

# Itaú Unibanco Holding S.A. Fundamental Company Report Including Financial, SWOT, Competitors and Industry Analysis

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## Abstracts

Itaú Unibanco Holding S.A. Fundamental Company Report provides a complete overview of the company's affairs. All available data is presented in a comprehensive and easily accessed format. The report includes financial and SWOT information, industry analysis, opinions, estimates, plus annual and quarterly forecasts made by stock market experts. The report also enables direct comparison to be made between Itaú Unibanco Holding S.A. and its competitors. This provides our Clients with a clear understanding of Itaú Unibanco Holding S.A. position in the Industry.

The report contains detailed information about Itaú Unibanco Holding S.A. that gives an unrivalled in-depth knowledge about internal business-environment of the company: data about the owners, senior executives, locations, subsidiaries, markets, products, and company history.

Another part of the report is a SWOT-analysis carried out for Itaú Unibanco Holding S.A.. It involves specifying the objective of the company's business and identifies the different factors that are favorable and unfavorable to achieving that objective. SWOT-analysis helps to understand company's strengths, weaknesses, opportunities, and possible threats against it.

The Itaú Unibanco Holding S.A. financial analysis covers the income statement and ratio trend-charts with balance sheets and cash flows presented on an annual and quarterly basis. The report outlines the main financial ratios pertaining to profitability, margin analysis, asset turnover, credit ratios, and

company's long-term solvency. This sort of company's information will assist and strengthen your company's decision-making processes.

In the part that describes Itaú Unibanco Holding S.A. competitors and the industry in whole, the information about company's financial ratios is compared to those of its competitors and to the industry. The unique analysis of the market and company's competitors along with detailed information about the internal and external factors affecting the relevant industry will help to manage your business environment. Your company's business and sales activities will be boosted by gaining an insight into your competitors' businesses.

Also the report provides relevant news, an analysis of PR-activity, and stock price movements. The latter are correlated with pertinent news and press releases, and annual and quarterly forecasts are given by a variety of experts and market research firms. Such information creates your awareness about principal trends of Itaú Unibanco Holding S.A. business.

### **About Itaú Unibanco Holding S.A.**

Itaú Unibanco Holding S.A. provides credit and other financial services to individuals, small and middle-market companies, and large corporations in Brazil and internationally. As of December 31, 2009, the company had a network of 3,724 full service branches throughout Brazil; 918 customer site branches; and 29,866 automated teller machines.

The company's principal categories of operations are banking, which includes commercial bank through Itaú Unibanco S.A. (Itaú Unibanco); corporate and investment banking through Banco Itaú BBA S.A. (Itaú BBA); and consumer credit.

#### **ITAU UNIBANCO**

**Itaú Unibanco – Commercial Bank.**

The Commercial Bank segment provides a range of banking services to a client base of individuals and companies, among which are the following: retail clients (individuals and very small companies), high net worth clients, private banking clients, and small and middle-sized companies.

The products and services provided by the Commercial Bank include insurance, private retirement and capitalization plans, credit cards, asset management, and loans. The segment provides solutions specifically developed to meet the demand of clients, devising marketing strategies appropriate to each of the different profiles and using the most convenient distribution channels.

The company provides services mainly in the following areas: Retail banking; Public sector; Personnalite; Private bank; Very small business banking; Small business banking; Middle-market banking; Credit cards; Real estate financing; Asset management; Corporate social responsibility; Securities services for third parties; Brokerage; and Insurance, private retirement plans and capitalization products.

### Retail Banking

The company's core business is retail banking, which serves individuals. As of December 31, 2009, the company had approximately 13.7 million customers and 4,465 branches and customer site branches under the 'Itaú' and 'Unibanco' brands. The company's retail banking operations are in all Brazilian states and in cities.

### Very Small Business Banking

The company's very small business banking office managers are trained to offer customized solutions and provide advice on all products and services to very small companies. As of December 31, 2009, the company had approximately 430 very small business banking offices located throughout Brazil and approximately 1,700 managers working for approximately 537,000 small business customers.

### Public Sector

The company's public sector business operates in various areas of the public sector, including federal, state and municipal levels of government (in the executive, legislative and judicial branches). As of December 31, 2009, the company had 2,500 public sector customers.

### Itaú Personnalite

Through Itaú Personnalite, the company provides personalized services to high-income individuals in Brazil. Through its network of 167 branches, Itaú Personnalite's customer base reached approximately 534,000 individuals as of December 31, 2009. Itaú

Personalite customers also have access to Itaú Unibanco network branches and ATMs throughout the country.

## Private Bank

Itaú Private Bank is a Brazilian bank in the global private banking industry, providing financial advisory services to approximately 22,200 Latin American customers as of December 31, 2009. In addition, the company provides its customers with a range of traditional banking products and services. Financial advisory services are provided by teams of experienced relationship managers located in Brazil, Miami, Argentina, Uruguay, Chile and Paraguay. The company's private banking client base composes clients from Brazil, Argentina, Venezuela, Chile, Uruguay, Ecuador, Paraguay, Mexico, and other Latin American countries.

The company serves its customers' needs for offshore wealth management solutions in three major jurisdictions through independent institutions: in the United States through Banco Itaú Europa International (BIEI) and Itaú Europa Securities (IES); in Luxembourg through Banco Itaú Europa Luxembourg (BIEL); and in the Caribbean, through BIE Bank & Trust in the Bahamas (BIE Bahamas) and Unicorp Bank & Trust in Ca

The above Company Fundamental Report is a half-ready report and contents are subject to change.

It means that we have all necessary data in our database to prepare the report but need **2-3 days** to complete it. During this time we are also updating the report with respect to the current moment. So, you can get all the most recent data available for the same price. Please note that preparation of additional types of analyses requires extra time.

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## ANALYSIS FEATURES

### SWOT Analysis

SWOT, which stands for Strengths, Weaknesses, Opportunities and Threats, is an analytical framework that identifies the internal and external factors that are favorable and unfavorable for a company.

### Enhanced SWOT Analysis

Enhanced SWOT is a 3x3 grid that arranges strengths, weaknesses, opportunities and threats into one scheme:

How to use the strengths to take advantage of the opportunities?

How to use the strengths to reduce likelihood and impact of the threats?

How to overcome the weaknesses that obstruct taking advantage of the opportunities?

How to overcome the weaknesses that can make the threats a reality?

Upon answering these questions a company can develop a project plan to improve its business performance.

### PESTEL Analysis

PESTEL (also termed as PESTLE) is an ideal tool to strategically analyze what influence different outside factors – political, economic, sociocultural, technological, environmental and legal – exert on a business to later chart its long term targets.

Being part of the external analysis when carrying out a strategic assessment or performing a market study, PESTEL gives an overview of diverse macro-environmental factors that any company should thoughtfully consider. By perceiving these outside environments, businesses can maximally benefit from the opportunities while minimizing the threats to the organization.

## Key Factors Examined by PESTEL Analysis:

**Political** – What opportunities and pressures are brought by political bodies and what is the degree of public regulations' impact on the business?

**Economic** – What economic policies, trends and structures are expected to affect the organization, what is this influence's degree?

**Sociological** – What cultural and societal aspects will work upon the demand for the business's products and operations?

**Technological** – What impact do the technological aspects, innovations, incentives and barriers have on the organization?

**Environmental** – What environmental and ecological facets, both locally and farther afield, are likely to predetermine the business?

**Legal** – What laws and legislation will exert influence on the style the business is carried out?

## **IFE, EFE, IE Matrices**

The Internal Factor Evaluation matrix (IFE matrix) is a strategic management tool helping audit or evaluate major weaknesses and strengths in a business's functional areas. In addition, IFE matrix serves as a basis for identifying and assessing relationships amongst those areas. The IFE matrix is utilised in strategy formulation.

The External Factor Evaluation matrix (EFE matrix) is a tool of strategic management that is typically utilised to assess current market conditions. It is an ideal instrument for visualising and prioritising the threats and opportunities a firm is facing.

The essential difference between the above mentioned matrices lies in the type of factors incorporated in the model; whilst the latter is engaged in internal factors, the former deals exceptionally with external factors – those exposed to social, political, economic, legal, etc. external forces.

Being a continuation of the EFE matrix and IFE matrix models, the Internal External matrix (IE matrix) rests upon an investigation of external and internal business factors

integrated into one suggestive model.

## **Porter Five Forces Analysis**

The Porter's five forces analysis studies the industry of operation and helps the company find new sources of competitive advantage. The analysis surveys an industry through five major questions:

What composes a threat of substitute products and services?

Is there a threat of new competitors entering the market?

What is the intensity of competitive rivalry?

How big is the bargaining power of buyers?

How significant is the bargaining power of suppliers?

## **VRIO Analysis**

VRIO stands for Value, Rarity, Imitability, Organization. This analysis helps to evaluate all company's resources and capabilities and bring them together into one aggregate table that includes:

Tangible resources

Financial

Physical

Technological

Organizational

Intangible resources

Human

Innovation and Creativity

## Reputation

### Organizational capabilities

The result of the analysis gives a clear picture of company's competitive and economic implications, answering the questions if the resources mentioned above are:

Valuable?

Rare?

Costly to imitate?

Organized properly?

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