

Daily Market Report



Tuesday, 06 April 2010

BETA SECURITIES SA
Member of the Athens Stock Exchange



Greek Indices	Value	Chg: %	30 days %	YTD %
Athens General	2,095	1.3%	6.4%	-4.6%
FTSE /ASE 20	1,040	1.4%	5.7%	-7.6%
FTSE /ASE Mid 40	2,400	0.6%	2.8%	-8.2%

International Indices	Last Price	Chg: %	30 days %	YTD %
Dow Jones	10,974	0.4%	3.9%	5.2%
Nasdaq	2,430	1.1%	4.4%	7.1%
S&P 500	1,187	0.8%	4.3%	6.5%
FTSE-100	5,745	1.1%	2.6%	6.1%
DAX-30	6,236	1.3%	6.1%	4.7%
CAC-40	4,034	1.5%	3.2%	2.5%
NIKKEI-225	11,245	-0.8%	8.4%	6.6%
HANG SENG	21,537	1.4%	3.6%	-1.5%

Market Statistics

Market Turnover (in mil. euros)	104.4
Advances	89
Declines	62
Unchanged	60
Total Movers	211

Futures Delivery	Settlement	Prem/Disc	Open Interest	Traded Volume
June 2010	1,019.31	-2.02%	24,777	6,000

Short Selling (SS)	SS Trade Value	% in total vol.	Buy to close Trade Value	% in total vol.
NBG	1,506,181	6.4		
MIG	1,383,970	37.13		
3E	676,414	10.18		

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 market advanced on Thursday in light trading. The General Index ended 1.3% at 2,095. Total turnover at 104.4m euros. Banks advanced 1.70%. Most up: 3E +4.41%, BoC +4.27%, EFG +2.94%. The yield spread between the 10-year Greek and German benchmark bonds was 344 basis points on Thursday, with the Greek bond yielding 6.57 pct. Market will be focused on macros with trend uncertain and volumes low.

Greek Macro

Greece's Purchasing Managers' Index (PMI) fell to 42.9 points in March, to an 11-month low, indicating a sharp worsening in the health of the manufacturing sector in the country.

Other News

IMF in Athens this week to assist in tax evasion.

Possible announcement of privatisation schedule this week

\$ bond issue expected this month range \$5-10bn

Corporate News

Hellenic Postbank / Took control of Aspis Bank after acquiring a 32.9 pct equity stake through a share capital increase plan procedure. Aspis Bank announced the completion of the share capital increase plan at a rate of 68.84 pct, with the bank raising 52,918,467 euros from the market.

Under the plan, an annual extraordinary general shareholders' meeting is expected to approve a plan to change Aspis Bank's name and corporate identity.



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