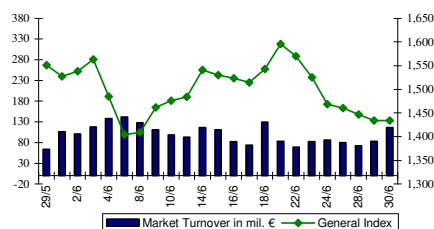


Daily Market Report



Thursday, 01 July 2010

BETA SECURITIES SA
Member of the Athens Stock Exchange



Greek Indices	Value	Chg: %	30 days %	YTD %
Athens General	1,434	0.0%	-8.7%	-34.7%
FTSE /ASE 20	675	0.3%	-10.8%	-40.0%
FTSE /ASE Mid 40	1,724	-0.4%	-6.0%	-34.0%

International Indices	Last Price	Chg: %	30 days %	YTD %
Dow Jones	9,774	-1.0%	-3.6%	-6.3%
Nasdaq	2,109	-1.2%	-6.5%	-7.0%
S&P 500	1,031	-1.0%	-5.4%	-7.6%
FTSE-100	4,917	0.1%	-5.2%	-9.2%
DAX-30	5,966	0.2%	0.3%	0.1%
CAC-40	3,443	0.3%	-2.1%	-12.5%
NIKKEI-225	9,200	-1.9%	-5.8%	-12.8%
HANG SENG	20,129	-0.6%	1.8%	-8.0%

Market Statistics

Market Turnover (in mil. euros)	115.8
Advances	101
Declines	81
Unchanged	39
Total Movers	221

Futures Delivery	Settlement	Prem/Dis c	Open Interest	Traded Volume
FTSE /ASE 20				
September 2010	664.47	-1.52%	24,484	15,897
December 2010	644.98	-4.41%	104	0

Short Selling (SS)	Short Selling Trade Value	% in total volume	Buy to close trade value	% in total volume
Jumbo			171,860	5.38

	Calendar of Events	
	Ex dividend	Dividend
Ellaktor	29-Jun	0.1
PPC	01-Jul	1
J&P Avax	02-Jul	0.04
Hellenic Petrol	05-Jul	0.3
Athens Water	06-Jul	0.02
Sarantis	06-Jul	0.01
Frigoglass	07-Jul	0.1
OTE	09-Jul	0.19
Thessalini Water	19-Aug	0.13

Results

Hellenic Exchanges	28-Jul	
Coca Cola	29-Jul	8:30 am
Titan Cement	26-Aug	
EFG Eurobank	26-Aug	
OPAP	26-Aug	
Bank of Piraeus	27-Aug	before market
ETE	27-Aug	17:30

Market Comment

Stocks declined slightly on Wednesday, with traded volume increasing. The composite index reached 1434.22 pts, down 0.01pct. Turnover at 115.78 million euros. Most up stocks: ATE Bank 1.03 euros (+5.10%), Viohalco 3.35 euros (+4.04%), Piraeus Bank 3.49 euros (3.87%), BoC 3.30 euros (+3.45), Coca Cola Hellas 17.63 euros (+3.34%), Marfin Bank 1.41 (+2.92). Most down stocks: Mytilinaios 3.85 euros (-3.75%), Ellaktor 2.76 euros (-3.50%), Motor Oil 7.20 (-3.36%), PPC 11.78 (-3.28%). The yield spread between the 10-year Greek and German benchmark bonds eased to 790 basis points on Wednesday, from 807 bps the previous day, in the Greek electronic secondary bond market. The Greek bond yielded 10.47 pct and the German Bund 2.56 pct. Negative sentiment in the international markets and efforts for window dressing are likely to have an effect on the market.

Corporate

NBG/ The bank said in a press release that it does not intend to raise equity capital, in particular through a share capital increase denying earlier press reports. Also, the bank is not in talks to sell a stake to the Qatar Investment Authority. Financial Times mentioned that the sovereign wealth fund might buy a stake of as much as 7 percent in the bank, worth about 250 million euros. In other news, Finance Bank 1st half after tax income is estimated to reach 260-265 million euros, an increase of 21% relatively to last year's 1st half results, according to press reports.

Motor Oil Hellas/ The company completed the purchase of the downstream assets of Royal Dutch Shell Plc for a price of 245.6 million euros.

Macro

Savers continued withdrawing money from Greek banks in May. The Bank of Greece, said total saving deposits by enterprises and households fell to 220.05 billion euros at the end of May, from 237.98 billion euros in early 2010, for a decline of 7.5 pct. The central bank said Greek households withdrew around 3.0 billion euros from financial institutions in May with their total saving deposits falling to 183.4 billion euros at the end of the first five months of the year, from 196.8 billion at the start of 2010, for a decline of 7.0 pct. Deposits by Greek enterprises also fell to 31.88 billion euros at the end of May from 36.3 billion euros in early 2010, for a decline of 12.3 pct.

Eurozone/ Inflation at 1.4% during the month of June, in line with the estimates (1.5%). The previous figure was 1.6%.

Other News

Earnings diminished in the retail sector during April. The index of earnings (fuel not included), dropped by 4.1% relatively to April 2009.



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