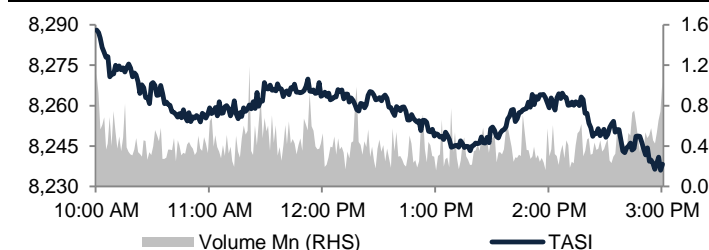


Saudi Stock Exchange

Index	Closing	High	Low	Daily Change %	YTD %
TASI	8,254	8,289	8,232	(0.4)	14.2
NOMU	2,807	2,807	2,789	0.7	(10.6)

TASI movement during session



Index	Close	Daily Change %	% YTD	PE (TTM)
Energy	5,044	(0.9)	17.9	17.2
Materials	5,950	(0.3)	17.7	21.9
Capital Goods	3,836	(1.1)	(11.6)	-28.2
Commercial Service	4,553	0.1	8.2	19.5
Transportation	3,824	(0.6)	(4.7)	18.1
Consumer Durables	3,897	0.5	(5.9)	-19.0
Consumer Services	3,435	0.5	(6.8)	14.9
Media	12,840	(0.6)	66.0	529.1
Retailing	6,111	0.7	8.5	20.0
Food & Staples	6,199	(0.7)	10.5	18.4
Food & Beverages	4,476	0.3	(8.6)	27.2
Healthcare	4,516	(0.3)	1.6	20.5
Pharma & Bio Tech	4,182	(1.7)	5.3	25.1
Banks	7,205	(0.8)	31.0	13.6
Diversified Financials	3,708	(0.4)	(8.0)	-35.0
Insurance	3,956	(0.0)	(16.2)	32.1
Telecom	5,222	0.1	22.8	31.4
Utilities	4,098	(0.2)	(10.2)	72.8
REITs	3,869	(0.3)	(16.5)	57.0
Real Estate	3,673	(0.1)	(21.8)	29.8

Average Index Value

Average 5 days	Average 10 days	Average 20 days	Average value traded for the month (bn)
8,291	8,354	8,376	3.73

Market Statistics

	Value Traded (SAR bn)	Volumes (mn shares)	No. of Trades ('000 shares)
Current Week	-	-	-
Previous week	18.4	686.4	470.8

Top Gainers

Company	Price	Change%
AXA Cooperative	22.58	6.4
Trade Union	23.68	5.8
Amana Insurance	20.20	5.8
AlRajhi Takaful	57.40	5.3
U C A	13.34	2.9

Top Losers

Company	Price	Change%
Arabian Shield	22.20	-10.0
WAFRAH	14.30	-5.9
Bawan	15.48	-4.9
Nama Chemicals	26.25	-3.5
SSP	18.40	-3.2

Top Weighted Companies

Company	Price	Change%
Al Rajhi	87.20	-0.8
SABIC	128.60	-0.2
NCB	46.55	0.4
SAMBA	31.75	-0.8
STC	86.30	0.3

Major Economic News

- According to UBS Global Wealth, international investors' interest in KSA and the wider Middle East region is rising, and foreign capital inflows to the Kingdom are expected to rise "significantly" after major index compilers decided to upgrade the country to the emerging market status. (Source: Argaam)
- According to KSA's central bank, bank loans issued to KSA's public and private sectors touched SAR 1.472tn by the end of June 2018 as against SAR 1.465tn in the year-earlier period. (Source: Argaam)
- According to Bloomberg, OPEC's crude oil production increased in July, as KSA pumped near-record volumes. KSA's oil production rose 230,000 barrels per day (bpd) last month to 10.65 million barrels per day (mpd), marginally lower than an all-time peak reached in 2016. (Source: Argaam)
- According to Moody's Rating Agency, KSA's first sukuk issuance under the primary dealers program, which amounted around SAR 3.5bn, is encouraging for the development of the Kingdom's Islamic debt capital markets. It further added that the issuance expands the investor base for government sukuk securities in the primary market and backs liquidity in the secondary market. (Source: Argaam)

Major Corporate News

- L'Azurde for Jewelry Co.'s net profit fell 51.2% YoY to SAR 13.9mn for 1H2018. The fall in profit is ascribed to higher marketing costs, increased rental cost of retail expansion in Egypt, and additional staff-related costs in KSA. (Source: Argaam)
- Dur Hospitality inked a SAR 300mn Tawarruq deal with Arab National Bank (ANB). The deal is a step toward the firm's expansion strategy. The hospitality firm will utilize the facility to secure the finance of a number of the company's projects previously planned in Jeddah, Yanbu, and Ehsa. (Source: Argaam)

Market Analysis

- The Saudi Stock Exchange decreased 0.4% to 8,253.5 on Thursday. The value traded stood at SAR 3.8bn (up 5.5% over previous day), while the advance-decline ratio stood at 56/117. The parallel market index increased 0.7% to 2,807.0 points. The value traded stood at SAR 0.7mn (up 23.7% over previous day). Most sectors in the main market ended in the red. Retailing and Consumer Durables (up 0.7% and 0.5% respectively) advanced the most; Pharma & BioTech and Capital Goods (down 1.7% and 1.1%, respectively) led the laggards.

Regional Markets

Market	Close	Daily Change %	MTD %	YTD %
Dubai (DFM)	2,974	-0.2	0.6	-11.8
Abu Dhabi (ADX)	4,811	-0.7	-1.0	9.4
Kuwait (KSE)	4,946	0.1	0.3	**NA
Qatar (QE)	9,981	0.0	1.6	17.1
Oman (MSM)	4,327	-0.3	-0.2	-15.2
Bahrain (BSE)	1,349	-0.3	-0.7	1.3
Egypt (EGX30)	15,806	0.9	1.5	5.2

International Markets

Index	Close	Daily Change %	MTD %	YTD %
Dow Jones	25,463	0.5	0.2	3.0
Nasdaq	7,395	0.3	2.3	15.6
S&P 500	2,840	0.5	0.9	6.2
FTSE 100	7,659	1.1	-1.2	-0.4
Germany DAX 30	12,616	0.6	-1.5	-2.3
France CAC 40	5,479	0.3	-0.6	3.1
Japan Nikkei 225	22,525	0.1	1.0	-1.1
Hong Kong Hang Seng	27,676	-0.1	-3.2	-7.5
China Shanghai Composite	2,740	-1.0	-4.7	-17.1
Australia ASX 200	6,235	-0.1	-0.7	2.8
India Sensex	37,556	1.1	-0.1	10.3

Commodity Markets

Commodity	Price	Daily Change %	MTD %	YTD %
Arab Light Crude (\$/bbl)	73.8	0.2	-4.9	13.3
Brent Crude (\$/bbl)	73.2	-0.3	-1.4	9.5
Texas crude (\$/bbl)	68.5	-0.7	-2.0	13.3
Natural Gas (\$/mmbtu)	2.85	1.3	2.6	-3.4
Gold (\$/oz)	1,213	0.5	-0.8	-6.9
Silver (\$/oz)	15.4	0.5	-0.9	-9.2
Steel (\$/ton)	894	-0.1	-1.8	35.0
Iron Ore (CNY/MT)	503	0.0	15.4	3.0
Wheat (\$/bu)	556	-0.8	0.5	30.3
Corn (\$/bu)	370	0.8	-0.7	5.4
Sugar (\$/lb)	10.9	2.5	2.8	-28.4
SMP* (EUR/MT)	1,563	2.5	6.3	12.1

*SMP: Skimmed Milk Powder

Interbank Rates

Region	Rate*	Daily Change (bps)	MTD (bps)	YTD (bps)
USD LIBOR	2.341	0.0	-0.8	64.6
Saudi Arabia (SAIBOR)	2.608	-0.1	-0.1	71.1
UAE (EIBOR)	2.562	1.2	-5.8	76.7
Kuwait (KIBOR)	2.063	0.0	0.0	18.8
Qatar (QIBOR)	2.648	0.3	0.5	0.0
Bahrain (BHIBOR)	3.500	0.0	0.0	77.5

* Three-month Interbank rate **NA: Not Available

Data Sources: Tadawul, Bloomberg, Reuters

Updated as of August 05, 2018

Regional and International Markets

- Among other regional markets, Dubai and Abu Dhabi decreased 0.2% and 0.7%, respectively. Kuwait and Egypt increased 0.1% and 0.9%, respectively; while Oman and Bahrain decreased 0.3% each. Meanwhile, Qatar remained flat.
- According to Baker Hughes, North America's rig count decreased to 1,267 from 1,271 in the week ended August 03. Rig count increased to 1,044 from 1,048 in the US and rose to 16 from 15 in the Gulf of Mexico. Rig count in Canada remains the same at 223. (Source: Econoday)
- US Unemployment level decreased to 3.9% (consensus: 3.9%) in July as compared to 4.0% in prior month. Conversely, employers are not having to pay more to attract workers as average hourly earnings remains the same at 2.7%. Moreover, labour participation rate edged up by 0.1% to 62.9% in July. However, average working hours in a week remained unchanged at 34.5 hours. (Source: Econoday)
- Oil prices fell 0.3% on Friday as bullish and bearish trends balanced after July's sharp decline.
- Gold prices increased 0.5% on Friday, as the US dollar felt the pressure due to the data showing that the U.S. economy created fewer jobs than expected in July.

Forex / Currency

Currency	Close	Daily Change %	MTD %	YTD %
Dollar Index	95.1	0.0	0.7	3.3
Euro	1.16	-0.1	-1.1	-3.6
Japanese Yen	111.3	-0.4	-0.5	-1.3
Sterling Pound	1.30	-0.1	-0.9	-3.8
Chinese Yuan	6.83	-0.1	0.4	5.0
Indian Rupee	68.5	-0.1	0.1	7.4
UAE Dirham	3.67	0.0	0.0	0.0
Qatari Rial	3.64	0.0	0.0	0.0
Kuwaiti Dinar	0.30	0.0	0.0	0.4
Omani Rial	0.38	0.0	0.0	0.0
Bahraini Dinar	0.38	0.1	0.0	0.2
Egyptian Pound	17.84	0.0	0.1	0.6

Corporate Calendar

Date	Company	Event
06 th Aug	SGS	Cash Dividend Distribution
02 nd Aug	AlJazira REIT	Cash Dividend Distribution
07 th Aug	Kingdom	OGM
07 th Aug	Mulkia - Gulf Real Estate	Cash Dividend Distribution
08 th Aug	SAFCO	Cash Dividend Distribution
09 th Aug	Alujain	OGM

*EGM: Extra Ordinary Meeting

*OGM: Ordinary General Meeting

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