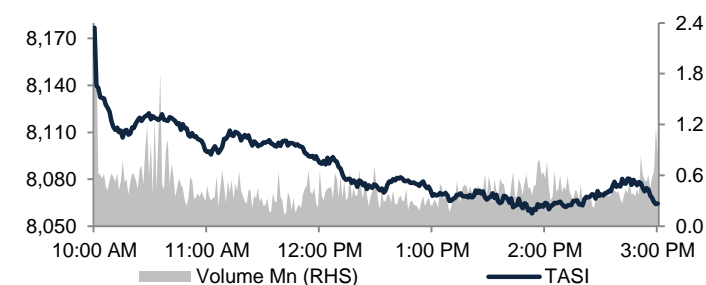


Saudi Stock Exchange

Index	Closing	High	Low	Daily Change %	YTD %
TASI	8,065	8,141	8,057	(1.4)	11.6
NOMU	2,807	2,808	2,796	0.1	(10.6)

TASI movement during session



Index	Close	Daily Change %	% YTD	PE (TTM)
Energy	4,840	(2.4)	13.1	16.5
Materials	5,858	(0.7)	15.9	21.6
Capital Goods	3,793	(1.7)	(12.6)	-27.9
Commercial Service	4,536	(1.1)	7.9	19.5
Transportation	3,746	(1.0)	(6.6)	17.8
Consumer Durables	3,773	(1.2)	(8.9)	-18.4
Consumer Services	3,274	(0.7)	(11.1)	14.2
Media	11,956	(3.3)	54.5	492.6
Retailing	6,272	(2.0)	11.3	20.6
Food & Staples	6,181	(1.3)	10.2	18.3
Food & Beverages	4,399	(1.7)	(10.2)	26.7
Healthcare	4,236	(2.6)	(4.7)	19.2
Pharma & Bio Tech	4,195	(0.5)	5.6	25.2
Banks	7,018	(1.4)	27.6	13.2
Diversified Financials	3,669	(0.7)	(9.0)	-34.6
Insurance	3,938	(2.0)	(16.6)	31.9
Telecom	5,134	(1.7)	20.7	30.9
Utilities	3,841	(1.4)	(15.8)	68.3
REITs	3,751	(0.7)	(19.0)	55.3
Real Estate	3,522	(2.3)	(25.0)	28.6

Average Index Value

Average 5 days	Average 10 days	Average 20 days	Average value traded for the month (bn)
8,185	8,231	8,328	4.05

Market Statistics

	Value Traded (SAR bn)	Volumes (mn shares)	No. of Trades ('000 shares)
Current Week	3.3	133.7	96.0
Previous week	21.7	760.0	496.5

Top Gainers

Company	Price	Change%
SACO	81.50	4.4
SCC	7.58	3.3
ALYAMAMAH	16.98	2.2
Takween	11.60	1.8
SSP	17.60	1.7

Top Losers

Company	Price	Change%
Saudi German Hosptl	43.75	-10.0
SPM	7.13	-7.3
APC	10.68	-6.8
MESC	7.50	-6.0
Buruj	26.60	-6.0

Top Weighted Companies

Company	Price	Change%
Al Rajhi	86.20	-1.3
SABIC	126.20	-0.5
NCB	42.80	-3.2
SAMBA	31.40	-0.9
STC	83.70	-1.8

Major Economic News

- KSA's General Organization for Social Insurance (GOSI) reported 9.1mn private sector employees were registered in the social insurance scheme at the end of 2Q2018, reflecting decline of 4.0% QoQ. Insured citizens, which comprise 19.0% of the total private sector subscribers, fell by 28,400 clients to 1.7mn in 2Q2018, compared with that in 1Q2018. (Source: Argaam)
- The Saudi Arabian Monetary Authority (SAMA) approved Saudi Enaya Cooperative Insurance Co.'s request to appoint a financial advisor for submitting a final report related to fixing irregularities. Earlier, the central bank had instructed the insurer to fix the irregularities, related to subdued performances in internal auditing as well as other compliance issues. (Source: Argaam)

Major Corporate News

- Sahara Petrochemical Co.'s board suggested a cash dividend of 5.0%, to be issued at SAR 0.5 per share, for 1H2018. The total dividend would amount to SAR 219.4mn, and the record date would be August 16, 2018. (Source: Argaam)
- Alujain Corp reported a rise in net profit by 205.8% YoY to SAR 126.5mn in 1H2018, as profit share from associate NATPET rose SAR 88.9mn. The net profits for the Company rose by more than 412.3% YoY to SAR 64.0mn in 2Q-18, due to scheduled shutdown of NATPET petrochemical plant for the same quarter last year. (Source: Argaam)
- According to data from Yamama Cement Company, the total sales of listed Saudi cement companies dropped to 3.39mn tons in July 2018 from 3.49mn tons in July 2017. The company added that 12 companies witnessed a fall in cement sales in July 2018 and five an increase in the top line. (Source: Argaam)

Market Analysis

- The Saudi Stock Exchange decreased 1.4% to 8,064.9 on Sunday. The value traded stood at SAR 3.3bn (down 24.4% over previous day), while the advance-decline ratio stood at 17/157. The parallel market index increased 0.1% to 2,807.1 points. The value traded stood at SAR 1.4mn (up 42.7% over previous day). All sectors in the main market ended in the red. Pharma & Biotech and Diversified Financials (down 0.5% and 0.7% respectively) lagged the least; Media and Healthcare (down 3.3% and 2.6%, respectively) led the laggards.

Regional Markets

Market	Close	Daily Change %	MTD %	YTD %
Dubai (DFM)	2,889	-1.0	-2.2	-14.3
Abu Dhabi (ADX)	4,845	-0.6	-0.3	10.1
Kuwait (KSE)	4,953	-0.2	0.4	**NA
Qatar (QE)	9,635	-2.5	-1.9	13.0
Oman (MSM)	4,406	-0.6	1.6	-13.6
Bahrain (BSE)	1,348	-0.1	-0.7	1.2
Egypt (EGX30)	15,738	-1.2	1.0	4.8

International Markets

Index	Close	Daily Change %	MTD %	YTD %
Dow Jones	25,313	0.0	-0.4	2.4
Nasdaq	7,408	0.0	2.4	15.8
S&P 500	2,833	0.0	0.6	6.0
FTSE 100	7,667	0.0	-1.1	-0.3
Germany DAX 30	12,424	0.0	-3.0	-3.8
France CAC 40	5,415	0.0	-1.8	1.9
Japan Nikkei 225	22,298	0.0	0.0	-2.1
Hong Kong Hang Seng	28,367	0.0	-0.8	-5.2
China Shanghai Composite	2,795	0.0	-2.8	-15.5
Australia ASX 200	6,278	0.0	0.0	3.5
India Sensex	37,869	0.0	0.7	11.2

Commodity Markets

Commodity	Price	Daily Change %	MTD %	YTD %
Arab Light Crude (\$/bbl)	73.0	0.0	-5.8	12.2
Brent Crude (\$/bbl)	72.8	0.0	-1.9	8.9
Texas crude (\$/bbl)	67.6	0.0	-3.2	11.8
Natural Gas (\$/mmbtu)	2.94	0.0	5.8	-0.3
Gold (\$/oz)	1,211	0.0	-1.0	-7.0
Silver (\$/oz)	15.3	0.0	-1.6	-9.9
Steel (\$/ton)	901	0.0	-1.0	36.1
Iron Ore (CNY/MT)	503	0.0	15.4	3.0
Wheat (\$/bu)	547	0.0	-1.3	28.0
Corn (\$/bu)	358	0.0	-3.9	2.0
Sugar (\$/lb)	10.5	0.0	-0.1	-30.5
SMP* (EUR/MT)	1,563	0.0	6.3	12.1

*SMP: Skimmed Milk Powder

Interbank Rates

Region	Rate*	Daily Change (bps)	MTD (bps)	YTD (bps)
USD LIBOR	2.319	0.0	-2.9	62.5
Saudi Arabia (SAIBOR)	2.608	0.0	-0.1	71.1
UAE (EIBOR)	2.576	0.1	-4.3	78.1
Kuwait (KIBOR)	2.000	0.0	-6.3	12.5
Qatar (QIBOR)	2.650	1.6	0.7	0.3
Bahrain (BHIBOR)	3.525	0.0	2.5	80.0

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

Data Sources: Tadawul, Bloomberg, Reuters

Regional and International Markets

- Among other regional markets, Dubai and Abu Dhabi decreased 1.0% and 0.6%, respectively. Kuwait, Qatar, Oman, Bahrain and Egypt decreased 0.2%, 2.5%, 0.6%, 0.1% and 1.2%, respectively.
- The US CPI rose 0.2% MoM in July (in line with the consensus), compared with 0.1% in June, while on a YoY basis, CPI growth remained unchanged at 2.9% in July (in line with the consensus). The CPI, excluding food and energy, remained unchanged at 0.2% MoM in July (in line with the consensus), while on a YoY basis, it improved 2.4% YoY in July (consensus: 2.3%), against 2.3% YoY in June. (Source: Econoday)
- The UK GDP increased 0.4% QoQ in 2Q2018 (in line with the consensus), compared with 0.2% in 1Q2018. On a YoY basis, the GDP rose 1.3% in 2Q2018 (in line with the consensus), against 1.2% in 1Q2018. Business investment grew moderately by 0.5%, although witnessing a drop previously. Household spending was up 0.3%, contributing just 0.2 percentage points, and the government's current consumption rose 0.4%. (Source: Econoday)
- UK industrial production improved 0.4% MoM in June (in line with the consensus), against decline of 0.2% in May, while on a YoY basis, it increased 1.1% in June (consensus: 0.7%), compared with 1.2% in May. Manufacturing output rose 0.4% MoM in June (consensus: 0.3%), against 0.6% in May. (Source: Econoday)

Forex / Currency

Currency	Close	Daily Change %	MTD %	YTD %
Dollar Index	96.4	0.0	2.0	4.6
Euro	1.14	0.0	-2.4	-4.9
Japanese Yen	110.9	0.0	-0.8	-1.6
Sterling Pound	1.28	0.0	-2.7	-5.5
Chinese Yuan	6.85	0.0	0.6	5.2
Indian Rupee	68.9	0.0	0.6	7.9
UAE Dirham	3.67	0.0	0.0	0.0
Qatari Rial	3.64	0.0	0.0	0.0
Kuwaiti Dinar	0.30	0.1	0.2	0.6
Omani Rial	0.38	0.0	0.0	0.1
Bahraini Dinar	0.38	0.0	-0.2	0.1
Egyptian Pound	17.85	0.1	0.1	0.6

Corporate Calendar

Date	Company	Event
13 th Aug	Arriyadh Development	Cash Dividend Distribution
15 th Aug	Sipchem	Cash Dividend Distribution
16 th Aug	STC	Cash Dividend Distribution
16 th Aug	SABB	Cash Dividend Distribution
16 th Aug	Al Kathiri Holding	Cash Dividend Distribution
29 th Aug	QACO	EGM

*EGM: Extra Ordinary Meeting

*OGM: Ordinary General Meeting

13 August 2018

Daily Report



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Head of Research

Talha Nazar

+966 11 2256250

t.nazar@aljaziracapital.com.sa

Analyst

Sultan Al Kadi, CAIA

+966 11 2256374

s.alkadi@aljaziracapital.com.sa

Analyst

Jassim Al-Jubran

+966 11 2256248

j.aljabran@aljaziracapital.com.sa

Analyst

Waleed Al-Jubayr

+966 11 2256146

W.aljubayr@aljaziracapital.com.sa

Analyst

Muhanad Al-Odan

+966 11 2256115

m.alodan@aljaziracapital.com.sa

General Manager - Brokerage Division

Mr. Ala'a Al-Yousef

+966 11 2256000

a.yousef@aljaziracapital.com.sa

AGM-Head of international and
institutional brokerage

LuayJawad Al-Motawa

+966 11 2256277

lalmutawa@aljaziracapital.com.sa

Regional Manager - West and South Regions

Mansour Hamad Al-Shuaibi

+966 12 6618443

m.alshuaibi@aljaziracapital.com.sa

Sales And Investment Centers Central
Region Manager

Sultan Ibrahim AL-Mutawa

+966 11 2256364

s.almutawa@aljaziracapital.com.sa

Area Manager –Qassim & Eastern
Province

Abdullah Al-Rahit

+966 16 3617547

aalrahit@aljaziracapital.com.sa

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