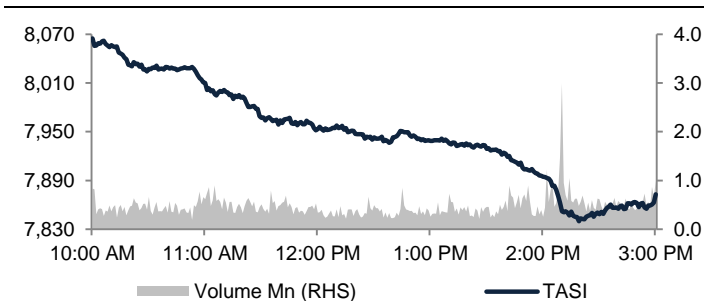


Saudi Stock Exchange

Index	Closing	High	Low	Daily Change %	YTD %
TASI	7,873	8,063	7,840	(2.4)	8.9
NOMU	2,623	2,805	2,464	(6.5)	(16.5)

TASI movement during session



Index	Close	Daily Change %	% YTD	PE (TTM)
Energy	4,818	(0.4)	12.6	16.4
Materials	5,724	(2.3)	13.3	21.1
Capital Goods	3,730	(1.7)	(14.1)	-27.4
Commercial Service	4,495	(0.9)	6.9	19.3
Transportation	3,706	(1.1)	(7.6)	17.6
Consumer Durables	3,699	(2.0)	(10.7)	-18.0
Consumer Services	3,195	(2.4)	(13.3)	13.9
Media	11,433	(4.4)	47.8	471.1
Retailing	6,166	(1.7)	9.5	20.2
Food & Staples	6,140	(0.7)	9.4	18.2
Food & Beverages	4,264	(3.1)	(12.9)	25.9
Healthcare	4,184	(1.2)	(5.8)	19.0
Pharma & Bio Tech	4,123	(1.7)	3.8	24.7
Banks	6,809	(3.0)	23.8	12.8
Diversified Financials	3,594	(2.0)	(10.8)	-33.9
Insurance	3,862	(1.9)	(18.2)	31.3
Telecom	5,001	(2.6)	17.6	30.1
Utilities	3,847	0.2	(15.6)	68.4
REITs	3,711	(1.1)	(19.9)	54.7
Real Estate	3,482	(1.1)	(25.9)	28.3

Average Index Value

Average 5 days	Average 10 days	Average 20 days	Average value traded for the month (bn)
8,113	8,188	8,297	4.01

Market Statistics

	Value Traded (SAR bn)	Volumes (mn shares)	No. of Trades ('000 shares)
Current Week	7.0	275.5	202.9
Previous week	21.7	760.0	496.5

Top Gainers

Company	Price	Change%
Sagr Insurance	13.78	6.0
SWICORP	9.09	2.7
Extra	51.10	2.2
Alujain	32.00	1.4
Zoujaj	18.88	1.3

Top Losers

Company	Price	Change%
SCC	39.75	-7.6
SACO	76.90	-5.6
RIBL	16.60	-5.1
BSFR	32.15	-4.9
APC	10.16	-4.9

Top Weighted Companies

Company	Price	Change%
Al Rajhi	84.00	-2.6
SABIC	123.20	-2.4
NCB	41.20	-3.7
SAMBA	30.80	-1.9
STC	81.60	-2.5

Major Economic News

- The Organization of Petroleum Exporting Countries (OPEC) reduced its projections for oil demand growth for 2018 and 2019 by 20,000 barrels per day (bpd). Total oil demand is forecast to reach 98.83mn bpd. (Source: Argaam)
- According to Bloomberg, Saudi Arabia's Public Investment Fund (PIF) is in discussions to become a "significant" investor in Tesla as a part of Elon Musk's offer to take the company private. It added that PIF assumes this investment as a hedge against oil. (Source: Argaam)

Major Corporate News

- The Saudi Stock Exchange (Tadawul) resumed the trading of Alujain Corp.'s shares after the company released its financial statements for 2Q2018. Earlier, the exchange suspended trading on Alujain's shares after the company defaulted in disclosing its financial statements within the specified period. (Source: Argaam)
- Mushkara REIT Fund announced a 3.5% cash dividend for a period of six months (from February 17, 2018 to August 17, 2018) at SAR 0.35 per unit, amounting to SAR 30.8mn. The dividend represents 3.45% of net assets based on the fair market value as of June 30, 2018. (Source: Argaam)
- The Capital Market Authority (CMA) announced the termination of Saudi Indian Company for Cooperative Insurance (Wafa Insurance) on September 11 under the Saudi Companies Law if it fails to hold an extraordinary general assembly meeting within 45 days from the date its board of directors were informed of losses. (Source: Argaam)
- L'Azurde for Jewelry Co. is planning to enhance its performance by reviewing its network of 14 stores in KSA and may shut or relocate some outlets. Moreover, the jewelry maker is planning to expand its presence in Egypt, where it enjoys strong return on investment (ROI). (Source: Argaam)

Market Analysis

- The Saudi Stock Exchange decreased 2.4% to 7,872.8 on Monday. The value traded stood at SAR 3.7bn (down 12.2% over previous day), while the advance-decline ratio stood at 18/165. The parallel market index decreased 6.6% to 2,623.4 points. The value traded stood at SAR 3.7mn (up 159.4% over previous day). Most sectors in the main market ended in the red. Utilities (up 0.2%) advanced the most; Media and Food & Beverages (down 4.4% and 3.1%, respectively) led the laggards.

Regional Markets

Market	Close	Daily Change %	MTD %	YTD %
Dubai (DFM)	2,847	-1.5	-3.7	-15.5
Abu Dhabi (ADX)	4,801	-0.9	-1.2	9.2
Kuwait (KSE)	4,918	-0.7	-0.3	**NA
Qatar (QE)	9,557	-0.8	-2.7	12.1
Oman (MSM)	4,382	-0.6	1.0	-14.1
Bahrain (BSE)	1,346	-0.2	-0.9	1.1
Egypt (EGX30)	15,522	-1.4	-0.4	3.3

International Markets

Index	Close	Daily Change %	MTD %	YTD %
Dow Jones	25,188	-0.5	-0.9	1.9
Nasdaq	7,401	-0.1	2.3	15.7
S&P 500	2,822	-0.4	0.2	5.5
FTSE 100	7,642	-0.3	-1.4	-0.6
Germany DAX 30	12,359	-0.5	-3.5	-4.3
France CAC 40	5,412	0.0	-1.8	1.9
Japan Nikkei 225	21,857	-2.0	-2.0	-4.0
Hong Kong Hang Seng	27,937	-1.5	-2.3	-6.6
China Shanghai Composite	2,786	-0.3	-3.1	-15.8
Australia ASX 200	6,252	-0.4	-0.4	3.1
India Sensex	37,645	-0.6	0.1	10.5

Commodity Markets

Commodity	Price	Daily Change %	MTD %	YTD %
Arab Light Crude (\$/bbl)	73.1	0.1	-5.7	12.3
Brent Crude (\$/bbl)	72.6	-0.3	-2.2	8.6
Texas crude (\$/bbl)	67.3	-0.5	-3.8	11.2
Natural Gas (\$/mmbtu)	2.93	-0.5	5.3	-0.8
Gold (\$/oz)	1,193	-1.5	-2.5	-8.4
Silver (\$/oz)	15.0	-2.1	-3.6	-11.8
Steel (\$/ton)	897	-0.4	-1.4	35.5
Iron Ore (CNY/MT)	503	0.0	15.4	3.0
Wheat (\$/bu)	534	-2.4	-3.7	24.9
Corn (\$/bu)	357	-0.3	-4.2	1.6
Sugar (\$/lb)	10.3	-2.3	-2.4	-32.1
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)	2.535	-4.1	-8.4	74.0
Kuwait (KIBOR)	2.000	0.0	-6.3	12.5
Qatar (QIBOR)	2.650	0.0	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

Updated as of August 14, 2018

Regional and International Markets

- Among other regional markets, Dubai and Abu Dhabi decreased 1.5% and 0.9%, respectively. Kuwait, Qatar, Oman, Bahrain and Egypt decreased 0.7%, 0.8%, 0.6%, 0.2% and 1.4%, respectively.
- Chinese industrial production increased 0.48% MoM in July compared with 0.35% in June. On YoY basis, growth remained unchanged at 6.0% in July (consensus: 6.4%). Manufacturing production rose 6.2% YoY in July, up from 6.0% in June; however, the utilities sector slipped to 9.0% YoY in July from 9.2% in June. Mining output declined to 1.3% YoY from 2.7%. (Source: Econoday)
- Chinese retail sales grew 8.8% YoY in July (consensus: 9.0%) compared with 9.0% in June. Retail sales increased 0.67% MoM in July, followed by an increase of 0.74% in June. Urban retail sales growth accelerated 8.6% in July against 8.8% in June, while rural retail sales growth slowed to 10.1% in July from 10.4% in June. (Source: Econoday)
- Oil prices dropped 0.3% on Monday after data suggested stocks at the US crude delivery hub increased in the latest week. Moreover, concerns regarding troubled emerging markets and trade worries would dent the prospects for fuel demand.
- Gold prices fell 1.5% on Monday, as an increasing dollar overshadowed worries regarding political uncertainty and economic distresses in Turkey that rattled emerging markets.

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	110.7	-0.2	-1.0	-1.7
Sterling Pound	1.28	0.0	-2.7	-5.5
Chinese Yuan	6.89	0.6	1.2	5.9
Indian Rupee	70.0	1.6	2.3	9.7
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	0.2	0.6
Omani Rial	0.38	0.0	0.0	0.1
Bahraini Dinar	0.38	0.0	-0.2	0.0
Egyptian Pound	17.88	0.2	0.3	0.8

Corporate Calendar

Date	Company	Event
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
02 nd Sep	Wafrah	OGM

*EGM: Extra Ordinary Meeting

*OGM: Ordinary General Meeting

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