



DAILY

MARKET REVIEW

| 6 June, Thursday

2013

REVIEW OF WORLD STOCK MARKETS

Sales swept all foreign exchanges. Throughout the day, European markets were under selling pressure, including on the back of weak statistics on the Eurozone economy – the data on retail sales in April, business activity in the services sector in May were worse than expected. Ambiguous economic reports from the U.S. did not add optimism to investors, including, in light of the potential impact of the Fed's decision to withdraw from incentive programs: the growth of new jobs in May was worse than expected, according to ADP Employer Service, the increase in orders of industrial enterprises in April did not meet expectations, the fall in labour costs in the I quarter was the highest since 1947, business activity in the service sector in May was slightly better than expected. At the end of the trading session, the European DJStoxx 600 Index closed with a loss of 1.49%, the US S&P 500 Index fell by 1.38%.

REVIEW OF THE RUSSIAN STOCK MARKET

The Russian market is trying to find support levels. Before the opening of trading some moderately negative external background formed on the Russian market on June 5. Most of the day the Russian market was in a percentage minus. In addition to the weak closure of America and the collapse of the Japanese market the statistics on the Eurozone economy contributed to the sales. The Russian indices ended the day near the day's lows, due to more than a half-point reduction in the U.S. market at the beginning of the day. At the end of the day, the MICEX Index lost 1.11% to close trading at 1,326.78 points, the RTS Index fell by 1.61% to close at 1,301.08 points. The MicexPWR Sector Index decreased by 2.49%, reaching 1,147.79 points. The main contribution to the reduction of MicexPWR - about 55% - was made by FGC and IDGC Holding, which were under pressure from media reports on proposals of FGC's head to increase investment programs of the electric grid companies.

ELECTRIC POWER INDUSTRY NEWS

Investment programs of FGC and Russian Grids need to be increased by 29% and 47%, respectively

Investment program of FGC and Russian Grids (formerly IDGC Holding) should be increased to 200 billion rubles and 250 billion rubles per year, respectively, to provide replacement of obsolete equipment and the required level of development of transmission facilities; investments are expected to attract from off-tariff sources, told reporters FGC's head Oleg Budargin.

To read full text: <http://www.bigpowernews.ru/news/document50157.phtml>

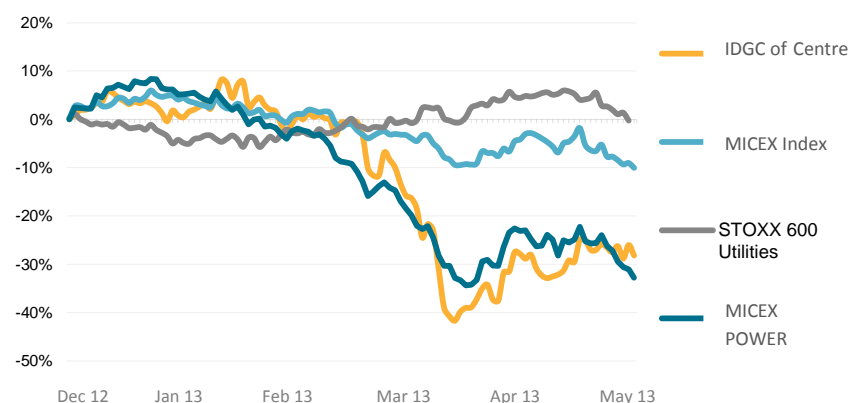
COMPANY NEWS

Orelenergo increases the accuracy of energy metering

IDGC of Centre — Orelenergo division is implementing a program of modernization of metering in the retail electricity market, within which specialists install «smart» electric meters on the balance participation boundary with the consumers.

To read full text: http://www.mrsk-1.ru/ru/press/news/branches/?id_4=88518

DYNAMICS OF KEY INDEXES AND SHARES OF THE COMPANY



World indexes	Value	Change for the day	Change from 31.12.12
MICEX	1 326,78	-1,11%	-10,03%
S&P 500	1 608,90	-1,38%	12,81%
FTSE 100	6 419,31	-2,12%	8,84%
DJStoxx 600	295,12	-1,49%	5,52%
STOXX Utilities	258,34	-1,61%	-0,25%
Nikkei	13 014,87	-3,83%	25,20%
Bovespa	52 798,63	-2,26%	-13,38%

Source: Bloomberg, Company calculations

Raw	Value	Change for the day	Change from 31.12.12
Brent*, USD/bbl	103,04	-0,19%	-7,26%

* - June futures

Source: Bloomberg, Company calculations

Shares of IDGC of Centre	Value
Last transaction, RUR	0,4310
Capitalisation**, billion RUR	18,20
Capitalisation**, million USD	571,58

** - at the price of last transaction at MICEX

Source: Central Bank of Russia, Company calculations

Russian indexes	Change for the day	Change from 31.12.12
MICEX-Power Index	-2,49%	-32,78%
Shares of IDGC of Centre	-2,93%	-28,17%

Source: MICEX, Company calculations

Distribution grid companies	Change for the day	Change from 31.12.12
IDGC of Volga	-1,25%	-21,71%
MOESK	-1,14%	-13,91%
IDGC of Northern Caucasus	0,46%	-41,77%
IDGC of Centre and Volga Region	0,35%	-19,74%
IDGC of North-West	-0,02%	-35,15%
IDGC of Urals	4,05%	-16,28%
IDGC of Siberia	-2,43%	-8,60%
IDGC of South	-1,38%	-27,16%
Lenenergo	-3,34%	-35,84%

Source: MICEX, Company calculations

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Tickers

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