

Daily Market Report



Tuesday, 13 April 2010

BETA SECURITIES SA
Member of the Athens Stock Exchange



Greek Indices	Value	Chg: %	30 days %	YTD %
Athens General	2,061	3.5%	-2.6%	-6.2%
FTSE /ASE 20	1,025	4.0%	-3.2%	-9.0%
FTSE /ASE Mid 40	2,331	2.9%	-5.5%	-10.8%

International Indices	Last Price	Chg: %	30 days %	YTD %
Dow Jones	11,006	0.1%	3.6%	5.5%
Nasdaq	2,458	0.2%	3.8%	8.3%
S&P 500	1,196	0.2%	4.0%	7.3%
FTSE-100	5,778	0.1%	2.7%	6.7%
DAX-30	6,251	0.0%	5.1%	4.9%
CAC-40	4,051	0.0%	3.1%	2.9%
NIKKEI-225	11,122	-1.2%	3.5%	5.5%
HANG SENG	22,014	-0.6%	3.8%	0.6%

Market Statistics

Market Turnover (in mil. euros)	348.4
Advances	163
Declines	40
Unchanged	34
Total Movers	237

Futures Delivery	Settlement	Prem/Disc	Open Interest	Traded Volume
June 2010	1,017.18	-0.72%	24,961	13,800

Short Selling (SS)	SS Trade Value	% in total vol.	Buy to close Trade Value	% in total vol.
NBG			7,688,724	4.79
BoP	40,200	0.19	4,949,051	23.71
Alpha Bank	14,207	0.04	5,095,143	13.65
EFG Eurobank			1,465,872	6.53

Calendar of Events

29-Apr	Coca Cola Q110 Results - Pre market
13-May	Mytilineos - Ex dividend
14-May	OPAP Ex dividend (1.10 euros)
26-May	Hellenic Exchanges - Ex dividend
21-Jun	Fourlis Ex dividend
23-Jun	Coca Cola Ex dividend (0.30euros)
9-Jul	HTO - Ex dividend (0.50 euros)

Market Comment

Greek stock market ended sharply higher on Tuesday led by banks, fuelled by the Sunday decision on a Greek aid package reached by Eurogroup. The General Index gained 3.5% reaching 2,061. Total volume at 348.4m euros. Most up stocks: EFG 11.29%, BoP +9.32%, Titan +7.54%. The yield spread between the 10-year Greek and German benchmark bonds shrank significantly to 353 basis points from 399 bps on Friday, although off the day's lows of 332 bps.

Greece will auction 26- and 52-week bills today seeking 1.2 billion euros.

Other News

Germany may contribute 8.4 billion euros, or 28 percent, of an EU aid package for Greece, Finance Ministry spokesman Michael Offer said. Germany would finance the aid through loans from the state-owned KfW development bank with a government guarantee, Offer told reporters in Berlin today. German lawmakers would have to scrutinize any aid package, he said.

The agreement by euro-zone finance ministers Sunday on how they would support Greece if necessary "is a positive step that could help restore market confidence in the Greek government's efforts to mend its finances," Moody's Investors Service Inc. said to Dow Jones Newswires. The support could also halt the waning confidence in the Greek banking system.

Greek government will hold a road show in the United States at the end of the month, for the sale of dollar bonds, a government official told Dow Jones Newswires.

Corporate News

HTO / Fitch affirms OTE at BBB – Outlook Stable

NBG, Alpha Bank, Marfin Popular / Fitch Downgrades NBG's covered bonds to A+ from AA, Alpha Bank's covered bonds to AA- from AA+ and Marfin Popular Bank covered bond to AA- from AA.

Frigoglass / CEO expects double digit growth + better EBITDA for 1Q 2010



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