



IDGC OF CENTRE

# DAILY MARKET REVIEW

22 October, Thursday

2015

## REVIEW OF STOCK MARKETS

Before the opening of trading on Wednesday 21 October some moderately negative external background formed on the Russian market. On Tuesday the US indices DJIA and S&P500 fell 0.1%. According to the agency Bloomberg, market participants evaluated data on the housing market and the contradictory statements of large companies. On Wednesday the US futures rose, and the composite index of the Asia-Pacific region MSCI Asia Pacific added 0.8%. The markets were supported, in particular, by investors' expectations that the Bank of Japan to announce the expansion of stimulus at the meeting on 30 October, which increased after the publication of weak statistics on foreign trade – the country recorded a trade deficit at the end of the sixth month in a row. December Brent futures traded near the mark of \$48.3 per barrel – \$0.2 below our closing on 20 October. Oil prices were pressured with expectations of growth of stocks of fuel in the United States – according to the American Petroleum Institute (API) data, oil inventories in the US last week rose by 7.05 million barrels per day. Including at the terminal in Cushing, which stores traded on the NYMEX oil reserves, the increase was by 22 thousand barrels.

On Wednesday the Russian and European indices began the trading session with a decrease. European markets were pressured by a report of the ECB, which noted improvement in credit conditions in the Eurozone due to the program of quantitative easing and tightening competition in the banking sector, which, according to experts, reduces the possibility of increasing the incentive on the part of the Central Bank. In the afternoon the mood on the stock markets improved, and the MICEX Index was able to play some losses back against the background of a reversal of European indices and positive dynamics of US futures. Additional support to investor's sentiment was given by growth of US exchanges at the opening on the background of good corporate reporting. At the end of the day restoration of the Russian market slowed down amid growing volatility of oil prices after the publication of statistics of the US Department of Energy, which recorded significantly higher-than-expected growth of oil reserves in the country, continued for the fourth week in a row.

At the end of the trading session the MicexPWR Sector Index looked considerably better than the market. The main contribution to the final growth of the index was made by grown on increasing volumes shares of FGC UES and Rosseti.

## ELECTRIC POWER INDUSTRY NEWS

### Foreign investors and Ministry of Energy do not want to subsidize the energy industry of the Far East

Read full text: <http://www.bigpowernews.ru/markets/document66813.phtml>

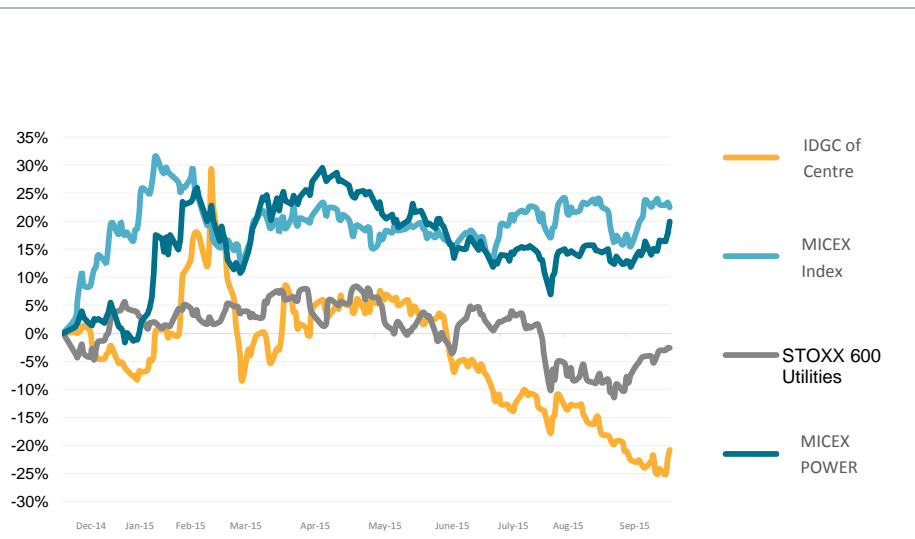
## COMPANY NEWS

### Events of the Forum "RUGRIDS-ELECTRO. Russian Grids. New Opportunities"

Key events of the first day were the debate "Electric Power Industry in Russia - a national technological way or a "mirror" of global trends of development?" and a round table, devoted to the effective interaction of small and large businesses in the electricity sector.

Read full text: <http://www.mrsk-1.ru/press-center/news/company/50329/>

## DYNAMICS OF KEY INDEXES AND SHARES OF THE COMPANY



World indexes	Value	Change for the day fr 31.12.14	
MICEX	1 709,94	-0,74%	22,44%
S&P 500	2 018,94	-0,58%	-1,94%
FTSE 100	6 348,42	0,05%	-3,32%
DAX	10 238,10	0,89%	4,41%
DJStoxx 600	362,64	-0,01%	5,87%
STOXX Utilities	307,16	-0,03%	-2,62%
Nikkei	18 554,28	1,91%	6,32%
Sensex	27 287,66	-0,07%	-0,77%
CSI300	3 473,25	-2,92%	-1,71%
Bovespa	47 025,87	-0,11%	-5,96%

Source: Bloomberg, Company calculations

Currency rates	Value	Change for the day fr 31.12.14	
Euro/USD	1,13	-0,05%	-6,67%
USD/RUB	62,16	1,17%	10,49%
Euro/RUB	70,53	1,07%	3,20%

Source: Bloomberg, Company calculations

Raw	Value	Change for the day fr 31.12.14	
Gold, USD/oz	1 167,18	-0,75%	-1,45%
Brent*, USD/bbl	47,85	-1,77%	-26,88%

\* - November futures

Source: Bloomberg, Company calculations

Shares of IDGC of Centre	Value
Last transaction, RUB	0,2000
Capitalisation**, billion RUB	8,44
Capitalisation**, million USD	135,83

Source: Central Bank of Russia, Company calculations

Russian indexes	Change for the day fr 31.12.14	
MICEX-Power Index	1,73%	19,91%
Shares of IDGC of Centre**	2,04%	-20,79%

Source: Bloomberg, Company calculations

Grid companies	Change** for the day fr 31.12.14	
JSC Russian Grids	9,56%	11,78%
FGC UES	6,80%	40,95%
IDGC of Volga	3,63%	-23,30%
MOESK	0,00%	-36,00%
IDGC of Northern Caucasus	2,55%	16,53%
IDGC of Centre and Volga Reg	0,29%	-29,40%
IDGC of North-West	1,48%	8,30%
IDGC of Urals	1,73%	34,53%
IDGC of Siberia	3,50%	-37,56%
IDGC of South	7,08%	12,62%
Lenenergo	1,75%	49,14%

Source: MOEX, Company calculations

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

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## Tickers

Moscow Exchange (MOEX)

Bloomberg

Reuters

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