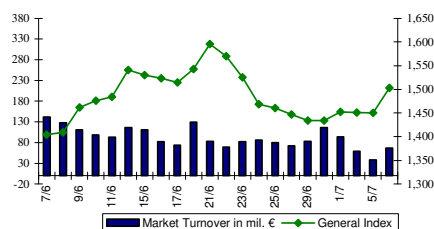


# Daily Market Report



Wednesday, 07 July 2010

BETA SECURITIES SA  
Member of the Athens Stock Exchange



Greek Indices	Value	Chg: %	30 days %	YTD %
Athens General	1,503	3.7%	1.2%	-31.6%
FTSE / ASE 20	713	4.3%	0.6%	-36.6%
FTSE / ASE Mid 40	1,757	1.3%	2.0%	-32.8%

International Indices	Last Price	Chg: %	30 days %	YTD %
Dow Jones	9,744	0.6%	-0.7%	-6.6%
Nasdaq	2,094	0.1%	-3.7%	-7.7%
S&P 500	1,028	0.5%	-2.1%	-7.8%
FTSE-100	4,965	2.9%	-2.1%	-8.3%
DAX-30	5,941	2.1%	0.6%	-0.3%
CAC-40	3,423	2.7%	0.3%	-13.0%
NIKKEI-225	9,263	-0.8%	-2.7%	-12.2%
HANG SENG	19,840	-1.2%	2.4%	-9.3%

Market Statistics	
Market Turnover (in mil. euros)	67.3
Advances	106
Declines	52
Unchanged	55
Total Movers	213

Futures Delivery	Settlement	Prem/Dis c	Open Interest	Traded Volume
FTSE / ASE 20				
September 2010	705.83	-1.04%	22,021	7,057
December 2010	688.2	-3.52%	107	...

Short Selling (SS)	Short Selling Trade Value	% in total volume	Buy to close trade value	% in total volume
Alpha Bank			107,446	1.74
Eurobank			102,600	3.77
Piraeus Bank			92,249	4.31

Calendar of Events			
	Ex dividend	Dividend	AGM
Hellenic Petrol	05-Jul	0.3	02-Jun
Athens Water	06-Jul	0.02	04-Jun
Sarantis	06-Jul	0.01	30-Jun
Frigoglass	07-Jul	0.1	
OTE	09-Jul	0.19	
Thessaliniiki 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		
Hellenic Duty Free	26-Aug		
Bank of Piraeus	27-Aug	before market	
ETE	27-Aug	17:30	
Alpha Bank	31-Aug	8:30 am	

## Market Comment

Greek market ended higher yesterday at 1,503 (+3.7%) with 67.3m euros total volume. Greek banks +4.61%. Most up stocks: Ellaktor +7.37% (3.06 euros), EFG +6.78% (4.25euros), Jumbo +5.77%(5.50euros), EEEK +5.05%(15.52euros), Motor Oil +5.03% (7.93euros). Most down stocks: Vivartia -8.98% (18.45euros). The yield spread between the 10-year Greek and German benchmark bonds fell to 765 basis points, from 778 bps on Monday. European markets are set to open lower today. Investors interest remains low.

## Corporate

Intralot/ Ordinary General Assembly approved the issue of convertible bond loan, with seven years duration and up to the amount of 200m euros.

Jumbo / For the financial year July 2009 - June 2010 the Group posted a 4.17% sales increase reaching 487.5m euros slightly above our estimates for 485m euros.

In Greece the company had satisfactory sales performance despite the fact that there were no additions to the company's network. Cyprus performance on sales had a double digit growth. Regarding Bulgaria, the new store at Plovdiv contributed to the sales growth that the country demonstrated at the financial year July 2009-June 2010.

The current financial year July 2010- June 2011 starts with the launch of the Group's second store in Sofia in August 2010. The challenging macroeconomic environment is expected to affect negatively the sales' performance of the existing store.

The company until December 2010 it is expected to begin its operations the new hyper-store in Cyprus one more hyper-store in Sofia of total surface while in Greece the company has planned the opening of a store in Preveza and in Ioannina.

## Other News

Greece will issue 26- and 52-week T-bills on July 13 to refinance maturing short-term government paper, according to Reuters. The amount will be announced on Friday by the country's debt management agency (PDMA). The news agency notes that EUR2.16 billion of 6 and 12-month T-bills expire July 16. On July 20th there would be another auction of 13-week T-bills.

News on Greece since April's last rating have been more positive, Fitch said Tuesday. The risk of a double-dip recession is less than 50 percent and is not the agency's central forecast.

Greek Finance Minister George Papaconstantinou said the establishment of a 10 billion euro bank-stability fund will provide a safety net for the country's lenders. The Financial Stability Fund for Greek banks was agreed upon with the International Monetary Fund and euro-area nations as part of a 110 billion- euro financial-aid package for Greece.



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