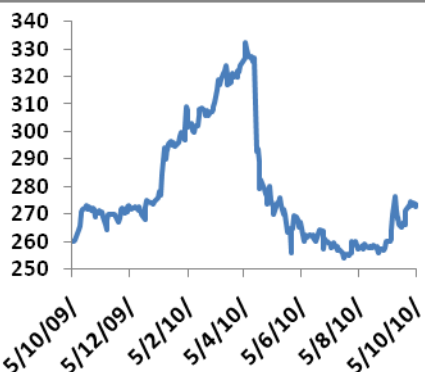




CROBEX 52wks PERFORMANCE: 	INDICES:	CLOSE	1D	1M	Y-T-D
	CROBEX	1.906.67	-0.21%	+1.61%	-4.53%
	CROBEX10	1.005.34	-0.35%	+1.28%	-5.00%
COMMENT: Croatian market remained immune to another strong upside move on foreign markets and liquidity dried up again. The Crobex finished the day 0.2 % lower, with total daily regular turnover slipping to only HRK 7.7 mn. With exception of shares in Croatian Telecom no other issuer generated turnover in excess of HRK 1 mn, while biggest movers were shares in Adris (down 2.2%) and Kraš (up 1.3%), both on very low volume. OUTLOOK: Strong gains on US and European markets could trigger a bounce on the Croatian market today.					

TURNOVER- HRK MN Total turnover: 20.05 Regular turnover: 7.73 OTC turnover: 0.00 Reported turnover: 12.31 Market Cap: HRK 170.41 bn FX MARKET EUR/HRK 7.291037 USD/HRK 5.290644	MARKET BREADTH ADVANCERS 28 DECLINERS 26 UNCHANGED 7 UP VOLUME 2,959,005.70 HRK DOWN VOLUME 4,388,234.95 HRK	TOP PERCENTAGE GAINERS: DIOK-R-A +9.64% FMPS-R-A +9.48% PIVK-R-A +9.17% EXPD-R-A +8.00% VLHO-R-A +7.62% TOP PERCENTAGE LOSERS: ZLTO-R-A -66.67% TNSA-R-A -13.08% SAPN-R-A -11.02% ZTNJ-R-A -5.93% HRDH-R-A -4.18%
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HT 52wks PERFORMANCE: 	POLITICS : No news today MACROECONOMY : No news today
RISING ON UNUSALLY HIGH TURNOVER: None FALLING ON UNUSALLY HIGH TURNOVER: None	

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IN FOCUS :

Banking sector – Net profit in the first eight months of 2010 dropped 15.8 %

According to latest data by the central bank in the first eight months of 2010 commercial banks generated net profit of HRK 2.66 bn, which was 15.8 % less than in the same period of last year. Beside rising provisions, one of the reasons for decline in net profit was surely slowdown of lending activity, as total loans increased by only 2.7 % y/y to HRK 261 bn. Most of the increase in lending was related to corporate sector, where total amount of loans rose 5.9 % y/y to HRK 100 bn. At the same time, within loans to households only housing loans recorded bigger growth rates, increasing 6.5 % y/y to HRK 55.4 bn, while car loans declined 17 % y/y to HRK 6.8 bn.

20 MOST LIQUID:

STOCK	OPEN	HIGH	LOW	CLOSE	CHANGE %	VOLUME	TURNOVER
HT-R-A	272.85	273.75	272.75	272.75	-0.24%	10,608	2,895,273.38
ATGR-R-A	811.00	819.98	810.01	817.17	0.14%	742	603,353.88
ATPL-R-A	800.01	804.00	790.00	798.01	-0.25%	654	522,774.19
ERNT-R-A	1,332.00	1,341.19	1,330.00	1,341.00	0.67%	376	502,297.35
INA-R-A	1,660.01	1,665.00	1,650.17	1,665.00	0.30%	271	448,956.13
PBZ-R-A	485.00	485.00	485.00	485.00	0.00%	676	327,860.00
PODR-R-A	288.00	290.00	283.64	283.64	0.15%	1,017	293,156.44
MIV-R-A	2,410.00	2,410.00	2,410.00	2,410.00	2.12%	85	204,850.00
IGH-R-A	1,528.05	1,539.99	1,514.00	1,520.01	-1.11%	123	186,755.79
KRAS-R-A	473.76	480.00	468.00	480.00	1.34%	350	166,586.83
ADRS-P-A	272.10	272.10	268.03	268.03	-2.18%	600	162,290.17
DLKV-R-A	269.50	271.00	268.41	271.00	0.96%	518	139,981.46
ZABA-R-A	239.00	240.00	238.00	238.00	-0.30%	581	138,428.74
ADPL-R-A	94.12	94.12	93.03	94.00	-1.05%	1,049	98,359.82
VLDS-R-A	11.40	11.58	11.01	11.50	1.50%	7,279	82,017.48
KORF-R-A	36.62	37.00	36.62	37.00	1.34%	2,111	78,064.82
OPTE-R-A	32.28	32.90	32.28	32.90	1.89%	2,201	71,396.29
LRH-R-A	2,489.00	2,500.00	2,489.00	2,500.00	1.99%	25	62,441.99
JDBA-R-A	2,850.00	2,850.00	2,730.01	2,730.01	-1.09%	20	55,452.24
PTKM-R-A	153.00	155.00	151.53	155.00	0.97%	340	51,995.86

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