

MARKET WATCH

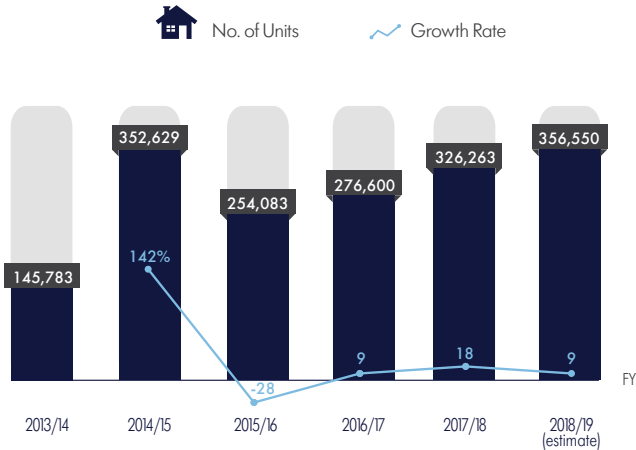
POWERED BY

INVESTIGATE
— RESEARCH & ANALYSIS —

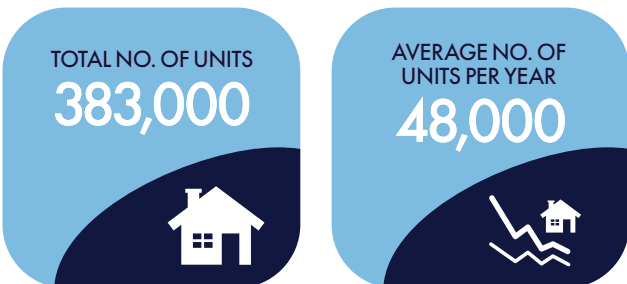
INSIGHTS ON EGYPT'S REAL ESTATE INDUSTRY



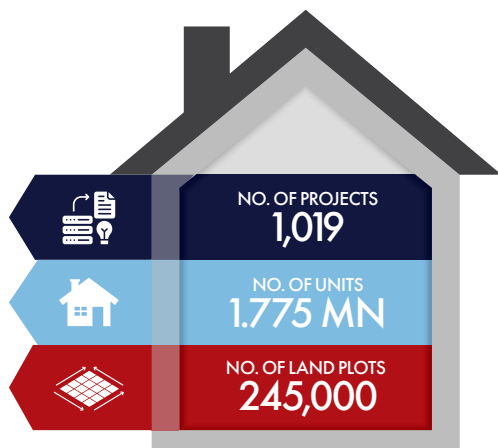
REAL ESTATE SUPPLY



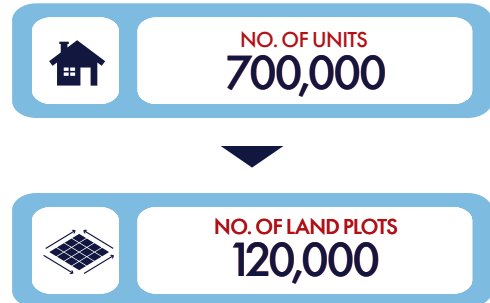
HOUSING UNITS IN 2005-2013



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)		BRICK HOLLOW CONCRETE (40x20x12 cm) (per 1,000 bricks)					
1,100 (YOY 3.8%)		5,050 (YOY -2.9%)					



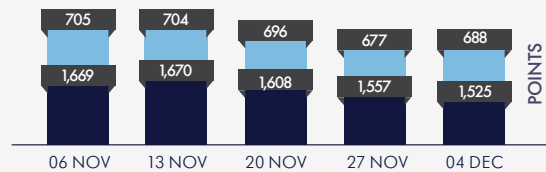
REAL ESTATE & CONSTRUCTION STOCK MARKETS INDEXES PERFORMANCE IN EGYPT (2019)



Real Estate

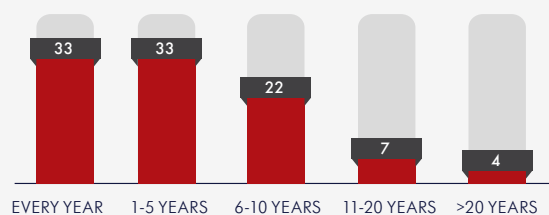


Construction & Materials



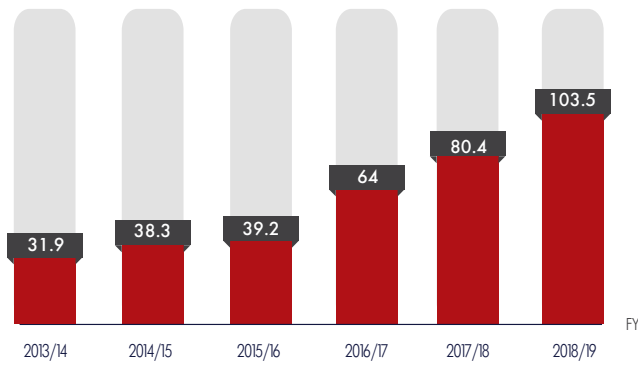
ONLINE MONTHLY SURVEY (%)

HOW OFTEN DO YOU LOOK FOR REAL ESTATE PROPERTY?

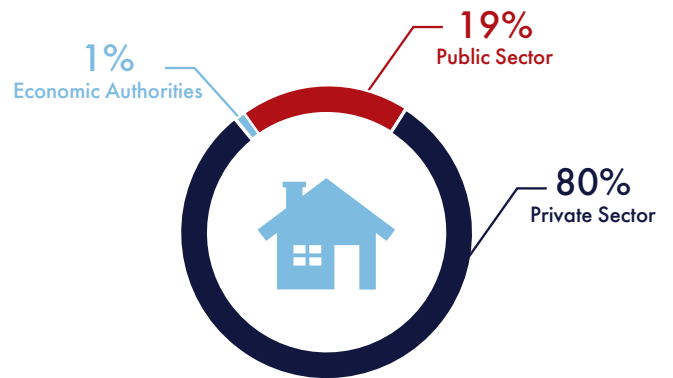




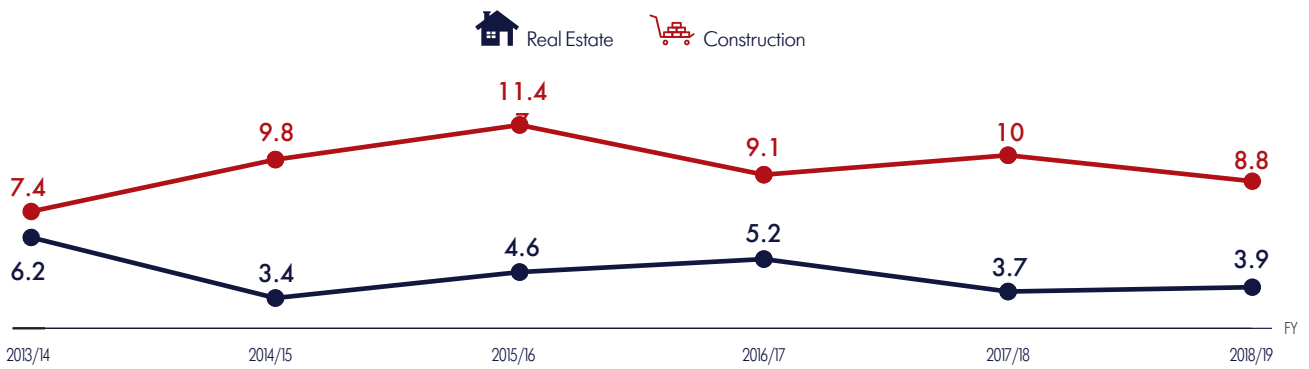
TOTAL REAL ESTATE INVESTMENTS (EGP BN)



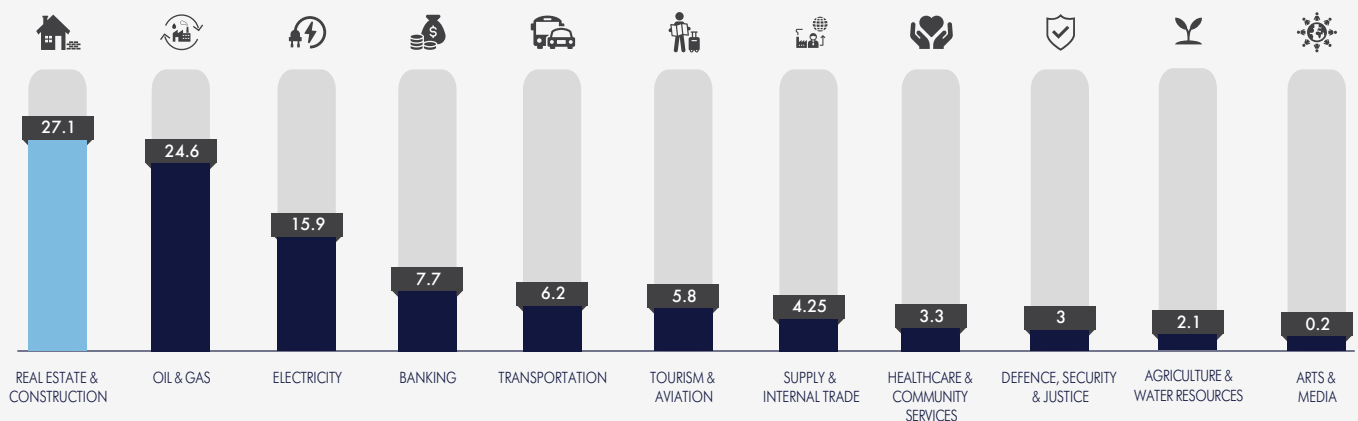
REAL ESTATE INVESTMENTS BY SECTOR IN FY 2018/19



REAL ESTATE & CONSTRUCTION PERFORMANCE (GDP GROWTH RATES)

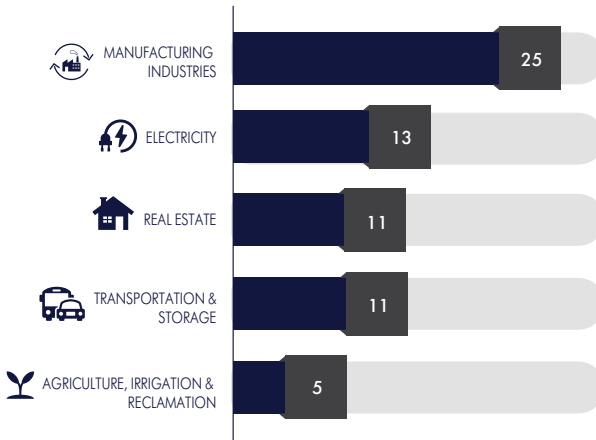


EMPLOYMENT SHARE IN REAL ESTATE MARKET IN 2018 (%)

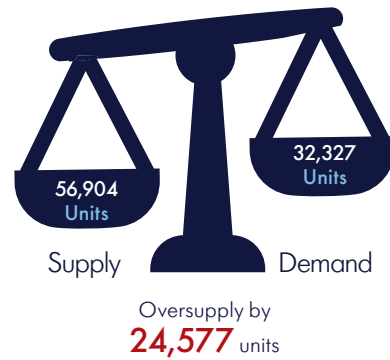


Sources: Central Bank of Egypt (CBE) and CAPMAS

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



DEMAND VS SUPPLY IN 2019 (PRIVATE SECTOR)



FROZEN/CLOSED UNITS BASED ON CENSUS 2017



MORTGAGE FINANCE ACHIEVEMENTS (JUNE 2014 - PRESENT)

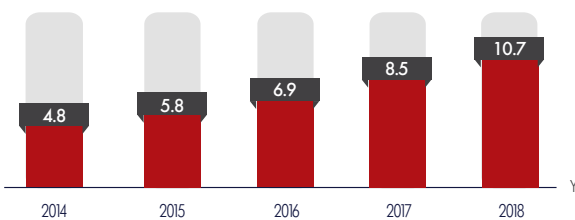


OVERALL INDEX - NET PROFIT (EGP MN)*



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

TOTAL VALUE OF MORTGAGES (EGP BN)

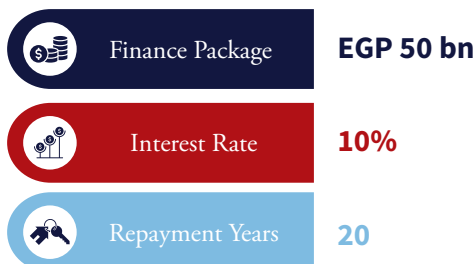


OVERALL INDEX - REVENUES (EGP MN)*

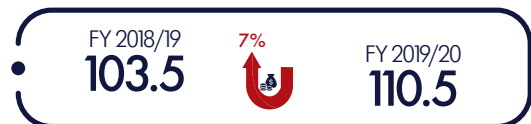


*Calculated based on revenues of top ten EGX-listed real estate companies

MORTGAGE FINANCE INITIATIVE FOR MIDDLE INCOME-PEOPLE IN DECEMBER 2019












REAL ESTATE INVESTMENTS (EGP BN)



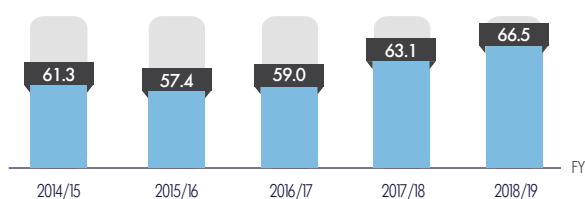
ECONOMIC SNAPSHOT

EGYPT'S TOP TRADE PARTNERS IN FY 2018/19

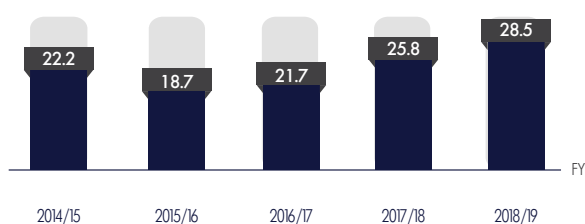
Value (USD bn)

 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%

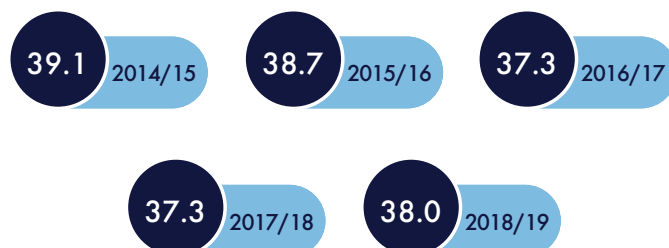
TOTAL IMPORTS (USD BN)



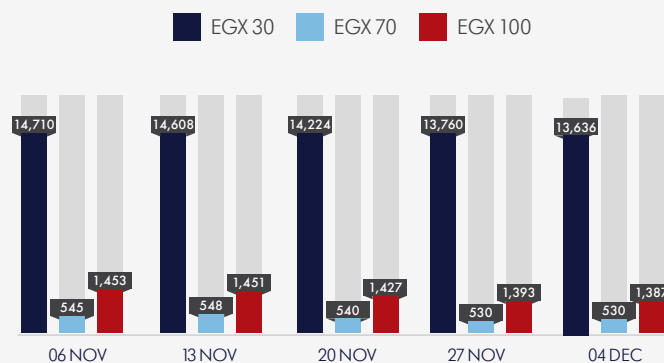
TOTAL EXPORTS (USD BN)



BALANCE OF PAYMENTS DEFICIT (USD BN)

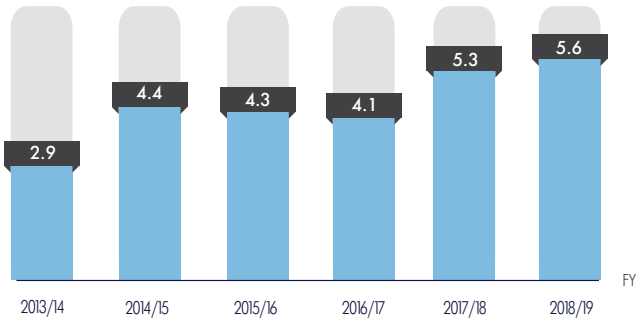


CAPITAL MARKET INDICATORS

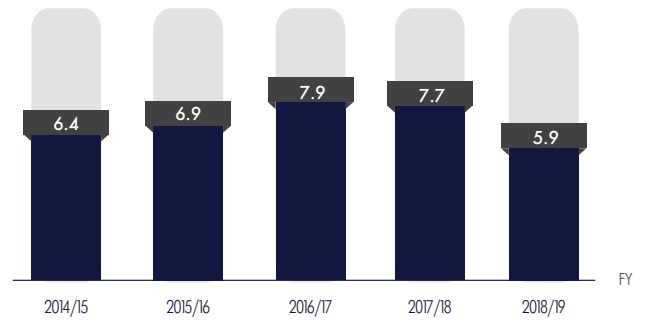




ECONOMIC GROWTH RATE (GDP) (%)



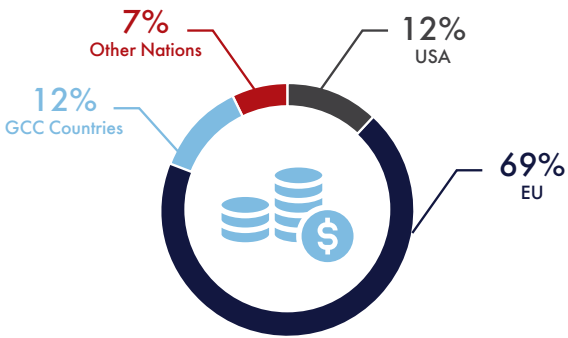
FDIS* IN EGYPT (USD BN)



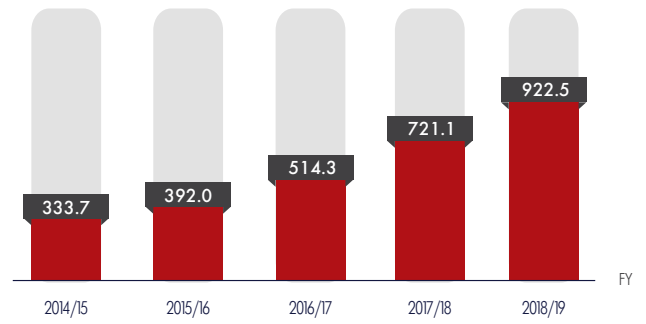
*FDIs: Foreign Direct Investments



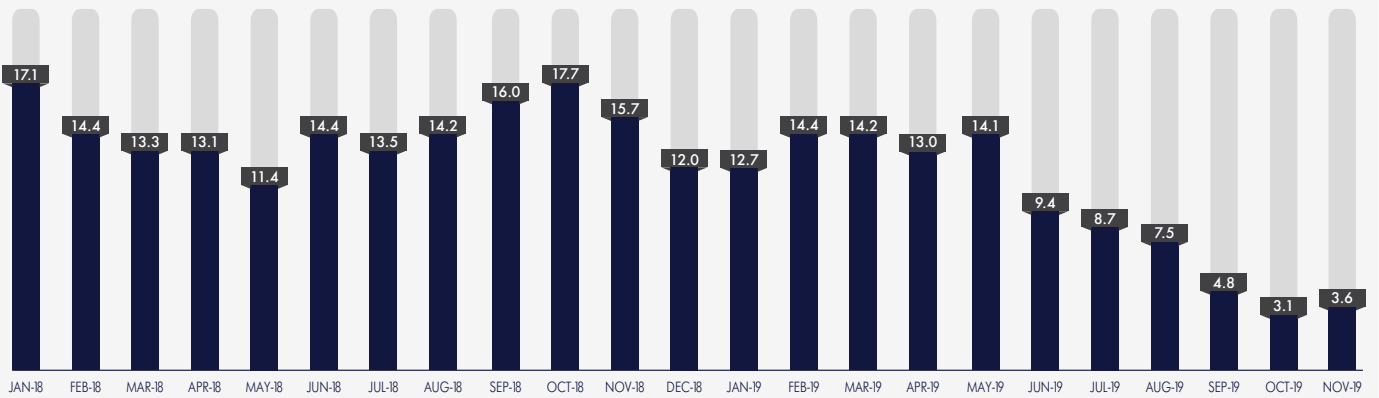
FDIS IN EGYPT BY COUNTRIES IN FY 2018/19



TOTAL INVESTMENTS (EGP BN)



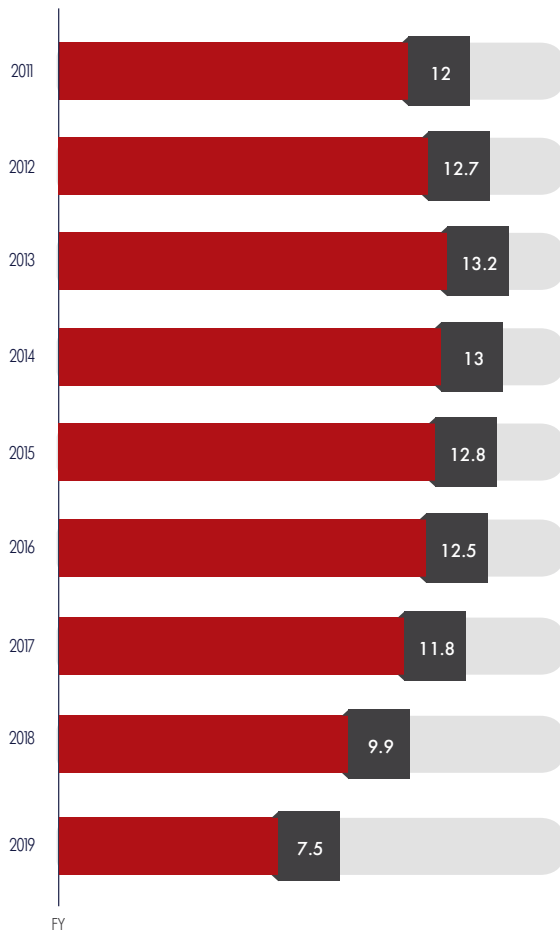
INFLATION RATE (%)



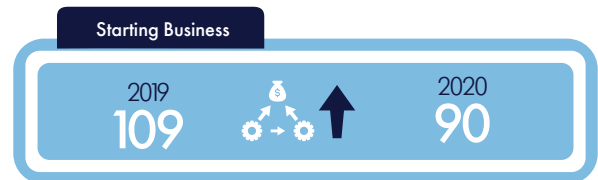
Source: CBE



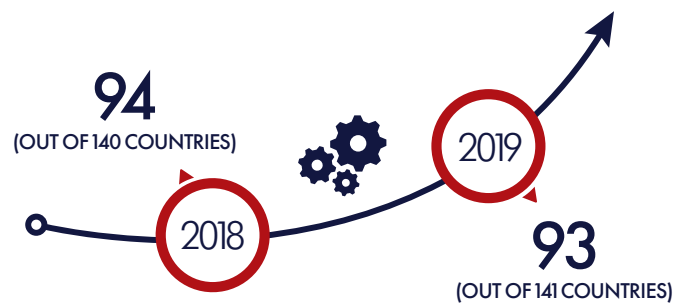
UNEMPLOYMENT RATES (%)



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



EGYPT'S COMPETITIVENESS INDEX



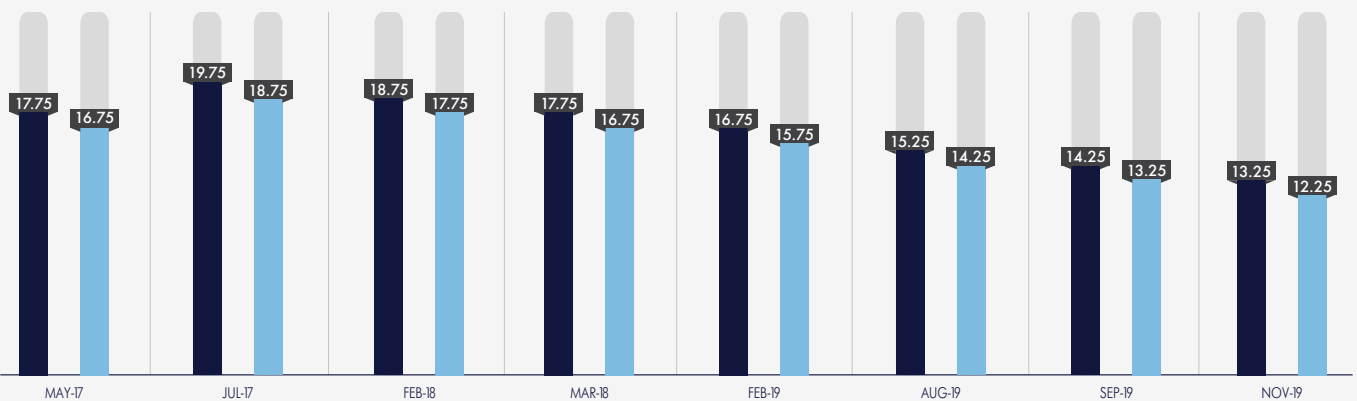
INTEREST RATES PERFORMANCE (%)



Lending Rates



Deposit Rates



Sources: CAPMAS, CBE, World Bank, and World Economic Forum



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