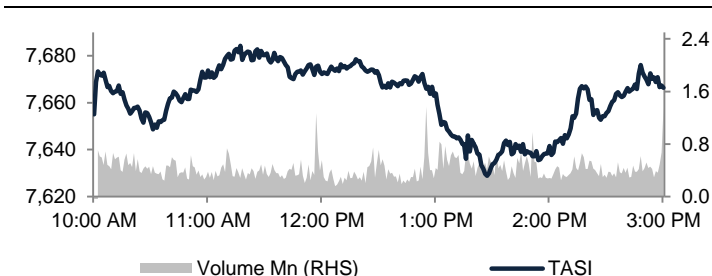


Saudi Stock Exchange

Index	Closing	High	Low	Daily Change %	YTD %
TASI	7,662	7,685	7,629	0.0	6.0
NOMU	2,431	2,431	2,431	(0.1)	(22.6)

TASI movement during session



Index	Close	Daily Change %	% YTD	PE (TTM)
Energy	4,818	(0.3)	12.6	16.4
Materials	5,410	(0.2)	7.0	17.2
Capital Goods	4,174	(1.3)	(3.9)	-20.8
Commercial Service	4,287	(0.7)	1.9	18.5
Transportation	3,598	(0.2)	(10.3)	21.5
Consumer Durables	3,676	0.9	(11.2)	-33.1
Consumer Services	3,123	0.4	(15.3)	17.5
Media	11,455	(0.8)	48.1	68.8
Retailing	6,530	0.5	15.9	24.6
Food & Staples	5,883	1.1	4.9	18.0
Food & Beverages	3,842	0.0	(21.6)	25.0
Healthcare	3,610	0.2	(18.8)	17.1
Pharma & Bio Tech	3,826	0.2	(3.7)	24.6
Banks	6,809	(0.0)	23.8	12.4
Diversified Financials	3,372	(0.8)	(16.3)	-27.5
Insurance	3,826	0.1	(19.0)	31.1
Telecom	4,997	0.6	17.5	28.2
Utilities	3,287	(0.1)	(27.9)	92.3
REITs	3,613	(0.2)	(22.0)	15.8
Real Estate	3,332	1.0	(29.1)	20.0

Average Index Value

Average 5 days	Average 10 days	Average 20 days	Average value traded for the month (bn)
7,717	7,767	7,743	3.00

Market Statistics

	Value Traded (SAR bn)	Volumes (mn shares)	No. of Trades ('000 shares)
Current Week	-	-	-
Previous week	15.6	671.2	591.2

Top Gainers

Company	Price	Change%
GACO	10.70	6.6
ALJOUF	22.34	4.4
TADCO	10.18	4.0
AlSorayai Group	13.62	4.0
METLIFE AIG ANB	20.56	3.6

Top Losers

Company	Price	Change%
SIECO	134.00	-10.0
SAFCO	76.50	-4.3
SWICORP WABEL	8.60	-4.0
SFICO	26.50	-3.5
Al-baha	20.00	-3.1

Top Weighted Companies

Company	Price	Change%
Al Rajhi	84.30	-0.5
SABIC	119.80	-0.7
NCB	43.40	0.5
SAMBA	28.95	-1.2
STC	83.50	0.6

Major Economic News

- Saudi Arabia is to invest USD 1.6bn in research and development in the next two years; the investment is anticipated to increase the capacity and capability of publicly funded universities. Furthermore, with the funding, KSA aims to propel five institutions into the top 100 international university rankings by 2030. (Source: Argaam)
- Saudi Arabia's Minister of Finance, Mohammed Al-Jadaan, announced at the Financial Stability Forum 2018 that the economy has grown significantly year-to-date, supported by the economic consolidation plan and other financial measures from the Kingdom's Fiscal Balance Program 2020. (Source: Argaam)
- Saudi Arabian Monetary Authority (SAMA) governor, Ahmed Al-Khulaifi, indicated that the Public Debt Management Office's issuance of local bonds did not compete with the private sector for borrowing or liquidity, and thus did not affect the office. Furthermore, at the Financial Stability 2018 seminar, he added that SAMA is monitoring liquidity as it is important that liquidity volumes match economic activities in the Kingdom. (Source: Argaam)

Major Corporate News

- Dallah Healthcare Co. announced that it extended a joint venture (JV) agreement with AWJ Investment Co. to build and operate a hospital in Jeddah for seven months. The company added that the extension would allow both parties to obtain the necessary approvals. (Source: Argaam)
- Abdullah Al Othaim Markets Co. announced that the company launched a new outlet in Egypt, bringing its number of branches in the country to 45. The retailer opened several branches lately in KSA and Egypt as part of its expansion plans. (Source: Argaam)

Market Analysis

- The Saudi Stock Exchange remained flat at 7,662.2 on Thursday. The value traded stood at SAR 2.9bn (down 17.7% over previous day), while the advance-decline ratio stood at 89/84. The parallel market index decreased 0.1% to 2,431.4 points. The value traded stood at SAR 0.2mn (down 16.1% over previous day). Most sectors in the main market ended in the green. Food & Staples and Real Estate (up 1.1% and 1.0%, respectively) advanced the most; Capital Goods and Diversified Financials (down 1.3% and 0.8%, respectively) led the laggards.

Regional Markets

Market	Close	Daily Change %	MTD %	YTD %
Dubai (DFM)	2,779	0.1	-0.2	-17.5
Abu Dhabi (ADX)	5,055	0.7	3.1	14.9
Kuwait (KSE)	4,747	0.0	1.1	**NA
Qatar (QE)	10,214	0.1	-0.8	19.8
Oman (MSM)	4,450	-0.4	0.6	-12.7
Bahrain (BSE)	1,309	-0.1	-0.4	-1.7
Egypt (EGX30)	13,682	1.4	3.3	-8.9

International Markets

Index	Close	Daily Change %	MTD %	YTD %
Dow Jones	25,413	0.5	1.2	2.8
Nasdaq	6,867	-0.3	-1.4	7.4
S&P 500	2,736	0.2	0.9	2.3
FTSE 100	7,014	-0.3	-1.6	-8.8
Germany DAX 30	11,341	-0.1	-0.9	-12.2
France CAC 40	5,025	-0.2	-1.3	-5.4
Japan Nikkei 225	21,680	-0.6	-1.1	-4.8
Hong Kong Hang Seng	26,184	0.3	4.8	-12.5
China Shanghai Composite	2,679	0.4	2.9	-19.0
Australia ASX 200	5,731	-0.1	-1.7	-5.5
India Sensex	35,457	0.6	2.9	4.1

Commodity Markets

Commodity	Price	Daily Change %	MTD %	YTD %
Arab Light Crude (\$/bbl)	67.7	1.3	-11.3	4.0
Brent Crude (\$/bbl)	66.8	0.2	-11.5	-0.2
Texas crude (\$/bbl)	56.5	0.1	-13.5	-6.6
Natural Gas (\$/mmbtu)	4.27	5.8	31.0	44.7
Gold (\$/oz)	1,221	0.7	0.6	-6.2
Silver (\$/oz)	14.4	0.9	1.3	-15.0
Steel (\$/ton)	800	-0.1	-3.7	20.8
Iron Ore (CNY/MT)	566	3.9	1.9	16.0
Wheat (\$/bu)	507	0.2	1.2	18.7
Corn (\$/bu)	365	-0.7	0.4	4.0
Sugar (\$/lb)	12.7	0.3	-3.8	-16.3
SMP* (EUR/MT)	1,676	0.0	6.2	20.2

*SMP: Skimmed Milk Powder

Interbank Rates

Region	Rate*	Daily Change (bps)	MTD (bps)	YTD (bps)
USD LIBOR	2.645	0.4	8.6	95.0
Saudi Arabia (SAIBOR)	2.806	0.6	4.3	91.0
UAE (EIBOR)	2.850	5.1	8.6	105.5
Kuwait (KIBOR)	2.125	0.0	6.3	25.0
Qatar (QIBOR)	2.786	-0.8	-2.2	13.9
Bahrain (BHIBOR)	3.675	0.0	-2.5	95.0

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

Data Sources: Tadawul, Bloomberg, Reuters

Updated as of November 18, 2018

Regional and International Markets

- Among other regional markets, Dubai and Abu Dhabi increased 0.1% and 0.7%, respectively. Qatar and Egypt increased 0.1% and 1.4%, respectively, while Oman and Bahrain decreased 0.4% and 0.1%, respectively. Meanwhile, Kuwait remained flat.
- According to the Baker-Hughes Rig Count, rig count in the North America increased to 1279 in the week ended November 16 from 1277 prior. Rig count in the US increased to 1082 from 1081 while rig count in the Canada rose to 197 from 196. In the Gulf of Mexico, rig count increased to 22 from 21. (Source: Econoday)
- According to the Energy Information Administration (EIA), oil inventories in the US increased 10.3mn barrels (prior: up 5.8mn) to 442.1mn in the week ended November 9. Distillate inventories fell 3.6mn barrels (prior: down 3.5mn) to 119.3mn, and gasoline inventories decreased 1.4mn barrels (prior: up 1.9mn) to 226.6mn. (Source: Econoday)
- Oil prices edged up 0.2% on Friday, supported by expectations that the OPEC nations would agree to cut output next month, though prices declined for the sixth straight week amid global oversupply worries.
- Gold prices rose 0.7% on Friday as investors pursue safe-haven assets amid concerns of a chaotic exit of Britain from the European Union.

Forex / Currency

Currency	Close	Daily Change %	MTD %	YTD %
Dollar Index	96.5	-0.5	-0.7	4.7
Euro	1.14	0.8	1.0	-4.8
Japanese Yen	112.8	-0.7	-0.1	0.1
Sterling Pound	1.28	0.5	0.6	-5.0
Chinese Yuan	6.94	0.0	-0.5	6.6
Indian Rupee	72.0	0.1	-2.7	12.8
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	0.1	0.9
Omani Rial	0.38	-0.1	-0.1	0.0
Bahraini Dinar	0.38	0.0	0.0	0.0
Egyptian Pound	17.86	0.0	0.0	0.7

Corporate Calendar

Date	Company	Event
20 th Nov	STC	Cash Dividend Distribution
21 st Nov	Saudi Cement	EGM
21 st Nov	Jarir	Cash Dividend Distribution
22 nd Nov	Anaam Holding	OGM
22 nd Nov	Bupa Arabia	EGM
25 th Nov	QACCO	Cash Dividend Distribution

*EGM: Extra Ordinary Meeting

*OGM: Ordinary General Meeting

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