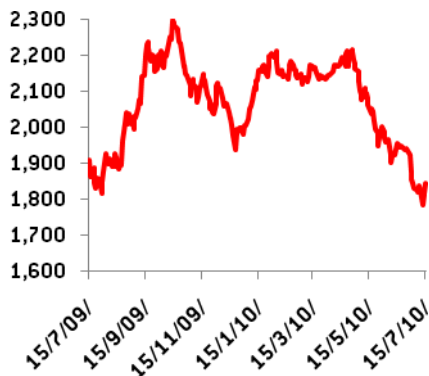




CROBEX 52wks PERFORMANCE:



INDICES:	CLOSE	1D	1M	Y-T-D
CROBEX	1,843.69	+1.56%	-5.53%	-7.68%
CROBEX10	984.29	+1.53%	-6.58%	-6.66%

COMMENT:

Driven by initially positive sentiment on European markets Croatian shares surged in the second half of the trading day, lifting the Crobex by 1.6%. The rally was led by shares in Zagrebačka banka, shipping- and construction sector, among which shares in Dalekovod generated unexpectedly high turnover of HRK 2.8 mn. The overall trading activity was unusually high as well, as regular turnover with equities amounted some HRK 20 mn.

OUTLOOK:

The market seems to offer more upside today.

TURNOVER- HRK	MN
Total turnover:	73.94
Regular turnover:	35.66
OTC turnover:	38.28
Reported turnover:	0.00

Market Cap: HRK 166.72 bn

FX MARKET

EUR/HRK	7.203478
USD/HRK	5.640496

MARKET BREADTH

ADVANCERS	36
DECLINERS	17
UNCHANGED	14

UP VOLUME

19,381,551.53 HRK

DOWN VOLUME

673,071.11 HRK

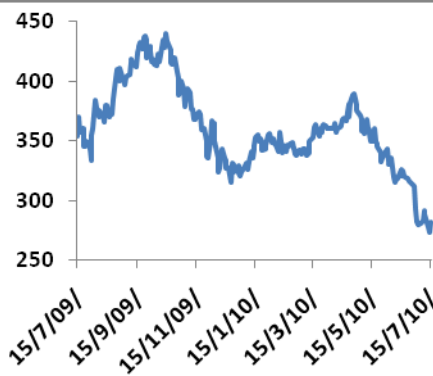
TOP PERCENTAGE GAINERS:

HPDG-R-A	+55.95%
SADM-R-A	+39.53%
HRBC-R-A	+16.42%
VLHO-R-A	+12.16%
HUPZ-R-A	+11.72%

TOP PERCENTAGE LOSERS:

LVCV-R-A	-8.16%
KODT-R-A	-7.93%
VPIK-R-A	-6.25%
TISK-R-A	-4.69%
HDEL-R-A	-2.94%

DLKV 52wks PERFORMANCE:



POLITICS :

No news today

MACROECONOMY :

The consumer price index fell in June by 0.1% m/m and its annual growth rate slowed to 0.7%, reported yesterday the Bureau of Statistics. It was the first monthly price decline since October 2009, which was predominantly affected by a 2.2% m/m decrease in prices of clothing and footwear and to a lesser degree by a 0.4% m/m fall of prices of food and beverages. At the same time upside pressure on the CPI came mostly from catering and accommodation services (up 1.7% m/m) and recreation and culture (up 1.8% m/m), which again came on the back of a sharp 25% m/m jump in prices of package holidays.

RISE ON UNUSALLY HIGH TURNOVER:

HT (Telecom), Dalekovod (Construction)

FALLING ON UNUSALLY HIGH TURNOVER:

None

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IN FOCUS :
Dalekovod (Construction) – Signed EUR 36.1 mn deal with Tehnika

The two companies announced yesterday that they signed EUR 36.1 mn deal on building the shopping centre Supernova in south part of Zagreb. The whole project, in total amount of EUR 80.7 mn was initially won by Dalekovod, which is now looking for subcontractors. The shopping centre is part of the Supernova Zagreb complex, whose total area is about 125,000 square meters and estimated value of EUR 250 mn.

20 MOST LIQUID:

STOCK	OPEN	HIGH	LOW	CLOSE	CHANGE %	VOLUME	TURNOVER
HT-R-A	256.99	258.00	255.10	256.99	0.11%	33,222	8,516,564.16
DLKV-R-A	274.02	282.00	273.00	282.00	3.30%	10,110	2,799,826.84
ERNT-R-A	1,272.00	1,316.00	1,260.00	1,316.00	2.10%	1,506	1,908,057.06
ADRS-P-A	259.00	263.00	256.32	263.00	1.54%	4,706	1,219,486.38
ATPL-R-A	745.00	774.00	737.00	773.90	3.88%	904	682,670.27
ZABA-R-A	208.17	210.00	207.00	210.00	4.33%	3,058	637,763.98
IGH-R-A	1,719.50	1,740.00	1,658.01	1,740.00	0.64%	276	471,978.52
LKPC-R-A	1,610.00	1,635.00	1,609.00	1,635.00	1.87%	266	428,847.85
PBZ-R-A	510.00	515.00	500.03	515.00	0.00%	778	394,358.06
ULPL-R-A	550.00	560.00	540.00	560.00	1.82%	639	353,897.66
PODR-R-A	272.00	280.00	270.00	280.00	2.94%	1,233	338,113.88
INA-R-A	1,655.02	1,679.90	1,655.02	1,661.01	-0.83%	162	269,259.91
PTKM-R-A	107.15	115.00	107.15	115.00	2.68%	2,360	265,814.15
ATGR-R-A	693.00	709.00	693.00	709.00	0.85%	341	240,160.85
KORF-R-A	30.50	31.37	30.49	31.00	-0.99%	7,675	237,116.61
JDPL-R-A	129.50	136.00	129.49	136.00	4.66%	1,643	219,436.30
INGR-R-A	23.00	24.11	22.80	24.01	4.39%	8,655	203,377.64
VDKT-R-A	241.00	249.95	236.00	249.95	4.15%	778	186,389.27
THNK-R-A	1,021.00	1,080.00	1,000.00	1,080.00	8.00%	120	126,054.57
ADRS-R-A	300.00	300.00	300.00	300.00	0.00%	400	120,000.00

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