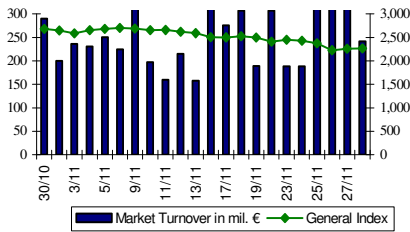


Daily Market Report



Tuesday, 01 December 2009

BETA SECURITIES SA
Member of the Athens Stock Exchange



Market Comment

General Index rose 0.3% on Monday. Banks ended up mixed with ETE (-2.54%), EUROOB (+2.67%), Alpha Bank (+5.17%). EEEK closed 3.80% higher while OPAP and Hellenic Petroleum declined 0.19% and 1.26% respectively. Trading volume stood at €241.9m. European markets are seen opening higher focusing on numerous macro news such as EU Unemployment rate.

Greek Macro

Greek Sep retail sales drop 8.7% y/y
Greece's retail sales by volume fell 8.7 percent year-on-year in September after a 4.5 percent drop in August. Retail sales by revenues dropped 7.5 percent year-on-year in September after a 3.1 percent drop the previous month. Tighter credit and rising unemployment as Greece's economy slows sharply have hurt retail sales so far this year, in line with broader euro region trends.

%

KEY FIGURES

	SEP	AUG	JULY
Retail sales by volume (y/y)	-8.7	-4.5	-10.2
Retail sales by revenue (y/y)	-7.5	-3.1	-9.1

%

	SEP	AUG
Supermarkets	-8.0	-2.7
Department stores	-18.8	-13.1
Fuels, lubricants	-2.6	-0.6
Food, beverage, tobacco	-3.3	-0.9
Drugs, cosmetics	+8.1	+6.3
Apparel, footwear	-7.9	+17.6
Furniture, appliances	-12.2	-8.9
Books, paper goods	-24.7	-27.4

Corporate

Bank of Cyprus / According to the Bank of Cyprus Dividend Reinvestment Plan the price at which the interim dividend for 2009 will be reinvested into shares is €4.25.

Reinvestment of the interim dividend was requested by shareholders who hold approximately 45% of the shares that are eligible to the interim dividend.

World Economy

EU

Consumer Price Index (YoY) (Nov) increased 0.6% (estimates: 0.5%, previous: -0.1%)

United States

Chicago Purchasing Managers' Index (Nov) at 56.1 (estimates: 53.2 previous: 54.2)

Greek Indices	Value	Chg: %	30 days %	YTD %
Athens General	2,263.27	0.3%	-15.7%	26.7%
FTSE/ASE 20	1,178.28	0.4%	-17.6%	26.4%
FTSE/ASE Mid 40	2,575.85	0.0%	-14.3%	35.5%

International Indices	Closing	Chg: %	30 days %	YTD %
Dow Jones	10,344.84	0.3%	6.5%	17.9%
Nasdaq	2,144.60	0.3%	4.9%	36.0%
S&P 500	1,095.63	0.8%	5.7%	21.3%
FTSE-100	5,190.68	-1.0%	2.9%	17.1%
DAX-30	5,625.95	-1.0%	3.9%	17.0%
CAC-40	3,680.15	-1.1%	2.0%	14.4%
NIKKEI-225	9,572.20	2.4%	-4.6%	8.0%
HANG SENG	21,940.79	0.5%	0.9%	52.5%

Market Statistics

Market Turnover (in mil. euros)	241.9
P/E 2009 Beta Universe	10.0
Advances	100
Declines	99
Unchanged	57
Total Movers	256

Futures Delivery	Settlement	Pre/Dis c	Open Interest	Traded Volume
March 2010	1,143.76	-2.93%	13	12
December 2009	1,154.06	-2.06%	26,841	8,921

Calendar of Events

07/12/2009	Motor Oil - Ex interim dividend (0.20 euros)
07/12/2009	Alpha Bank - Trading of new shares from capital increase
08/12/2009	Agrotiki Bank - AGM
09/12/2009	AGM Jumbo
14/12/2009	Emporiki Bank - EGM capital raise
15/12/2009	PPC EGM
16/12/2009	OPAP -Ex interim dividend (0.65 euros)
23/12/2009	Jumbo - ex dividend 2008/2009 (0.23 euros)



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