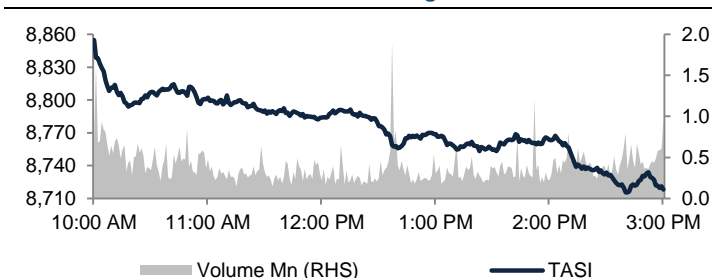


Saudi Stock Exchange

Index	Closing	High	Low	Daily Change %	YTD %
TASI	8,729	8,844	8,714	(1.5)	11.5
NomuC	3,782	3,794	3,761	0.5	36.1

TASI movement during session



Index	Close	Daily Change %	% YTD	PE (TTM)
Energy	4,585	(0.2)	(5.4)	17.4
Materials	5,419	(1.1)	3.2	16.8
Capital Goods	3,863	(0.6)	(1.0)	-17.2
Commercial Service	4,537	(1.5)	9.7	19.3
Transportation	3,788	(0.4)	8.9	22.4
Consumer Durables	3,468	0.9	(5.4)	-83.6
Consumer Services	3,606	0.2	22.3	311.6
Media	10,863	(2.3)	6.7	61.5
Retailing	7,440	(0.6)	8.4	34.9
Food & Staples	6,788	0.0	14.2	26.9
Food & Beverages	4,130	(1.0)	6.2	61.8
Healthcare	3,868	(1.1)	2.9	20.2
Pharma & Bio Tech	3,430	(0.4)	(11.6)	23.9
Banks	8,529	(2.1)	18.2	15.3
Diversified Financials	3,358	(0.4)	(3.5)	-26.9
Insurance	4,372	(0.6)	4.7	82.9
Telecom	6,839	(1.3)	26.5	35.6
Utilities	4,293	(1.3)	27.4	222.5
REITs	3,866	0.1	6.7	16.9
Real Estate	3,248	(0.7)	0.7	23.5
Software & Services	6,356	0.4	N.A.	N.A.

Average Index Value

Average 5 days	Average 10 days	Average 20 days	Average value traded for the month (bn)
8,798	8,904	8,900	2.86

Market Statistics

	Value Traded (SAR bn)	Volumes (mn shares)	No. of Trades ('000 shares)
Current Week	5.0	201.5	223.0
Previous week	14.3	518.0	466.4

Top Gainers

Company	Price	Change%
NCLE	25.80	10.0
AlSorayai Group	9.43	9.9
SVCP	45.90	2.9
Petrochem	23.60	2.5
SIIG	23.32	2.5

Top Losers

Company	Price	Change%
Dallah Health	52.10	-6.0
EPCCO	32.80	-4.1
Alinma	24.74	-3.7
SACO	65.00	-3.3
spcc	56.40	-3.1

Top Weighted Companies

Company	Price	Change%
Al Rajhi	68.00	-3.0
NCB	54.80	-0.4
SABIC	108.40	-1.6
STC	108.80	-1.3
Riyad	26.55	-1.7

Major Economic News

- According to the Saudi Arabian Monetary Authority (SAMA), point-of-sale (PoS) transactions in KSA increased 7.0% in June 2019 to SAR 20.7bn as against SAR 19.3bn in June 2018. Total of 113.8mn transactions were processed through about 388,000 points-of-sales in shopping malls, retail stores and pharmacies. (Source: Argaam)
- According to the data published by SAMA, KSA's foreign reserves grew by about SAR 20.6bn M/M to SAR 497.6bn in June 2019. Meanwhile, KSA's current account declined by SAR 34.6bn in June to around SAR 100.1bn, as compared to the last month. (Source: Argaam)
- Assets held by the Saudi Arabian Monetary Authority (SAMA) decreased by SAR 3.2bn M/M to around SAR 1.96tn in June 2019. On a Y/Y basis, assets grew by about SAR 25.2bn. SAMA's investments in foreign securities fell 2.0% Y/Y to SAR 1.19tn in June 2019. (Source: Argaam)

Major Corporate News

- Saud Qahtani Auction Co. won new agreements in the Southern Province, in line with its expansionary plan in KSA. These auction projects, which include Abha, Khamis Mushait and Jizan, are scheduled to take place in Q3-19. (Source: Argaam)

Earnings update (Net Profit)

Company	Q2-19	Q2-18	Y/Y %
Saudi Cement Co.	92.3	58.0	59.1
Rajhi Bank	2,580	2,474	4.3
Riyad bank	1,500	842	78.1
Halwani Bros.	(3.7)	8.5	N.M.
Saudi Ground	123.9	112.7	9.9
National Petrochemical Co.	183.0	288.0	(36.5)
Yamama Cement Co.	53.2	(36.3)	N.M.

Market Analysis

- The Saudi Stock Exchange decreased 1.5% to 8,729.1 on Monday. The value traded stood at SAR 3.0bn (up 51.0% over previous day), while the advance-decline ratio stood at 44/138. The parallel market index increased 0.5% to 3,782.0 points. The value traded stood at SAR 1.8mn (up 70.2% over previous day). Most sectors in the main market ended in the red. Consumer Durables and Software & Services (up 0.9% and 0.4%, respectively) advanced the most; Media and Banks (down 2.3% and 2.1%, respectively) led the laggards.

Regional Markets

Market	Close	Daily Change %	MTD %	YTD %
Dubai (DFM)	2,881	1.2	8.3	13.9
Abu Dhabi (ADX)	5,363	0.3	7.7	9.1
Kuwait (KSE)	4,916	0.3	3.1	3.7
Qatar (QE)	10,603	0.3	1.4	3.0
Oman (MSM)	3,751	0.1	-3.4	-13.2
Bahrain (BSE)	1,536	0.5	4.4	14.9
Egypt (EGX30)	13,422	-0.3	-4.8	3.0

International Markets

Index	Close	Daily Change %	MTD %	YTD %	P/E
Dow Jones	27,221	0.1	2.3	16.7	18.0
Nasdaq	7,989	-0.3	4.1	26.2	25.0
S&P 500	3,021	-0.2	2.7	20.5	19.7
FTSE 100	7,687	1.8	3.5	14.2	17.8
Germany DAX 30	12,417	0.0	0.2	17.6	18.1
France CAC 40	5,601	-0.2	1.1	18.4	19.5
Japan Nikkei 225	21,617	-0.2	1.6	8.0	16.4
Hong Kong Hang Seng	28,106	-1.0	-1.5	8.7	11.0
China Shanghai Composite	2,941	-0.1	-1.3	17.9	14.4
Australia ASX 200	6,826	0.5	3.1	20.9	18.4
India Sensex	37,686	-0.5	-4.3	4.5	26.7

Commodity Markets

Commodity	Price	Daily Change %	MTD %	YTD %
Arab Light Crude (\$/bbl)	64.7	-1.2	-3.7	19.3
Brent Crude (\$/bbl)	63.7	0.4	-4.3	18.4
Texas crude (\$/bbl)	56.9	1.4	-2.3	25.9
Natural Gas (\$/mmbtu)	2.14	-1.3	-7.2	-27.2
Gold (\$/oz)	1,427	0.6	1.2	11.2
Silver (\$/oz)	16.5	0.4	7.5	6.3
Steel (\$/ton)	538	0.0	0.4	-25.4
Iron Ore (CNY/MT)	955	-0.2	1.0	76.6
Wheat (\$/bu)	504	1.5	-4.6	0.0
Corn (\$/bu)	417	0.6	-0.8	11.2
Sugar (\$/lb)	12.1	0.4	-2.0	0.3
SMP* (EUR/MT)	2,100	0.7	1.8	16.0

*SMP: Skimmed Milk Powder

Interbank Rates

Region	Rate*	Daily Change (bps)	MTD (bps)	YTD (bps)
USD LIBOR	2.266	0.0	-5.4	-54.2
Saudi Arabia (SAIBOR)	2.641	-0.3	-7.1	-33.4
UAE (EIBOR)	2.667	16.1	8.7	-17.0
Kuwait (KIBOR)	NA	NA	NA	NA
Qatar (QIBOR)	2.775	0.0	6.3	-13.1
Bahrain (BHIBOR)	3.150	0.0	3.3	-80.0

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

Data Sources: Tadawul, Bloomberg, Reuters

Updated as of July 30, 2019

Regional and International Markets

- Among other regional markets, Dubai and Abu Dhabi increased 1.2% and 0.3%, respectively. Kuwait, Qatar, Oman and Bahrain increased 0.3%, 0.3%, 0.1% and 0.5%, respectively, while Egypt decreased 0.3%.
- According to the US Dallas Fed Mfg Survey, production index surged to 9.3 in July from 8.9 in the prior month. General Activity Index improved to -6.3 (consensus: -3.5) in July from a negative 12.1 in June. New orders increased by 1.8 points to 5.5; while the growth rate of orders rose 8 points to 2.7. (Source: Econoday)
- Japan's industrial production fell 3.6% M/M in June (consensus: -1.0%) against an increase of 2.0% in May. On a Y/Y basis, it decreased 4.1% in June compared with a fall of 2.1% in the prior month. Current report shows that officials expect industrial production to rebound with a 2.7% growth in July and improve further with 0.3% in August. (Source: Econoday)
- Oil prices rose 0.4% on Monday, driven by expectations of the first U.S. interest rate cut in a decade, overshadowing the demand concerns.
- Gold prices rose 0.6% on Monday ahead of expectations that the Federal Reserve is likely to cut interest rates this week.

Forex / Currency

Currency	Close	Daily Change %	MTD %	YTD %
Dollar Index	98.0	0.0	2.0	1.9
Euro	1.11	0.2	-2.0	-2.8
Japanese Yen	108.8	0.1	0.8	-0.7
Sterling Pound	1.22	-1.3	-3.8	-4.2
Chinese Yuan	6.89	0.2	0.4	0.3
Indian Rupee	68.8	-0.2	-0.3	-1.2
UAE Dirham	3.67	0.0	0.0	0.0
Qatari Rial	3.64	0.0	0.1	0.0
Kuwaiti Dinar	0.30	-0.1	0.3	0.4
Omani Rial	0.38	0.0	0.0	0.0
Bahraini Dinar	0.38	0.0	-0.1	0.0
Egyptian Pound	16.54	0.0	-0.7	-7.4

Corporate Calendar

Date	Company	Event
30 th Jul	SAFCO	Cash Dividend Distribution
31 st Jul	Allianz SF	OGM
31 st Jul	Derayah REIT	Cash Dividend Distribution
01 st Aug	Al Rajhi	Cash Dividend Distribution
01 st Aug	ATC	EGM
01 st Aug	Al Rajhi	Cash Dividend Distribution

*EGM: Extra Ordinary Meeting

*OGM: Ordinary General Meeting

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