

BIST TRENDS REPORTS

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Executive Summary

Dear Readers,

We are delighted to present you the Stock Market Trends Report for 2Q22.

By the end of the second quarter of 2022, the number of companies traded on BIST ALL has increased to 429 from 403.

As the upward trend seen in 4Q21 continued in the first six months of the year, the market capitalization of BIST ALL increased by 88% in TL terms as of the end of June 2022 compared to the same period of 2021, and by 30% compared to the end of 2021.

During this period, all indices gained value on TL basis, both on an annual and quarterly basis similar to last quarter. The highest annual value increases were in BIST 50 (113%), BIST 100 (105%) and BIST Holding and Investments (105%) indices, while the highest quarterly value increases were in BIST 50 (17%), BIST Services (13%), BIST Holding and Investments (12%), BIST Financials (11%) and BIST ALL (10%) indices.

In the second quarter of 2022, the turnover volume of BIST ALL increased by 132% in TL terms and 24% in USD terms compared to the same period of the previous year.

Foreign investors, who have been on the seller side of Borsa Istanbul since 2018, continued their sales in the second quarter, a trend also seen in the first quarter of 2022, and realized net share sales of approximately 1.9 billion USD. Thus, as the total foreign investor share sales in the first six months of the year reached USD 2.9 billion, the share of foreign investors in Borsa Istanbul decreased by 10 points on an annual basis and by 5 points on a quarterly basis, to 34%. Foreign outflows were experienced in all indices in the second quarter.

Due to the increase in inflation and the negative interest rate environment, the number of domestic investors in Borsa Istanbul, who directed their savings to stocks, continued to increase in the second quarter as well, increasing by 153 thousand compared to the end of 2021 and reached approximately 2.4 million by the end of June 2022.

As of the end of June 2022, the first three countries with the highest portfolio value in Borsa Istanbul were the USA, Qatar and the United Kingdom. The USA, which surpassed Qatar in the second quarter of 2021 and rose to the first place, maintained its first place in the first six months of this year and increased its share in the total portfolio by 6 points to 30% compared to the same period of the previous year.

The volume of Local currency denominated private sector debt instruments issued in Turkey increased by 9% compared to the end of second quarter of 2021.

All the best until the next reporting period.

Aslı Selçuk

TUYID Chairperson