

# DAILY MARKET REVIEW

30 June, Thursday

2016



ROSSETI



IDGC OF CENTRE

## REVIEW OF STOCK MARKETS

Before the opening of trading on Wednesday 29 June some positive external background formed on the Russian market. On Tuesday the US indices DJIA and S&P500 rose by 1.6-1.8%, on Wednesday the composite Asia-Pacific region index MSCI Asia Pacific added more than 1%. The markets rose on expectations that leading central banks of the world would involve new incentives to limit the impact of the UK exit from the EU on the world economy. Oversold bank shares were a driver of rising stock indices. The Japanese Nikkei showed a rapid increase for the second day. According to media reports, Japanese Prime Minister instructed the Minister of Finance and the head of the central bank to take "all necessary measures" to support the economy and financial markets. August Brent futures traded near the mark of \$48.9 per barrel, a dollar above the closing level of 28 June. In addition to the general recovery in investors' interest in risky assets oil prices were further supported by the American Petroleum Institute (API) data, which reported the fall of oil reserves by 3.9 million barrels in the United States, and the continuing threat of a strike of oil workers in Norway.

On Wednesday Russian and European indices rose for the second consecutive trading session in anticipation of the expansion of incentives by world central banks. Against the background of high market turbulence macro statistics took back seat – in the Eurozone in June data for the composite index of business and consumer confidence in the region's economy were worse than expected, in the US in May the pace of growth of income and expenditure slowed down. In the second half of the trading session the MICEX Index and the European Stoxx Europe 600 Index added a percent and 2.5%, respectively. At the end of the day the Russian market growth accelerated after the rise of price of Brent above \$49.5 per barrel after the publication of the US Department of Energy data, which recorded the comparable in comparison with the API version reduction of oil reserves and production decline to the level of the beginning of September 2014.

During the trading session the MicexPWR Sector Index corresponded to the dynamics of the MICEX Index. The main contribution to the final growth of the sector indicator was made by shares of Inter RAO, adjusting after two days of active sales.

## ELECTRIC POWER INDUSTRY NEWS

### "Rosseti" and "SO UES" held a meeting on improving the efficiency of the process interaction

On Tuesday, 28 June 2016, at the initiative of PJSC "Rosseti" in Central Region Branch of JSC "SO UES" a technical meeting was held on the issues of increasing the efficiency of the process interaction between the Group of Companies "Rosseti", included in the operating service area of Central Region Branch of JSC "SO UES", with Central Region Branch of JSC "SO UES" and relevant Regional Dispatching Offices while performing their functions of the technological and operational dispatch management.

Read full text: [http://www.rosseti.ru/press/news/?ELEMENT\\_ID=27040](http://www.rosseti.ru/press/news/?ELEMENT_ID=27040)

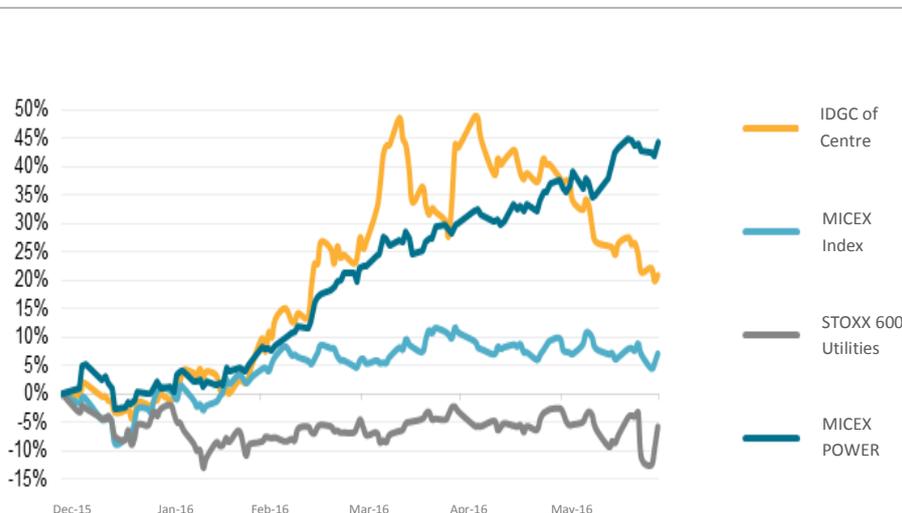
## COMPANY NEWS

### Bryanskenergo continues work on collecting receivables

IDGC of Centre - Bryanskenergo division continues to implement measures aimed at repayment of receivables for electricity transmission.

Read full text: <https://www.mrsk-1.ru/press-center/news/branches/56258/>

## DYNAMICS OF KEY INDEXES AND SHARES OF THE COMPANY



World indexes	Value	Change	
		per day	fr 31.12.15
MICEX	1 888,15	1,66%	7,20%
S&P 500	2 070,77	1,70%	1,31%
FTSE 100	6 360,06	3,58%	1,89%
DAX	9 612,27	1,75%	-10,53%
DJStoxx 600	326,49	3,09%	-10,75%
STOXX Utilities	288,74	4,33%	-5,68%
Nikkei	15 566,83	1,59%	-18,21%
Sensex	26 740,39	0,81%	2,38%
CSI300	3 151,39	0,48%	-15,53%
Bovespa	51 001,91	1,99%	17,65%

Source: Bloomberg, Company calculations

Currency rates	Value	Change	
		per day	fr 31.12.15
Euro/USD	1,11	0,42%	-8,71%
USD/RUB	64,81	-0,38%	-11,08%
Euro/RUB	71,71	-0,32%	-10,02%

Source: Bloomberg, Company calculations

Raw	Value	Change	
		per day	fr 31.12.15
Gold, USD/oz	1 319,15	0,56%	24,32%
Brent*, USD/bbl	50,61	4,18%	21,05%

\* - August futures

Source: Bloomberg, Company calculations

Shares of IDGC of Centre	Value
Last transaction, RUB	0,2360
Capitalisation**, billion RUB	9,96
Capitalisation**, million USD	153,73

Source: Central Bank of Russia, Company calculations

Russian indexes	Change	
	per day	fr 31.12.15
MICEX-Power Index	1,56%	44,24%
Shares of IDGC of Centre**	0,85%	20,96%

Source: Bloomberg, Company calculations

Grid companies	Change**	
	per day	fr 31.12.15
Rosseti	0,41%	33,19%
FGC UES	0,00%	157,58%
IDGC of Volga	0,52%	49,36%
MOESK	2,39%	19,87%
IDGC of Northern Caucasus	-0,36%	12,00%
IDGC of Centre and Volga Reg	1,49%	19,43%
IDGC of North-West	1,18%	56,93%
IDGC of Urals	3,28%	32,63%
IDGC of Siberia	2,04%	2,46%
IDGC of South	1,65%	18,59%
Lenenergo	1,05%	25,98%

Source: MOEX, Company calculations

\*\* - at the price of last transaction at MOEX

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**Tickers**  
Moscow Exchange (MOEX)  
Bloomberg  
Reuters

**MRKC**  
**MRKC RX**  
**MRKC.MM**