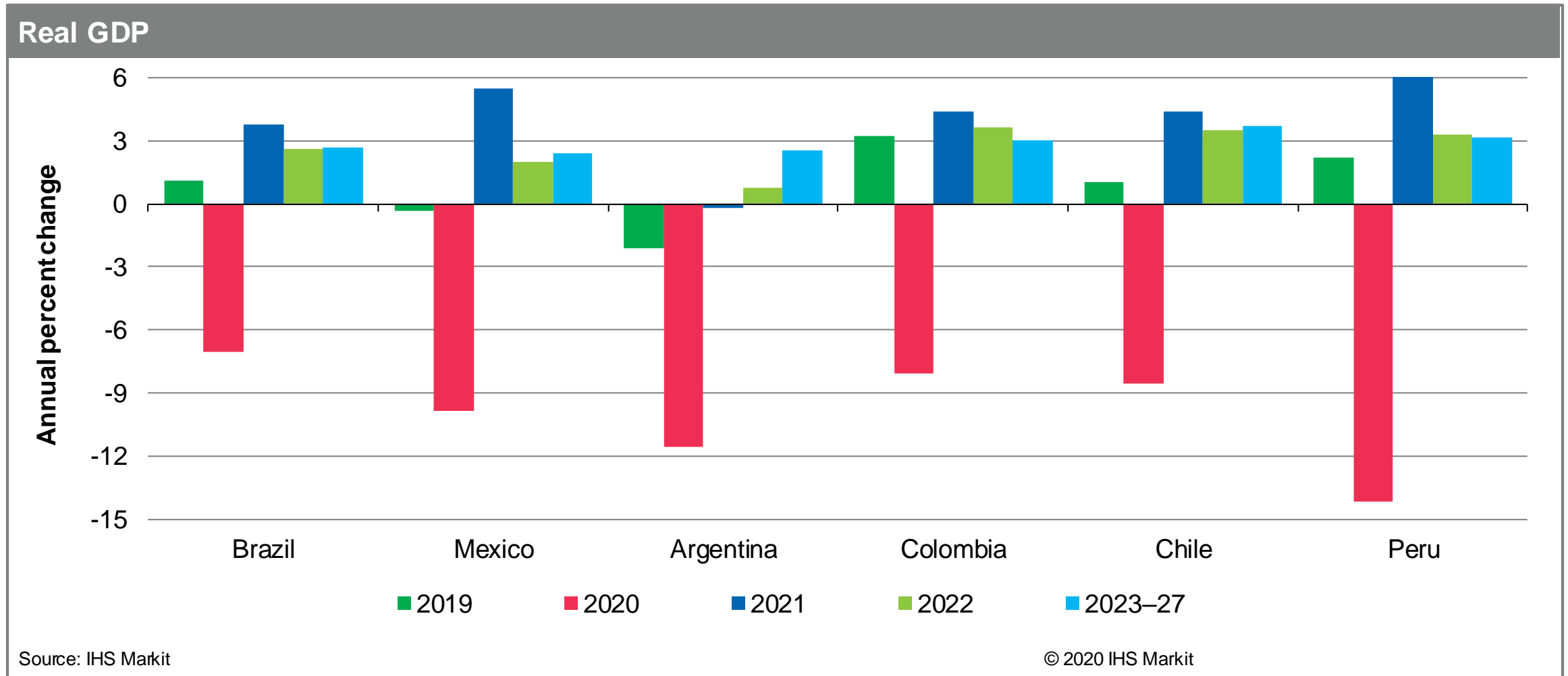
New Confirmed COVID-19 Cases per Day, normalized by population



Índice de Actividad Económica



Crecimiento Real de PIB en America Latina



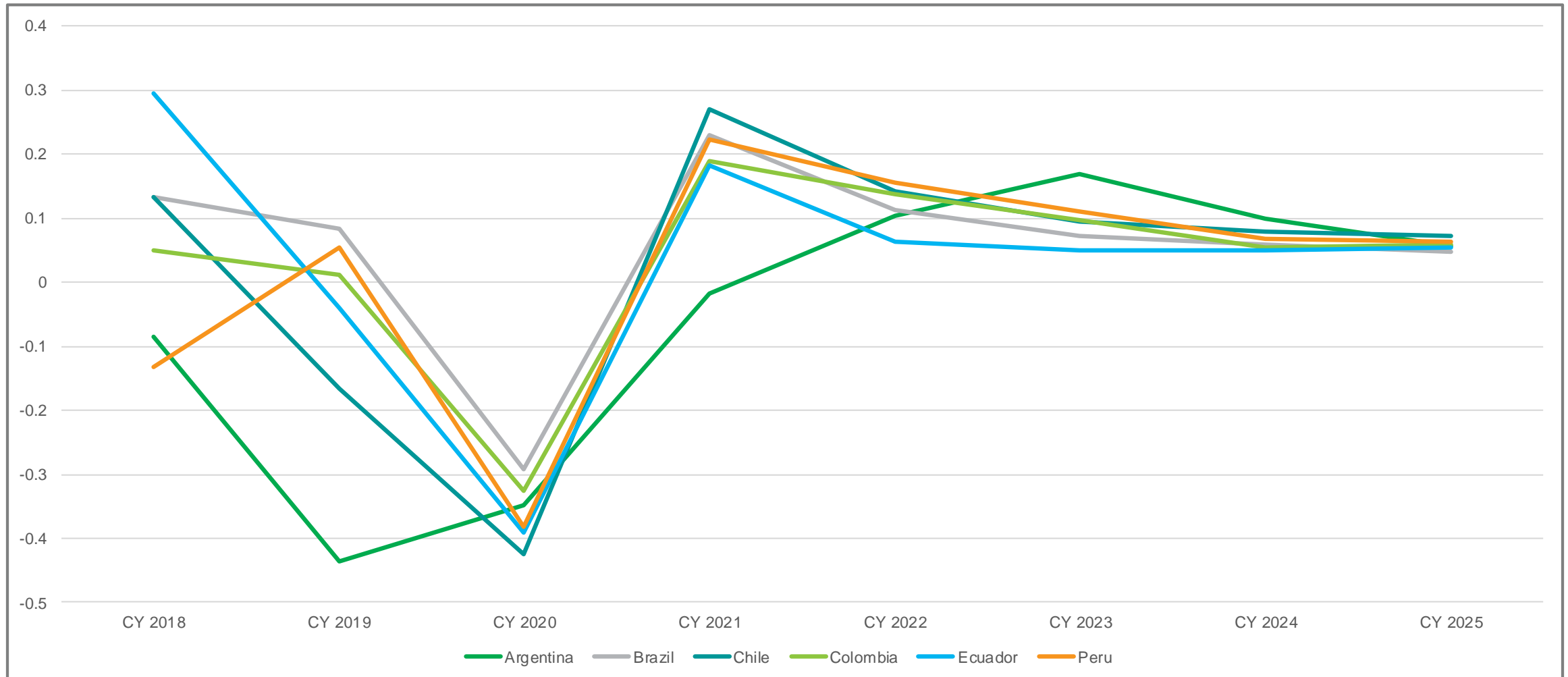
Indicadores económicos en América Latina Enero vs Agosto

GDP	Jan							Aug						
	2019	2020	2021	2022	2023	2024	2025	2019	2020	2021	2022	2023	2024	2025
Brazil	1.1%	1.7%	1.7%	1.8%	2.1%	2.5%	2.7%	1.1%	-7.0%	3.8%	2.6%	2.0%	2.6%	2.9%
Argentina	-2.6%	-2.6%	0.0%	0.3%	1.2%	2.3%	2.1%	-2.1%	-11.5%	-0.2%	0.8%	2.6%	2.8%	2.4%
Colombia	3.1%	3.2%	2.9%	2.8%	2.7%	2.7%	2.9%	3.3%	-8.0%	4.4%	3.7%	3.1%	2.9%	2.9%
Chile	1.1%	1.6%	2.8%	3.1%	3.3%	3.4%	3.8%	1.0%	-8.5%	4.8%	3.6%	3.5%	3.6%	3.6%
Peru	2.3%	2.5%	3.2%	3.2%	3.7%	2.9%	3.1%	2.2%	-14.1%	7.1%	3.3%	4.0%	2.7%	3.0%
Ecuador	-0.5%	0.4%	0.9%	1.5%	1.9%	2.0%	2.3%	0.1%	-8.9%	1.3%	1.9%	2.2%	2.5%	2.6%

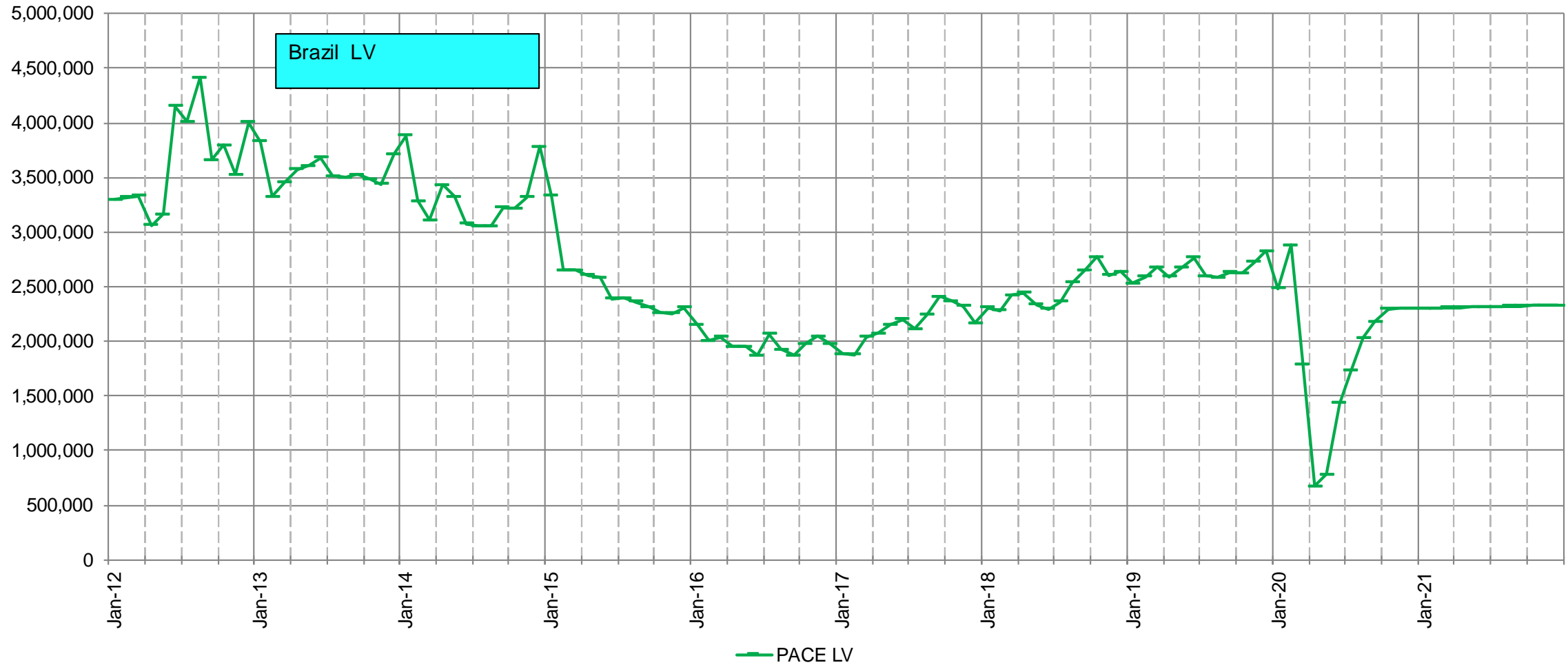
FX	Jan							Aug						
	2019	2020	2021	2022	2023	2024	2025	2019	2020	2021	2022	2023	2024	2025
Brazil	3.9	4.3	4.3	4.3	4.4	4.4	4.5	3.9	5.1	4.6	4.3	4.4	4.4	4.5
Argentina	48.3	92.8	112.3	116.9	121.1	125.0	129.3	48.3	79.3	114.5	126.1	135.4	142.9	149.3
Colombia	3281.2	3306.2	3270.3	3275.6	3302.5	3325.9	3347.4	3281.2	3698.8	3667.2	3655.4	3639.1	3628.4	3617.1
Chile	702.8	753.5	708.9	683.2	671.3	663.8	663.6	702.8	802.4	772.5	750.4	741.5	734.9	736.2
Peru	3.4	3.5	3.5	3.6	3.6	3.6	3.6	3.3	3.5	3.6	3.5	3.5	3.5	3.5
Ecuador	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0

Inflation	Jan							Aug						
	2019	2020	2021	2022	2023	2024	2025	2019	2020	2021	2022	2023	2024	2025
Brazil	3.7%	3.7%	3.6%	3.7%	3.7%	3.8%	3.8%	3.7%	2.6%	2.9%	3.4%	3.1%	3.1%	3.2%
Argentina	52.9%	50.7%	30.8%	19.6%	14.6%	8.5%	5.4%	52.8%	45.1%	42.1%	23.4%	18.6%	12.3%	8.5%
Colombia	3.5%	3.5%	3.3%	3.3%	3.3%	3.1%	3.1%	3.5%	2.7%	2.7%	3.3%	3.3%	3.2%	3.1%
Chile	2.2%	2.9%	3.0%	3.0%	3.0%	2.9%	3.0%	2.6%	2.9%	2.5%	2.8%	2.8%	2.7%	2.9%
Peru	2.1%	2.0%	2.1%	2.3%	2.2%	2.2%	2.2%	2.1%	1.8%	1.8%	2.0%	2.2%	2.1%	2.2%
Ecuador	0.3%	1.1%	1.5%	1.6%	1.7%	2.2%	2.7%	0.3%	0.0%	0.7%	1.2%	1.6%	1.9%	2.4%

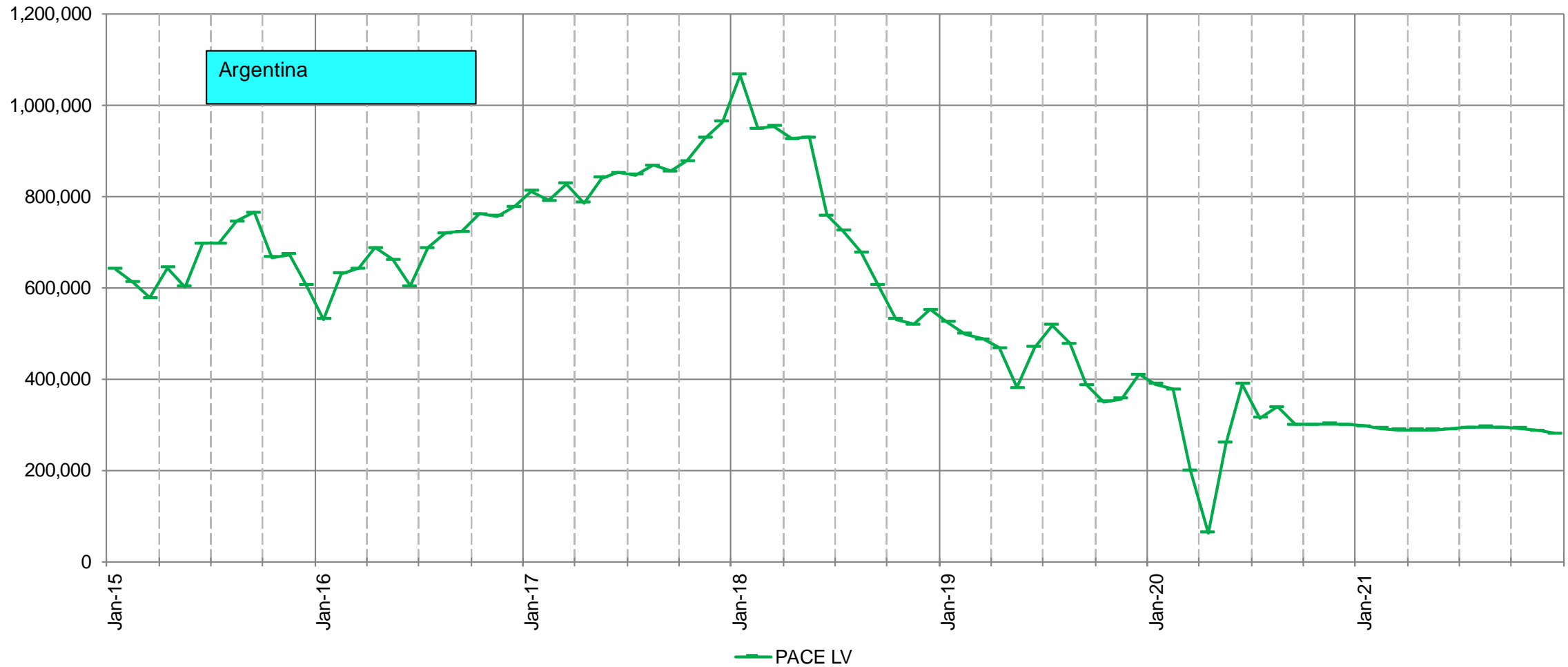
Ventas Sud America



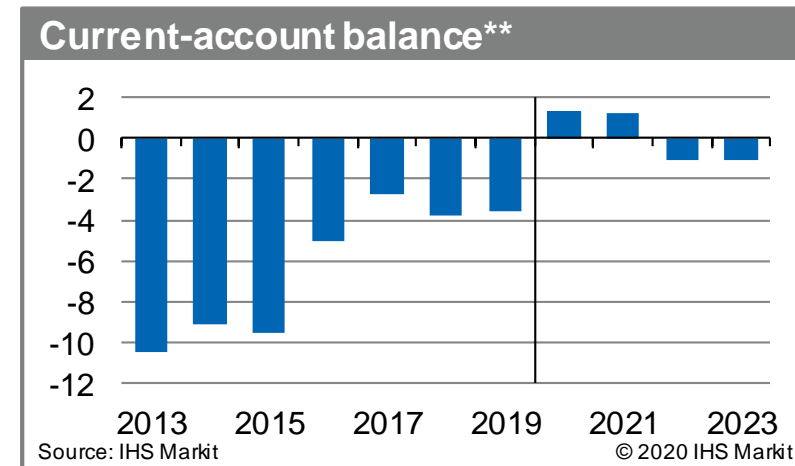
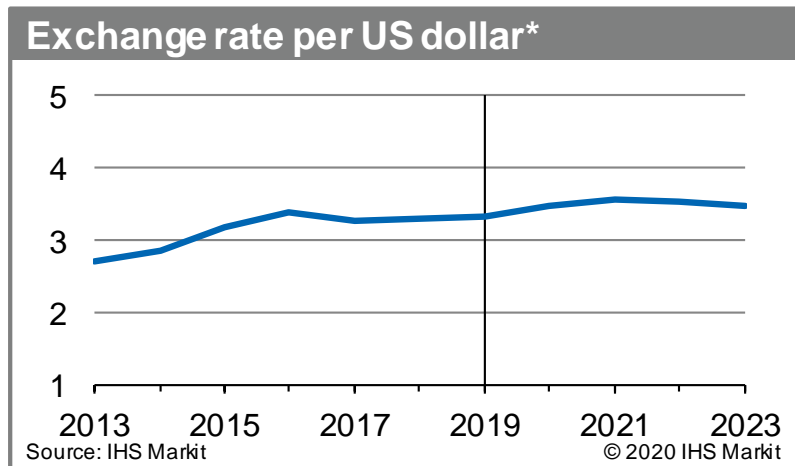
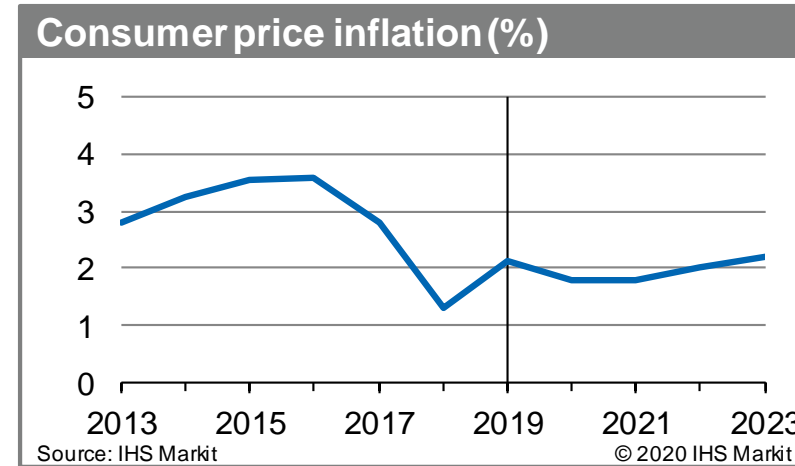
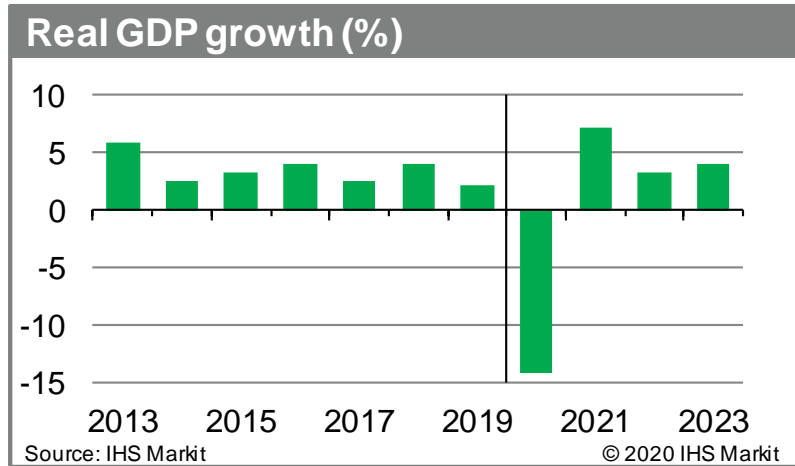
Brazil SAAR September 2020



Argentina SAAR September 2020

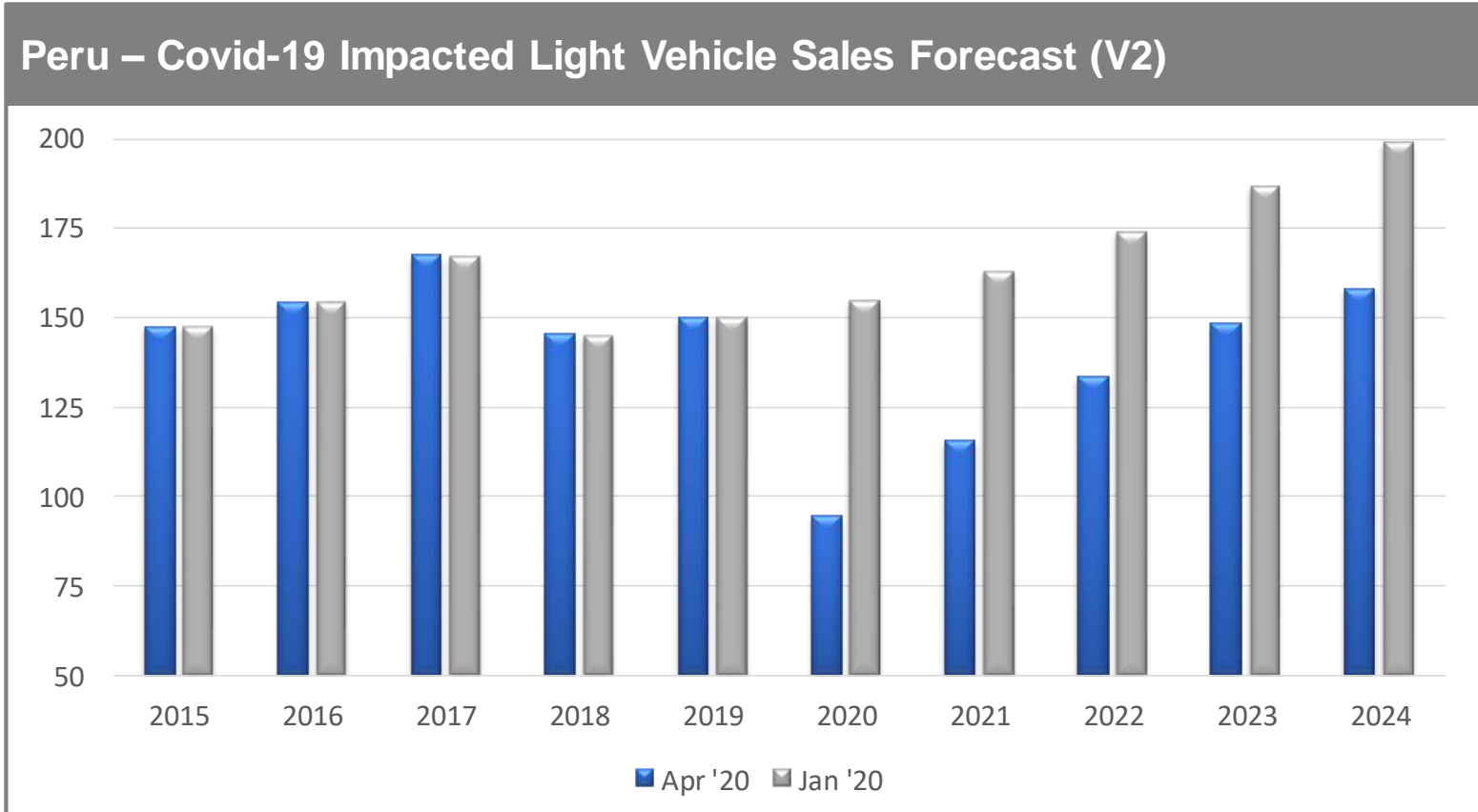


Perú Perspectiva Económica



*Annual average, **Billions of US dollars

Perú Ventas Vehículos Ligeros Septiembre



	2020	2021	2022	2023
% Growth YoY	-37%	22%	15.5%	11%
Vol Delta vs. Pre-Crisis Jan Forecast	-60,588	-47,474	-40,802	-38,801

- Anticipamos una contracción de 14% en la economía Peruana el 2020. El país esta siendo severamente golpeado por COVID-19.
- La economía comenzó su apertura en Julio sin embargo el índice de casos ha estado creciendo.
- Paquete de estímulo de 90 B de Soles, aproximadamente 12% del PIB que incluye plan de bono de 380 soles.
- Estimulo monetario con el Banco Central de la Reserva del Perú reduciendo tasas a 0.25%.
- **El gobierno tiene la capacidad de emitir deuda.** Deuda publica es 24% del PIB y reservas suman 67 B de USD.
- Efecto economía informal esta siendo severo.
- Se importaron casi 45,000 vehículos ligeros al mes de Julio. Anticipamos un promedio de 10,000 unidades mes en lo que salda del año y emplacamientos que se acerquen a las 12,000 para Diciembre.

Thank you! Muchas Gracias! Muito Obrigado!

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