

MARKET WATCH

BY: **YASSEN MAHMOUD**
(12 MAR - 06 APR)

MAY
2023



REAL ESTATE

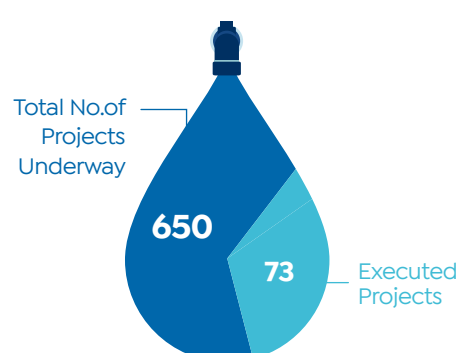
MARKET
UPDATES

01 | REAL ESTATE MARKET UPDATES 2023

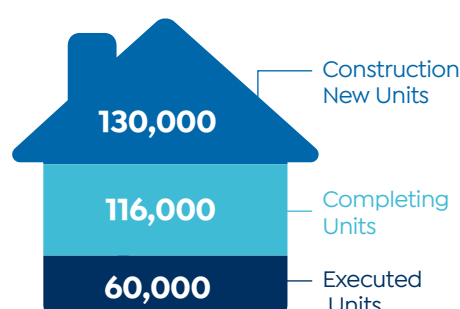
ECONOMIC & SOCIAL DEVELOPMENT PLAN'S TARGETS FOR FY(2023/24)

| Housing Sector

Potable Water & Sanitation Projects



Social Housing



Hayah Karima's Initiative

21,300 km	Completing Of Sanitation Networks
8,500 km	Completing Of Potable Water Networks
530	Construction Residential Buildings For Low-Income
167	Upgrading Sewage Treatment Stations
323	Upgrading Water Purification Plant

| Local Development



HOLDING COMPANY FOR WATER & WASTEWATER'S PERFORMANCE

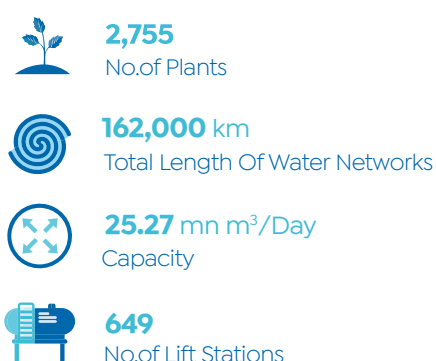


FY 2021/22
Time Period



EGP 6.0133 bn
Total Investments

| Potable Water Projects



| Sanitation Projects



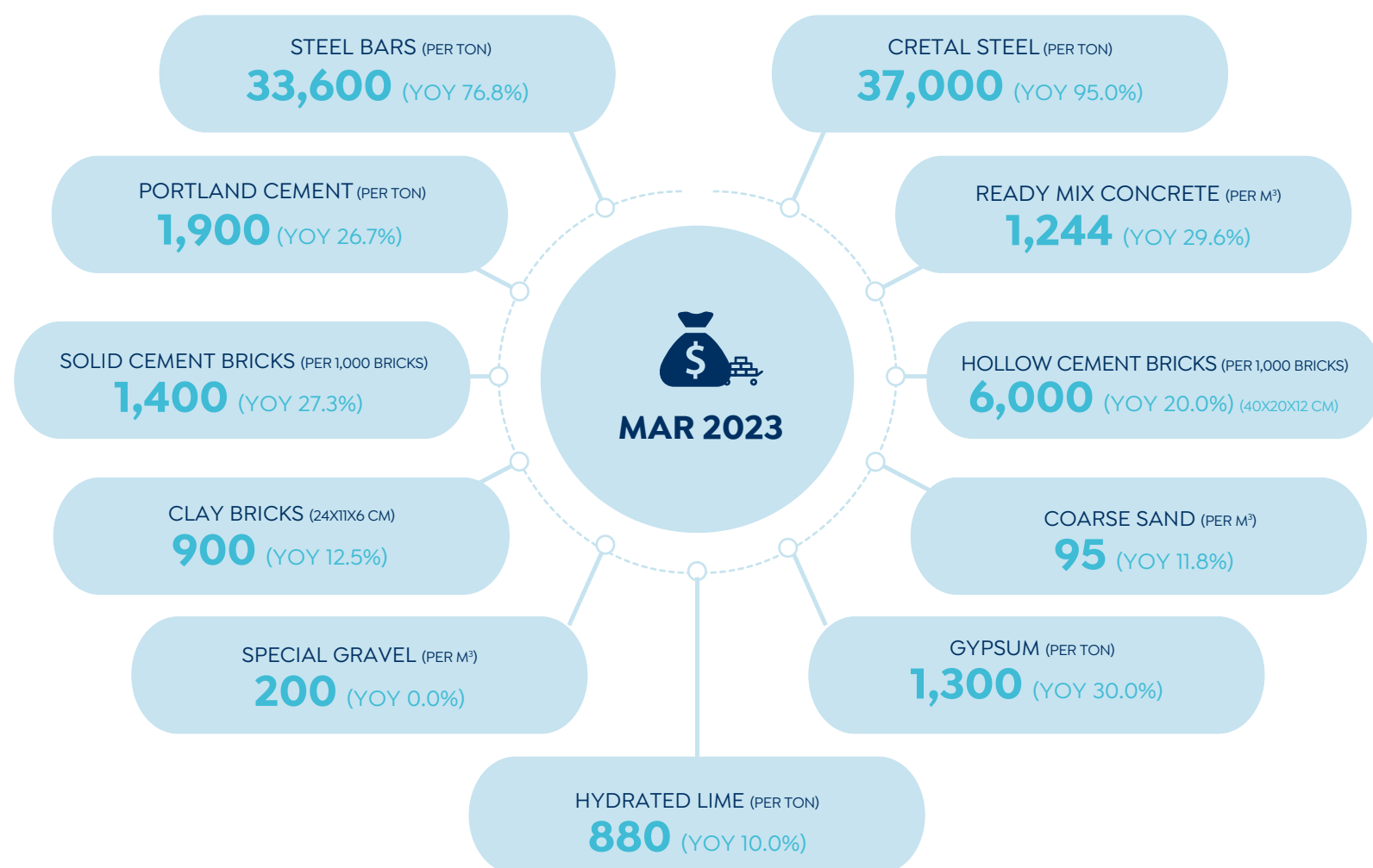
| Hayah Karima Initiative "Phase I"

EGP 33.3 bn
Total Investments

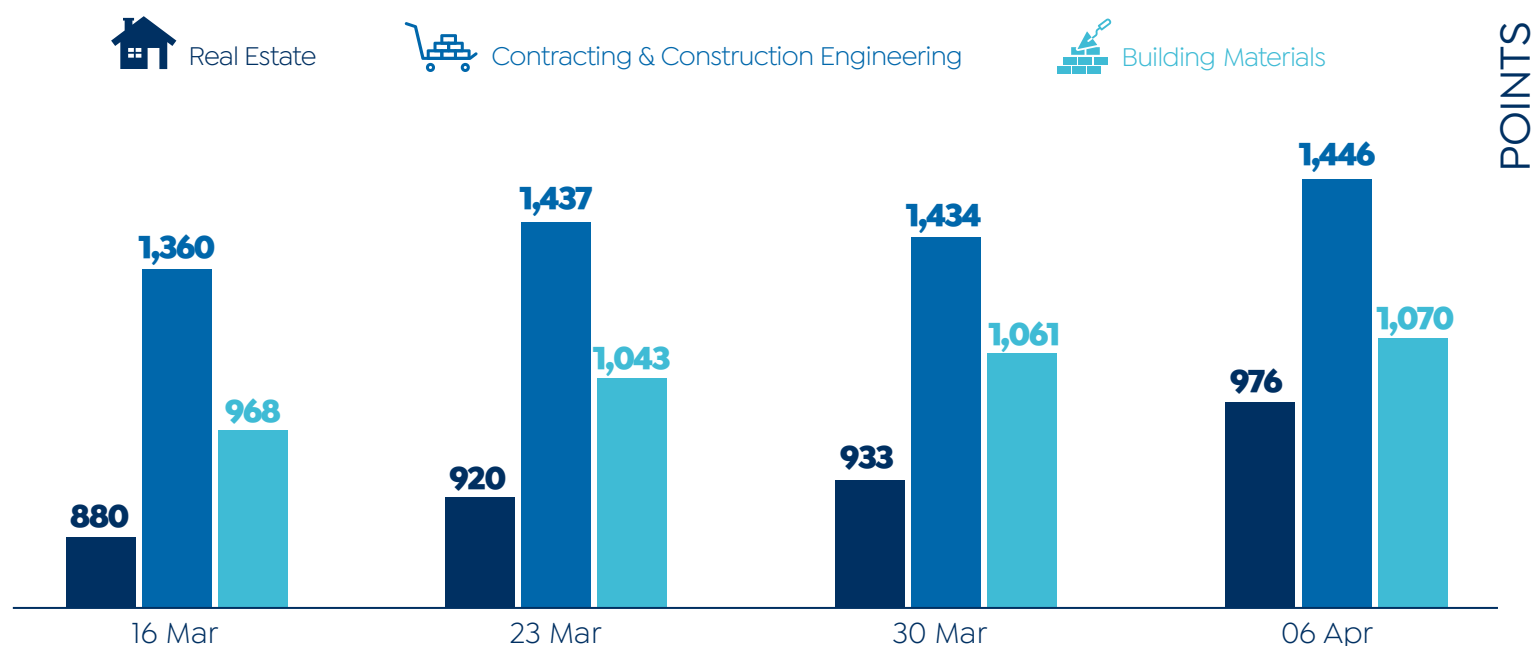
Breakdown

- Implementation Of Sanitation Projects In 21 Villages
- Implementation Of 8 Sewage Treatment Plants
- Improvement Of Potable Water Services In 170 Villages
- Expansion Of 48 Potable Water Plants
- Execution Of Water Networks In 602 Villages
- Execution Of Sanitation Networks In 101 Villages
- Others

PRICES OF CONSTRUCTION MATERIALS (EGP)



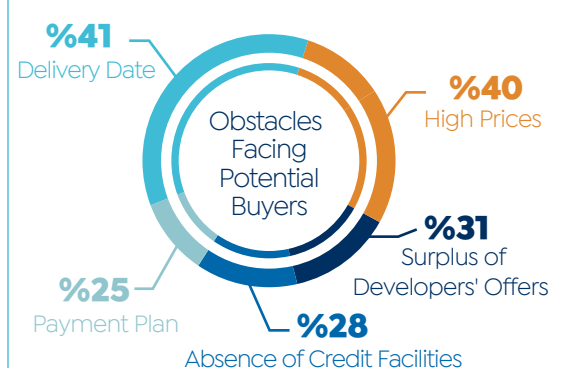
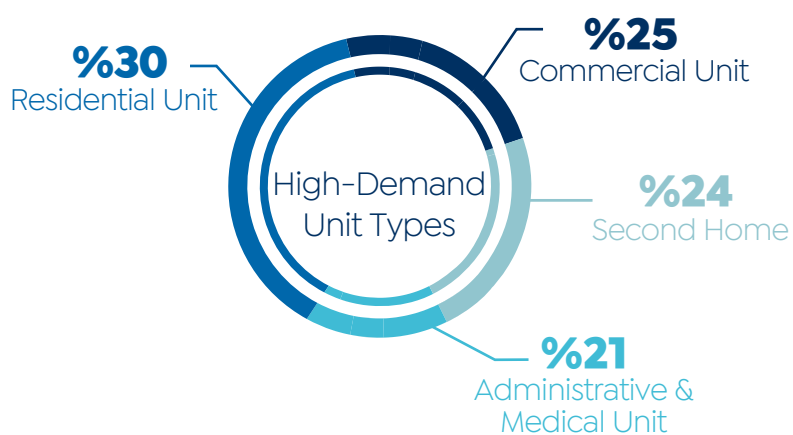
PERFORMANCE OF REAL ESTATE, CONSTRUCTION & BUILDING MATERIALS' INDICES IN THE EGYPTIAN STOCK MARKET



Source: MHUC & EGX

MONTHLY SURVEY

| Purchasing Power





NEW CITIES UPDATE

02 | NEW CITIES UPDATES 2023

CAPITAL GARDENS



29,435.5 Acres
AREA



90,000 +
NO.OF HOUSING FOR ALL
EGYPTIANS' UNITS

| Housing For All Egyptians "Phase V"



1,337
NO.OF BUILDINGS



90 m²
UNIT AREA

| Services Buildings

Schools

Nurseries

Medical Units

Playgrounds

Youth Centers

Bakeries

Commercial Markets

Mosque

Church

EL-SHEIKH ZAYED

| JANNA 2



111
NO.OF BUILDINGS



2,664
NO.OF HOUSING UNITS

| Phase I



50
NO.OF BUILDINGS



1,200
NO.OF HOUSING UNITS



Under Delivery
STATUS

15TH MAY CITY

| Housing For All Egyptians

| Al-Krnfl Area



91
NO.OF BUILDINGS



2,184
NO.OF HOUSING UNITS



EGP **1.2 bn**
INVESTMENTS



25%
COMPLETION RATE

| Al-Zahraa Area



203
NO.OF BUILDINGS



4,872
NO.OF HOUSING UNITS



EGP **2 bn**
INVESTMENTS

NEW CAIRO

| Housing For All Egyptians



3rd Settlement
LOCATION



222
NO.OF BUILDINGS



5,328
NO.OF HOUSING UNITS



90 - 120 m²
UNIT AREA



Underway
STATUS

SADAT CITY

| Housing For All Egyptians

| Al-Nour District



1,020
NO.OF HOUSING UNITS



90 m²
UNIT AREA



Underway
STATUS

| El-Firdous District



NO.OF HOUSING UNITS

2,000 (90 m²)

180 (75 m²)



Underway
STATUS

BADR CITY

| Residences For NAC's Employees

| Phase II



196
NO.OF BUILDINGS



4,704
NO.OF UNITS



87%
COMPLETION RATE

NEW ASSIUT CITY



27
NO.OF EXECUTED HOUSING BUILDINGS



5
NO.OF COMMERCIAL MARKETS UNDERWAY



10
NO.OF COMMERCIAL CENTERS FOR PRIVATE
SECTOR UNDERWAY



50 +
NO.OF ALLOCATED PLOTS



PRIVATE REAL ESTATE PROJECTS

UPDATE

03 | PRIVATE REAL ESTATE PROJECTS UPDATES 2023



NEW RESIDENTIAL PROJECTS

| NEW PROJECT (NAME N/A)

Developer: West Way Developments


LOCATION
New Zayed City


AREA
15 Acres


INVESTMENTS
EGP 750 mn

| LAKE VIEW

Developer: XLand Developments


LOCATION
Mokattam


AREA
10,000 m²


EXPECTED SALES
EGP 500 mn


DELIVERY DATE
Within 3 Yrs

SUPPLY VOLUME

- Social Club, Gym, Swimming Pools & Cafes
- Unit Area: 63 – 230 m²

| ROOTS

Developer: Raaed Developments


LOCATION
New Sohag City


AREA
87,000 m²


INVESTMENTS
EGP 1.8 bn

SUPPLY VOLUME

- Villas, Penthouses & Duplexes
- Commercial Mall, Social Club, Swimming Pools & Sports Fields
- No.of Villas: 12 (Unit Area: 500 m²)
- No.of Housing Buildings: 33 (496 Units)
- Unit Area: 140 – 270 m²



NEW COMMERCIAL PROJECTS

| NEW PROJECT (NAME N/A)

Developer: West Way Developments


LOCATION
New October City


AREA
4,400 m²


INVESTMENTS
EGP 1.25 bn



NEW COMPLEX PROJECTS

NEW PROJECT (NAME N/A)

Developer: West Way Developments



LOCATION

Sheikh Zayed



AREA

2,300 m²

INVESTMENTS

EGP 750 mn



UNIT TYPES

Commercial & Medical Units

NEW PROJECT (NAME N/A)

Developer: Khaled Sabry Holding



AREA

56 Acres



LAUNCHING DATE

Q2 2023

PALMA MALL

Developer: FSG Development



LOCATION

Downtown, NAC



AREA

5,500 m²

CONSTRUCTION RATE

30%

SUPPLY VOLUME

● Commercial & Administrative Units

● Ground & 14 Floors



PROJECTS UNDERWAY

SARAI

Developer: Madinet Nasr for Housing and Development



LOCATION

Cairo-Suez
Road

AREA

5.5 mn m²

FACILITIES

Sports Club,
Commercial Area
& Hotel

RAI

SUPPLY VOLUME

● Villas & Townhouses

● S Villa Area: 212 - 239 m²● Townhouse Area: 160 m²

DIAMOND RESORT

Developer: SV Developments


LOCATION
Ras Sidr


AREA
50 Acres


INVESTMENTS
EGP **1 bn+**

NEW PHASE

SUPPLY VOLUME

- Villas & Studio Units
- Studio Unit Area: Starting From **40 m²**
- Villa Area: **160 m²**

REVOLVE MALL

Developer: Eight Developments


LOCATION
New Cairo


AREA
15,000 m²


INVESTMENTS
EGP **2.5 bn+**

 **80%**
COMPLETION RATE

SUPPLY VOLUME

- Commercial, Administrative & Hotel Units
- No.of Commercial Units: **245**
- No.of Administrative Units: **146**
- No.of Hotel Units: **62**

HAVEN TOWER

Developer: EGICS Development


LOCATION
NAC


Sales Rate
50%

OWEST

Developer: Orascom Development


LOCATION
West Cairo



AREA
1,000 Acres


NO.OF DELIVERED UNITS
DURING 2023
1,000 +


ACHIEVED SALES IN 2022
EGP **5.7 bn**

 **11,000**
NO.OF HOUSING UNITS

 **444 Villas**
NO.OF EXECUTED UNITS

 NO.OF UNITS UNDERWAY
1,015 Apartments
236 Townhouses



ECONOMIC SNAPSHOT

04 | ECONOMIC SNAPSHOT

UPDATES 2023



INTEREST RATES



* MPC Meeting Was Held On Mar 30, 2023



MONEY SUPPLY (EGP BN)



DOMESTIC LIQUIDITY (EGP BN)



ANNUAL HEADLINE INFLATION

FEB-2023: 31.9

MAR-2023: 32.7

↑



NET INTERNATIONAL RESERVES (USD BN)

FEB-2023: 34.35

MAR-2023: 34.45

↑



PURCHASING MANAGERS' INDEX (PMI)

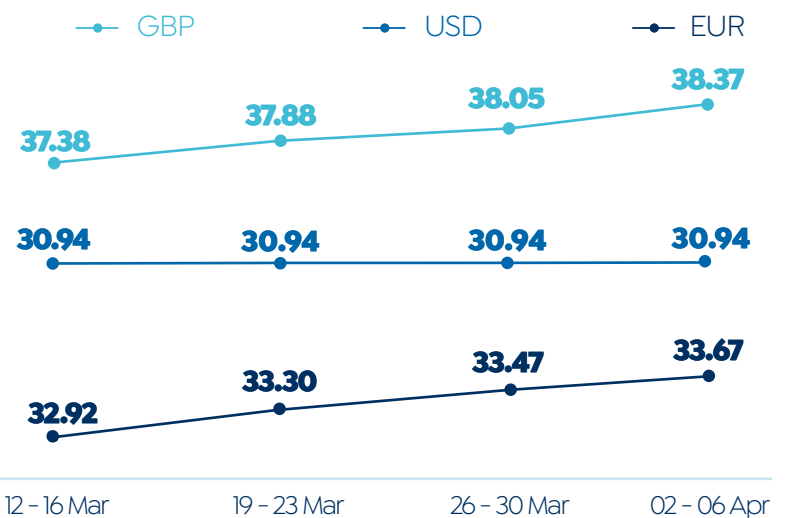
FEB-2023: 46.9

MAR-2023: 46.7

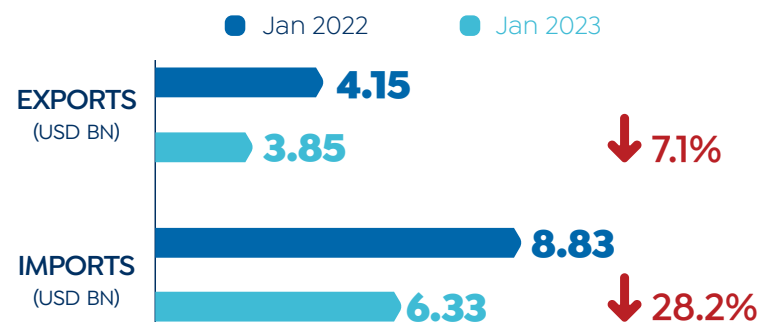
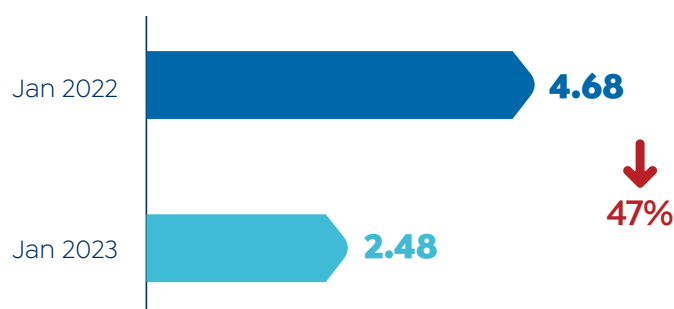
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EXCHANGE RATES



TRADE DEFICIT (USD BN)

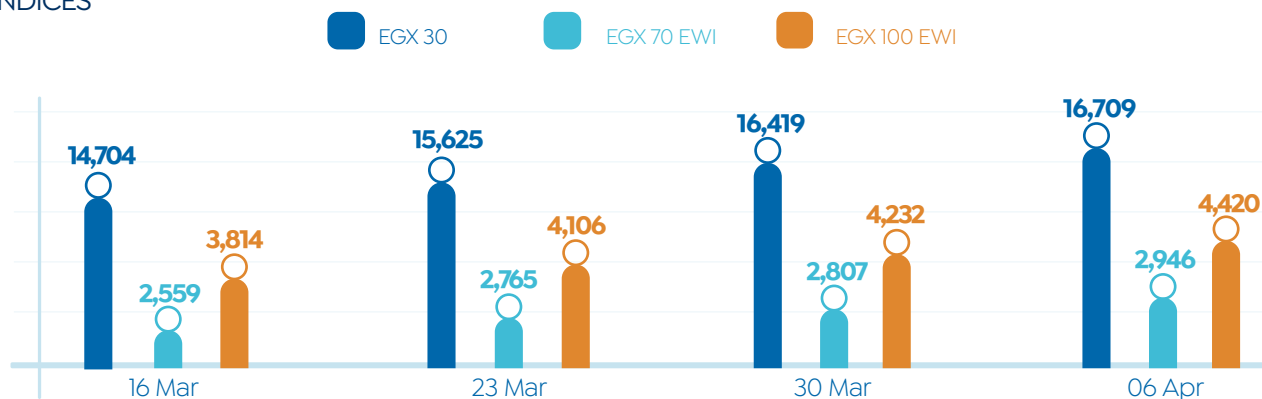


Source: IHS Markit, CAPMAS, CBE & FEDCOC

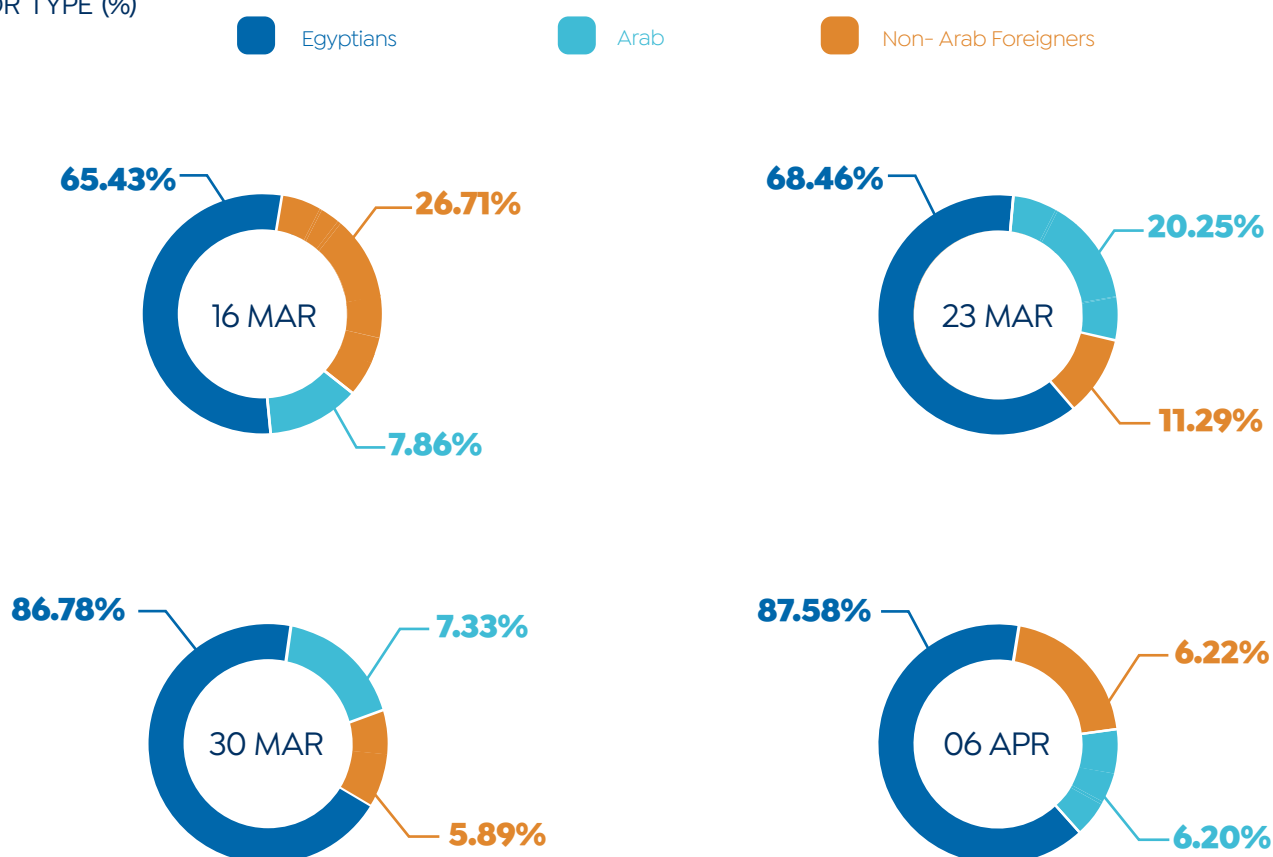


CAPITAL MARKET INDICATORS

MARKET INDICES

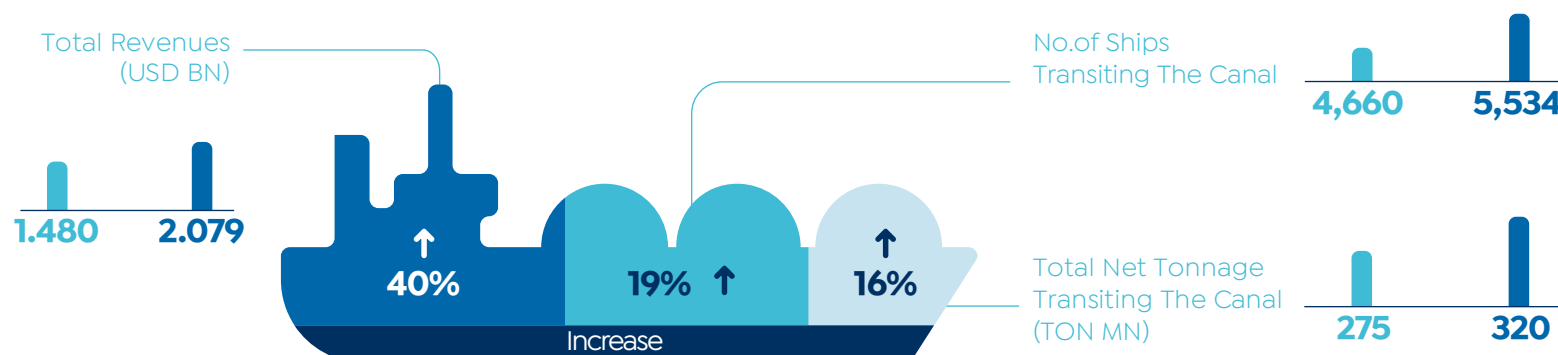


INVESTOR TYPE (%)



SUEZ CANAL

Jan-Mar 2022 (Light Blue) Jan-Mar 2023 (Dark Blue)

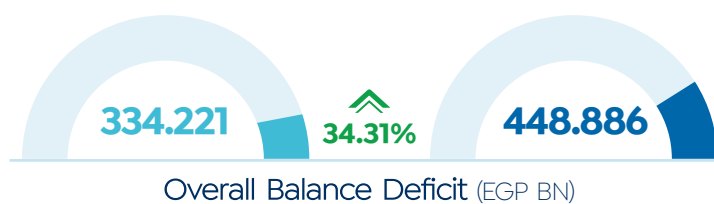


Source: EGX & Suez Canal Authority

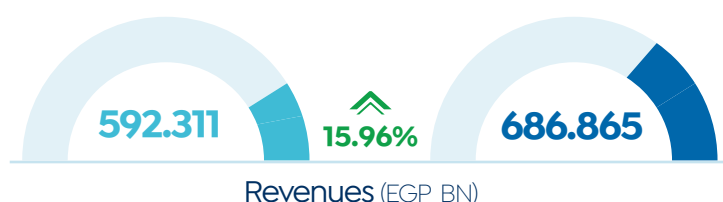
FISCAL SECTOR PERFORMANCE

July-Jan (FY 2021/22)

July-Jan (FY 2022/23)



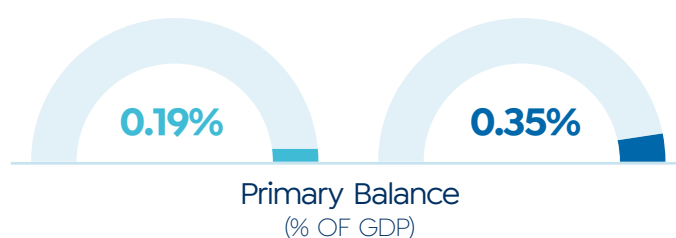
Overall Balance Deficit (EGP BN)



Revenues (EGP BN)

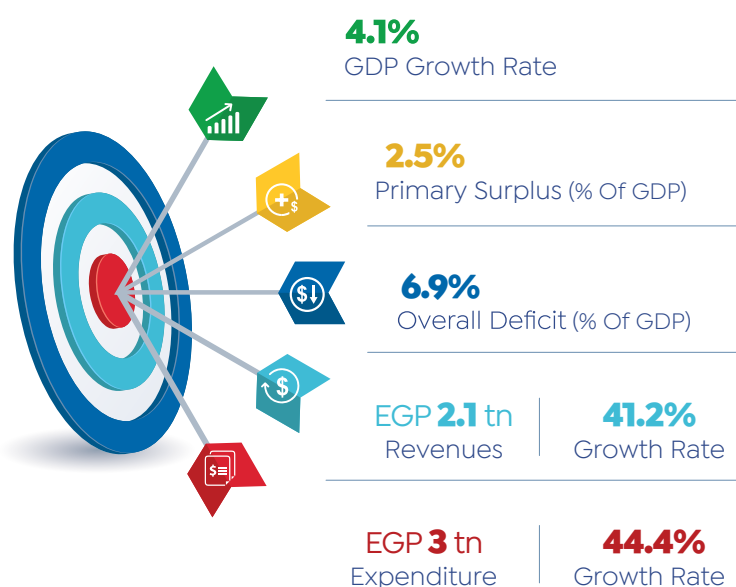


Expenditure (EGP BN)

Primary Balance
(% OF GDP)Overall Balance Deficit
(% OF GDP)

STATE'S GENERAL BUDGET FY (2023/24)

Targets



Financial Allocations

