

MARKET WATCH

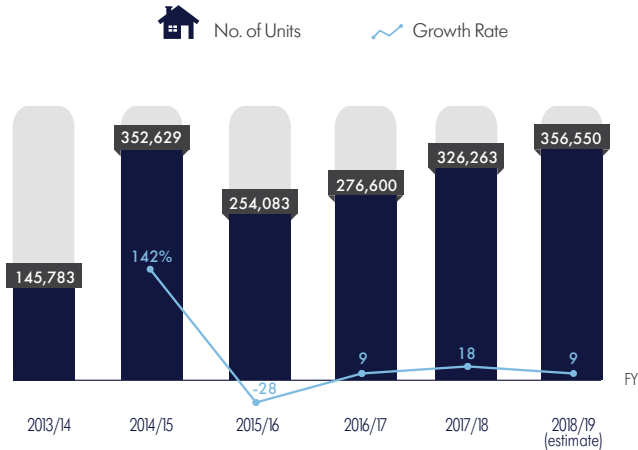
POWERED BY

INVESTIGATE
—RESEARCH & ANALYSIS—

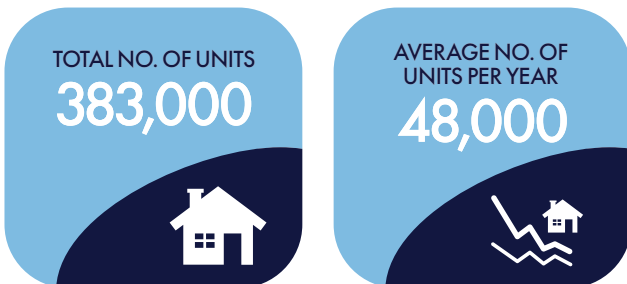
INSIGHTS ON EGYPT'S REAL ESTATE INDUSTRY



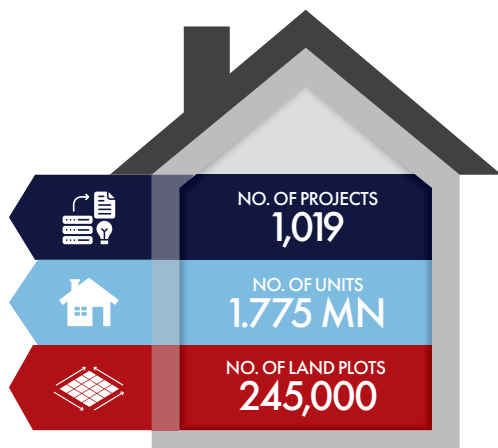
REAL ESTATE SUPPLY



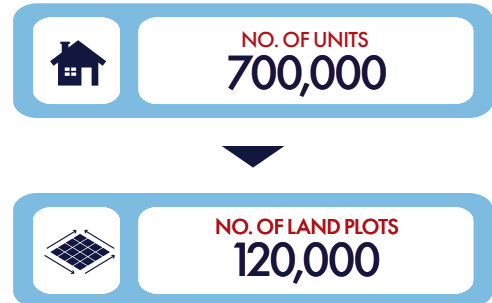
HOUSING UNITS IN 2005-2013



HOUSING PROJECTS IN 2014-2018



TARGETED UNITS (2019 - JUNE 2020)



PRICES OF CONSTRUCTION MATERIALS (NOVEMBER 2019) (EGP)

STEEL BARS (per acre) 10,100 (YOY -17.6%)	CRETAL STEEL (per acre) 10,500 (YOY -14.6%)	PORTLAND CEMENT (per acre) 800 (YOY -15.8%)	COARSE SAND (per sqm) 70 (YOY 7.7%)
SOLID CEMENT BRICKS (per 1,000 bricks) 1,100 (YOY 3.8%)		BRICK HOLLOW CONCRETE (40x20x12 cm) (per 1,000 bricks) 5,050 (YOY -2.9%)	



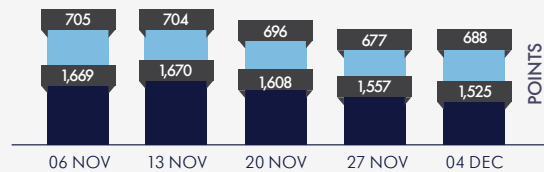
REAL ESTATE & CONSTRUCTION STOCK MARKETS INDEXES PERFORMANCE IN EGYPT (2019)



Real Estate

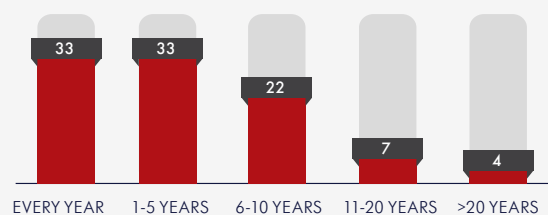


Construction & Materials



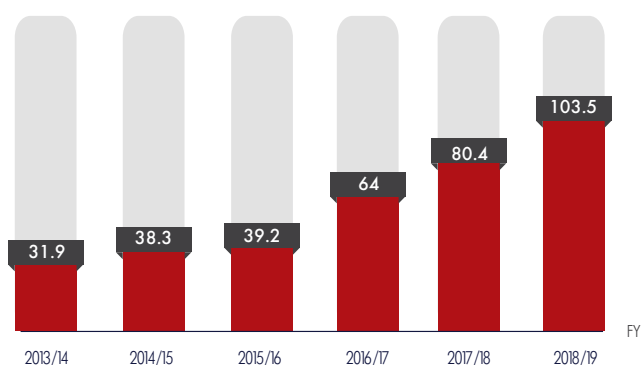
ONLINE MONTHLY SURVEY (%)

HOW OFTEN DO YOU LOOK FOR REAL ESTATE PROPERTY?

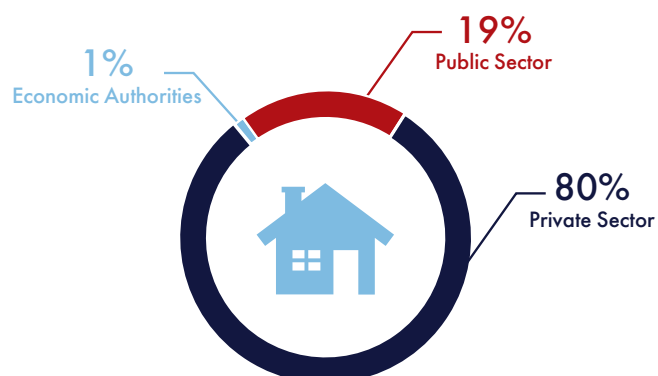




TOTAL REAL ESTATE INVESTMENTS (EGP BN)



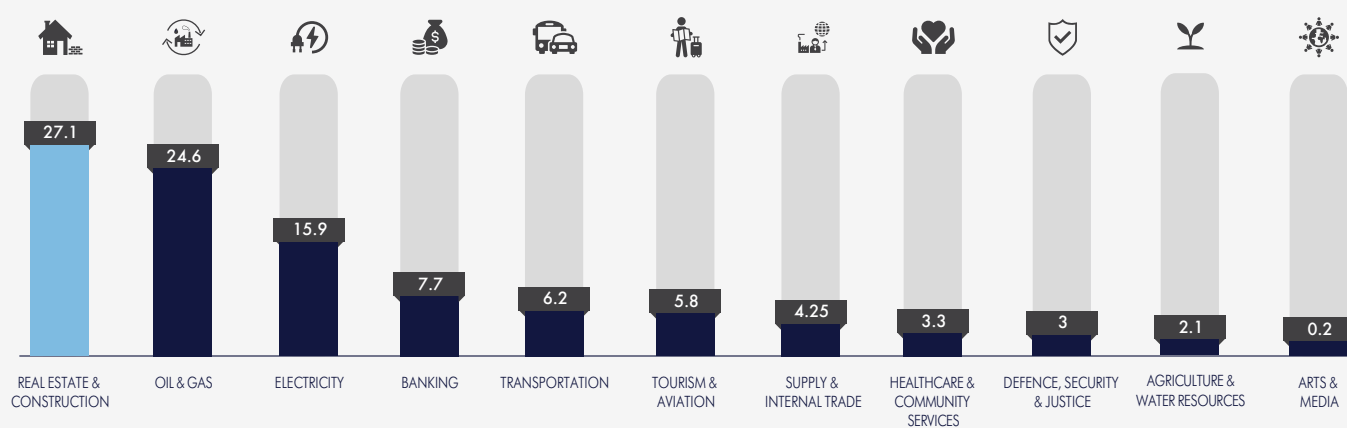
REAL ESTATE INVESTMENTS BY SECTOR IN FY 2018/19



REAL ESTATE & CONSTRUCTION PERFORMANCE (GDP GROWTH RATES)

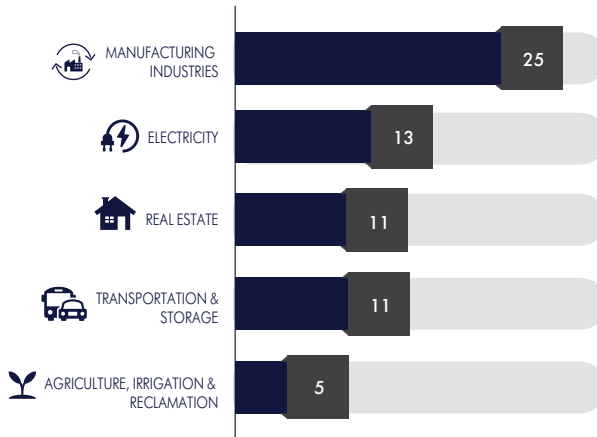


EMPLOYMENT SHARE IN REAL ESTATE MARKET IN 2018 (%)





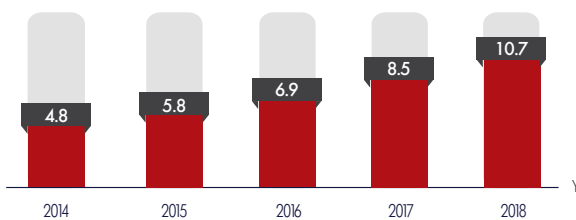
TOTAL INVESTMENTS BY INDUSTRY IN FY 2018/19 (%)



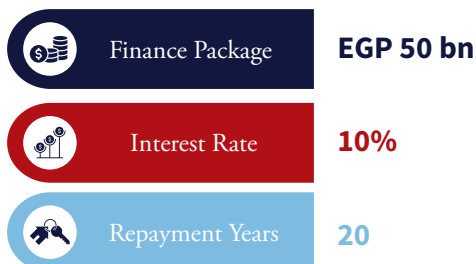
MORTGAGE FINANCE ACHIEVEMENTS (JUNE 2014 - PRESENT)



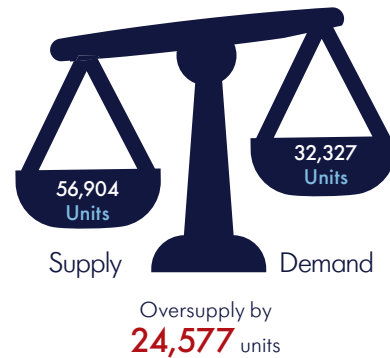
TOTAL VALUE OF MORTGAGES (EGP BN)



MORTGAGE FINANCE INITIATIVE FOR MIDDLE INCOME-PEOPLE IN DECEMBER 2019



DEMAND VS SUPPLY IN 2019 (PRIVATE SECTOR)



FROZEN/CLOSED UNITS BASED ON CENSUS 2017



NO. OF UNITS **12.5 mn**



OVERALL INDEX - NET PROFIT (EGP MN)*



*Calculated based on net profit of top ten EGX-listed real estate companies



OVERALL INDEX - REVENUES (EGP MN)*



*Calculated based on revenues of top ten EGX-listed real estate companies



REAL ESTATE INVESTMENTS (EGP BN)



ECONOMIC SNAPSHOT



EGYPT'S TOP TRADE PARTNERS IN FY 2018/19

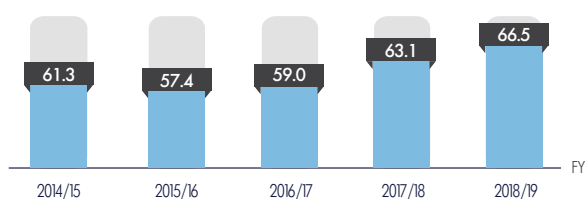


Value (USD bn)

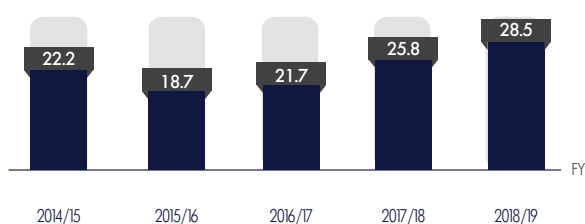
	China		United Kingdom
6.5	6.8%	4.2	4.5%
	United States		Turkey
6.2	6.6%	3.6	3.8%
	Saudi Arabia		Switzerland
6.0	6.3%	3.3	3.5%
	United Arab Emirates		India
5.8	6.1%	3.0	3.1%
	Russia		France
4.8	5%	2.7	2.9%
	Italy		Kuwait
4.5	4.7%	2.3	2.4%
	Germany		Spain
4.3	4.5%	2.0	2.1%



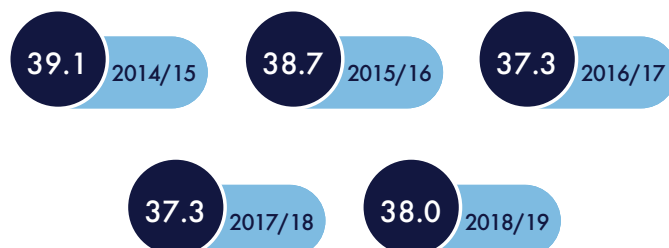
TOTAL IMPORTS (USD BN)



TOTAL EXPORTS (USD BN)



BALANCE OF PAYMENTS DEFICIT (USD BN)



NET FOREIGN RESERVES (USD BN)

OCTOBER 2019
45.24
(AROUND EGP 729.3 BN)

NOVEMBER 2019

45.35
(AROUND EGP 731.1 BN)



ANNUAL HEADLINE INFLATION

OCTOBER 2019
3.1%

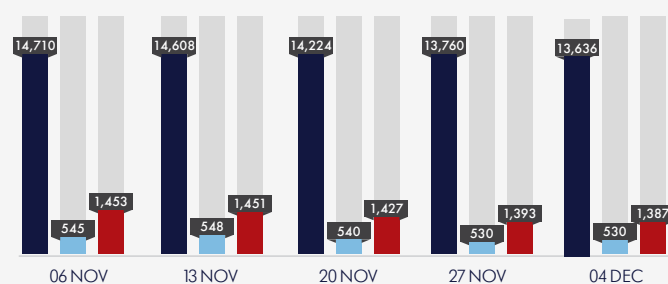
NOVEMBER 2019

3.6%



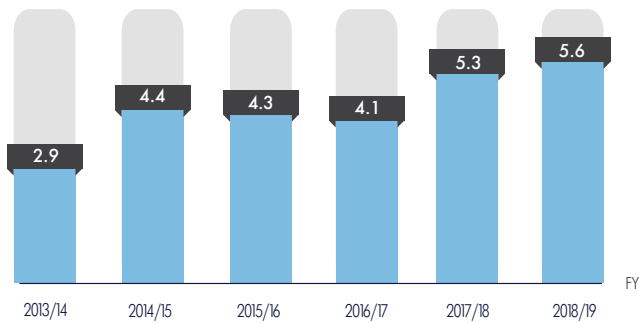
CAPITAL MARKET INDICATORS

EGX 30 EGX 70 EGX 100

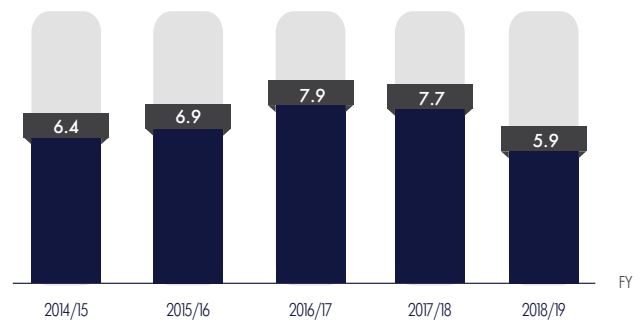




ECONOMIC GROWTH RATE (GDP) (%)



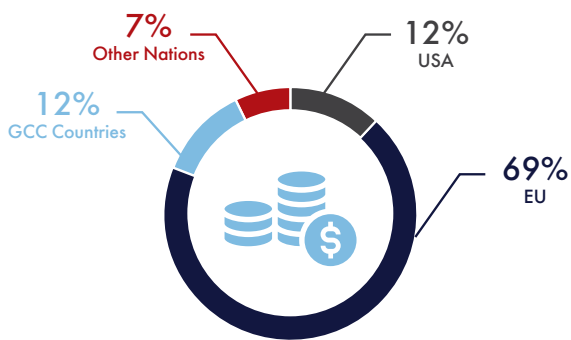
FDIS* IN EGYPT (USD BN)



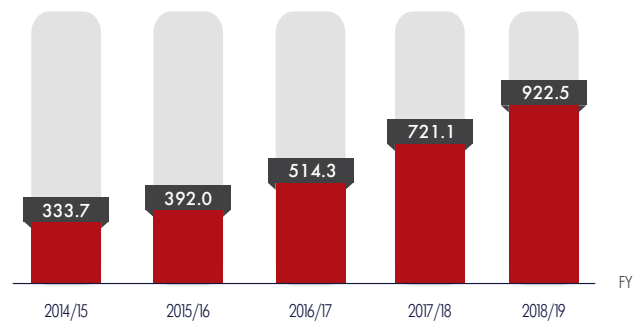
*FDIs: Foreign Direct Investments



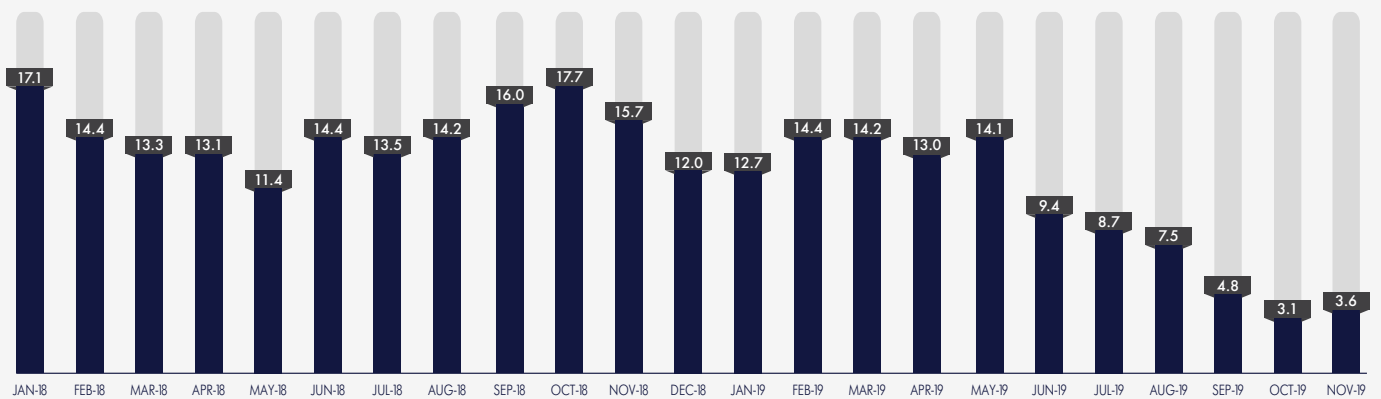
FDIS IN EGYPT BY COUNTRIES IN FY 2018/19



TOTAL INVESTMENTS (EGP BN)

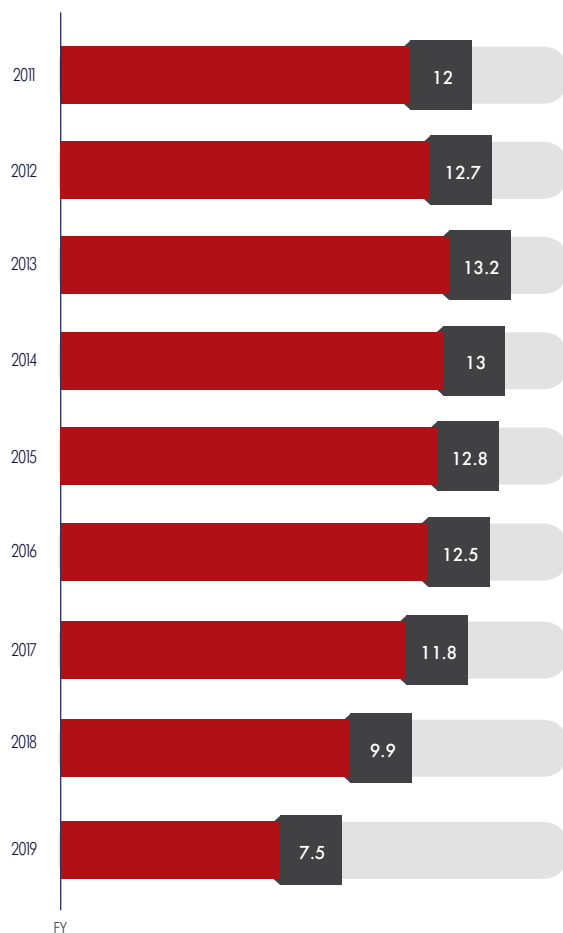


INFLATION RATE (%)





UNEMPLOYMENT RATES (%)



EGYPT'S EASE OF DOING BUSINESS RANKING (OUT OF 190 COUNTRIES)

Ease of Doing Business

2019 120 2020 114

Starting Business

2019 109 2020 90



EGYPT'S COMPETITIVENESS INDEX



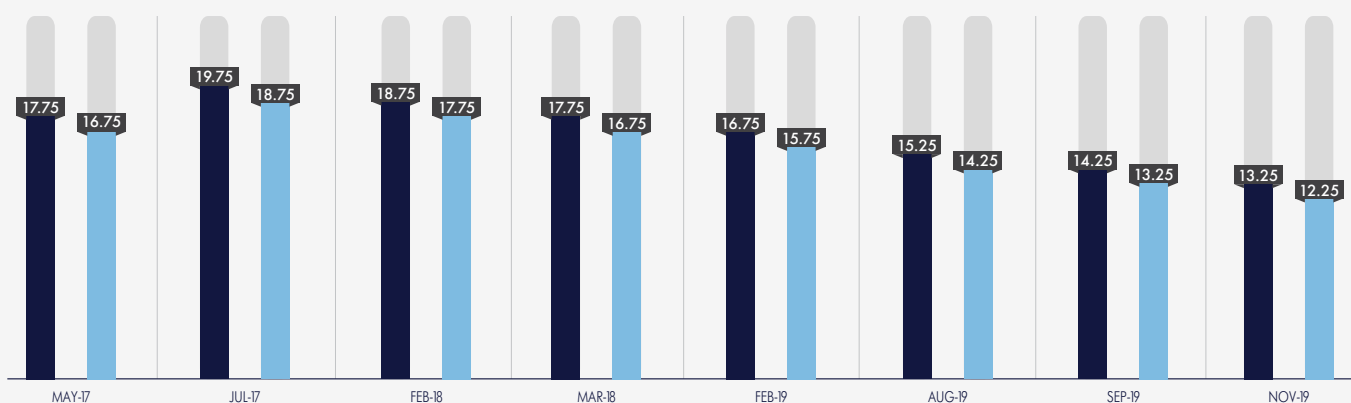
INTEREST RATES PERFORMANCE (%)



Lending Rates



Deposit Rates





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