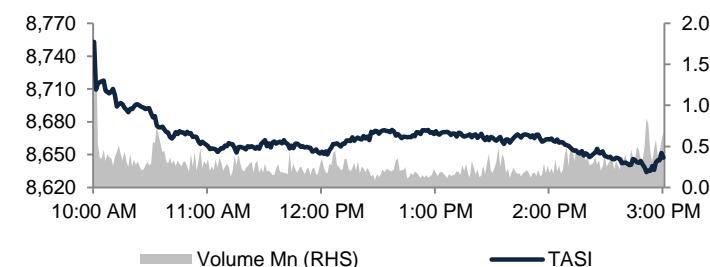


Saudi Stock Exchange

| Index | Closing | High | Low | Daily Change % | YTD % |
|-------|---------|-------|-------|----------------|-------|
| TASI | 8,666 | 8,720 | 8,632 | (0.8) | 10.7 |
| NomuC | 3,776 | 3,799 | 3,776 | (0.8) | 35.9 |

TASI movement during session



| Index | Close | Daily Change % | % YTD | PE (TTM) |
|------------------------|--------|----------------|--------|----------|
| Energy | 4,482 | (0.5) | (7.6) | 17.0 |
| Materials | 5,377 | (0.4) | 2.4 | 16.7 |
| Capital Goods | 3,874 | 0.1 | (0.7) | -17.2 |
| Commercial Service | 4,482 | (0.6) | 8.3 | 19.1 |
| Transportation | 3,860 | 0.1 | 11.0 | 22.8 |
| Consumer Durables | 3,491 | (0.2) | (4.7) | -84.2 |
| Consumer Services | 3,529 | (1.3) | 19.7 | 305.0 |
| Media | 10,612 | (1.9) | 4.3 | 60.1 |
| Retailing | 7,445 | 0.1 | 8.4 | 34.9 |
| Food & Staples | 6,775 | (0.5) | 14.0 | 26.8 |
| Food & Beverages | 4,179 | (0.0) | 7.5 | 62.5 |
| Healthcare | 3,808 | (0.8) | 1.3 | 19.9 |
| Pharma & Bio Tech | 3,417 | (1.1) | (11.9) | 23.8 |
| Banks | 8,458 | (1.2) | 17.2 | 15.1 |
| Diversified Financials | 3,345 | (0.5) | (3.8) | -26.8 |
| Insurance | 4,392 | (0.0) | 5.2 | 83.3 |
| Telecom | 6,841 | 0.3 | 26.6 | 35.6 |
| Utilities | 4,261 | 0.1 | 26.5 | 220.9 |
| REITs | 3,858 | (0.4) | 6.5 | 16.9 |
| Real Estate | 3,187 | (1.0) | (1.2) | 23.1 |
| Software & Services | 6,144 | (0.9) | N.A. | N.A. |

Average Index Value

| Average 5 days | Average 10 days | Average 20 days | Average value traded for the month (bn) |
|----------------|-----------------|-----------------|---|
| 8,746 | 8,799 | 8,880 | 2.84 |

Market Statistics

| | Value Traded (SAR bn) | Volumes (mn shares) | No. of Trades ('000 shares) |
|---------------|-----------------------|---------------------|-----------------------------|
| Current Week | - | - | - |
| Previous week | 12.8 | 489.3 | 575.8 |

Top Gainers

| Company | Price | Change% |
|--------------|-------|---------|
| CHUBB | 24.54 | 7.2 |
| ATAA | 33.15 | 3.9 |
| ALABDULLATIF | 11.78 | 3.9 |
| ALDREES | 39.45 | 1.9 |
| TCC | 14.26 | 1.9 |

Top Losers

| Company | Price | Change% |
|---------------|-------|---------|
| SAMBA | 31.30 | -4.3 |
| SAIB | 18.02 | -4.2 |
| ALAHLI REIT 1 | 8.27 | -3.4 |
| ALUJAIN | 22.90 | -3.4 |
| HERFY FOODS | 52.10 | -3.2 |

Top Weighted Companies

| Company | Price | Change% |
|----------|--------|---------|
| Al Rajhi | 67.60 | -1.7 |
| NCB | 54.90 | 0.0 |
| SABIC | 106.40 | -0.9 |
| STC | 108.60 | 0.6 |
| Riyad | 26.20 | 0.8 |

Major Economic News

- According to the data published by the Saudi Arabian Monetary Authority (SAMA), KSA bank loans sanctioned to the public and private sectors increased 3.0% by the end of June 2019 to about SAR 1.51tn as against SAR 1.47tn in the previous year. (Source: Argaam)
- Integrated energy services provider, National Energy Services Reunited Corp. (NESR) awarded contracts worth up to SAR 2.5bn (USD 660.0mn) in Saudi Arabia. The contracts were extended for coiled tubing and N2, stimulation services and cementing services for a period of five years with possible extensions of up to two years with the National Petroleum Technology Company, a subsidiary of NESR (Source: Argaam)

Major Corporate News

Earnings update (Net Profit) (SAR mn)

| Company | Q2-19 | Q2-18 | Y/Y % | Q1-19 | Q/Q % |
|----------------------------|---------|--------|--------|--------|--------|
| Saudi Steel Pipe Co. | (10.2) | (36.8) | N.M. | 0.3 | N.M. |
| National Medical Care Co. | 13.8 | 20.3 | (31.8) | 30.0 | (53.9) |
| Umm Al-Qura Cement Co. | 12.3 | 0.2 | N.M. | 21.5 | (42.9) |
| Arab National Bank | 894.2 | 747.2 | 19.7 | 779.0 | 14.8 |
| Middle East Paper Co. | (4.0) | 28.9 | N.M. | 5.8 | N.M. |
| Saudi Arabian Amiantit Co. | (262.0) | (53.7) | N.M. | (41.3) | N.M. |
| Al-Babtain Power | 20.8 | 20.5 | 1.5 | 19.8 | 5.1 |
| Qassim Cement | 70.5 | 18.4 | 283.4 | 56.0 | 25.8 |
| Leejam Sports | 49.6 | 39.8 | 24.7 | 39.1 | 25.6 |
| Alahli Takaful | 1.5 | 5.6 | (73.3) | 2.1 | (30.1) |
| Alinma Tokio Marine | (10.7) | (9.2) | N.M. | (7.2) | N.M. |
| Alinma Bank | 676 | 606 | 11.5 | 638 | 6.0 |
| Abdullah Al Othaim | 58.7 | 74.1 | (20.8) | 68.3 | (14.0) |
| AXA Cooperative Insurance | 30.5 | 24.1 | 26.4 | 26.8 | 13.6 |
| Saudi Arabian Insurance | 4.0 | 0.4 | 874.0 | 3.0 | 34.2 |
| Arabian Cement Co | 37.3 | (50.9) | N.M. | 37.1 | 0.5 |

Market Analysis

- The Saudi Stock Exchange decreased 0.8% to 8,666.4 on Thursday. The value traded stood at SAR 2.7bn (up 1.5% over previous day), while the advance-decline ratio stood at 38/137. The parallel market index decreased 0.9% to 3,775.7 points. The value traded stood at SAR 1.7mn (up 25.1% over previous day). Most sectors in the main market ended in the red. Telecom and Capital Goods (up 0.3% and 0.1%, respectively) advanced the most; Media and Consumer Services (down 1.9% and 1.3%, respectively) led the laggards.

Regional Markets

| Market | Close | Daily Change % | MTD % | YTD % |
|-----------------|--------|----------------|-------|-------|
| Dubai (DFM) | 2,900 | -0.6 | -0.6 | 14.7 |
| Abu Dhabi (ADX) | 5,230 | -1.6 | -1.6 | 6.4 |
| Kuwait (KSE) | 4,892 | 0.2 | 0.2 | 3.2 |
| Qatar (QE) | 10,398 | -1.0 | -1.0 | 1.0 |
| Oman (MSM) | 3,777 | 0.4 | 0.4 | -12.6 |
| Bahrain (BSE) | 1,550 | 0.1 | 0.1 | 15.9 |
| Egypt (EGX30) | 13,526 | 1.0 | 1.0 | 3.8 |

International Markets

| Index | Close | Daily Change % | MTD % | YTD % | P/E |
|--------------------------|--------|----------------|-------|-------|------|
| Dow Jones | 26,485 | -0.4 | -1.4 | 13.5 | 18.6 |
| Nasdaq | 7,693 | -1.4 | -2.0 | 21.5 | 23.9 |
| S&P 500 | 2,932 | -0.7 | -1.6 | 17.0 | 20.2 |
| FTSE 100 | 7,407 | -2.3 | -2.4 | 10.1 | 14.5 |
| Germany DAX 30 | 11,872 | -3.1 | -2.6 | 12.4 | 16.1 |
| France CAC 40 | 5,359 | -3.6 | -2.9 | 13.3 | 16.8 |
| Japan Nikkei 225 | 21,087 | -2.1 | -2.0 | 5.4 | 15.8 |
| Hong Kong Hang Seng | 26,919 | -2.3 | -3.1 | 4.2 | 10.8 |
| China Shanghai Composite | 2,868 | -1.4 | -2.2 | 15.0 | 12.0 |
| Australia ASX 200 | 6,769 | -0.3 | -0.6 | 19.9 | 17.5 |
| India Sensex | 37,118 | 0.3 | -1.0 | 2.9 | 22.3 |

Commodity Markets

| Commodity | Price | Daily Change % | MTD % | YTD % |
|---------------------------|-------|----------------|-------|-------|
| Arab Light Crude (\$/bbl) | 63.6 | -3.8 | -4.4 | 17.3 |
| Brent Crude (\$/bbl) | 61.9 | 2.3 | -5.0 | 15.0 |
| Texas crude (\$/bbl) | 55.7 | 3.8 | -4.9 | 23.3 |
| Natural Gas (\$/mmbtu) | 2.12 | -3.7 | -5.0 | -27.9 |
| Gold (\$/oz) | 1,440 | -0.3 | 1.9 | 12.3 |
| Silver (\$/oz) | 16.2 | -0.7 | -0.3 | 4.7 |
| Steel (\$/ton) | 602 | 0.0 | -0.7 | -16.5 |
| Iron Ore (CNY/MT) | 933 | -3.0 | -4.0 | 72.6 |
| Wheat (\$/bu) | 491 | 3.2 | 0.7 | -2.5 |
| Corn (\$/bu) | 400 | 1.7 | -0.2 | 6.5 |
| Sugar (\$/lb) | 12.0 | -0.8 | -1.6 | -0.1 |
| SMP* (EUR/MT) | 2,160 | 0.0 | 3.3 | 19.3 |

*SMP: Skimmed Milk Powder

Interbank Rates

| Region | Rate* | Daily Change (bps) | MTD (bps) | YTD (bps) |
|-----------------------|-------|--------------------|-----------|-----------|
| USD LIBOR | 2.239 | -4.7 | -2.6 | -56.8 |
| Saudi Arabia (SAIBOR) | 2.594 | -3.3 | -3.3 | -38.1 |
| UAE (EIBOR) | 2.592 | 1.7 | 1.7 | -24.5 |
| Kuwait (KIBOR) | NA | NA | NA | NA |
| Qatar (QIBOR) | 2.763 | 0.0 | 0.0 | -14.3 |
| Bahrain (BHIBOR) | 3.067 | -8.3 | -8.3 | -88.3 |

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

Data Sources: Tadawul, Bloomberg, Reuters

Updated as of August 04, 2019

Regional and International Markets

- Among other regional markets, Dubai and Abu Dhabi decreased 0.6% and 1.6%, respectively; while Kuwait, Oman, Bahrain and Egypt increased 0.2%, 0.4%, 0.1% and 1.0%, respectively, while Qatar decreased 1.0%.
- According to the Baker-Hughes Rig Count, rig count in the North America increased to 1,079 in the week ended August 2 from 1,073 earlier. Rig count in the US fell to 942 from 946; while rig count in Canada rose to 137 from 127 in the prior week. In the Gulf of Mexico, rig count fell to 22 from 23. (Source: Econoday)
- The US nonfarm payroll increased 164,000 M/M in July (consensus: 151,000) compared with 193,000 in June. The unemployment rate level remains stable at 3.7% (consensus: 3.6%). The private payroll increased 148,000 M/M in July (consensus: 160,000) compared with 179,000 in the prior month. (Source: Econoday)
- Oil prices rose 2.3% on Friday, as US-China trade war concerns were softened after Trump reportedly said that proposed tariffs on China could be delayed if Beijing "takes positive action".
- Gold prices fell 0.3% on Friday, despite U.S. President Donald Trump's plan to implement new tariffs on Chinese goods next month worsened tensions between the two nations.

Forex / Currency

| Currency | Close | Daily Change % | MTD % | YTD % |
|----------------|-------|----------------|-------|-------|
| Dollar Index | 98.1 | -0.3 | -0.4 | 2.0 |
| Euro | 1.11 | 0.2 | 0.3 | -3.2 |
| Japanese Yen | 106.6 | -0.7 | -2.0 | -2.7 |
| Sterling Pound | 1.22 | 0.2 | 0.0 | -4.7 |
| Chinese Yuan | 6.94 | 0.6 | 0.8 | 0.9 |
| Indian Rupee | 69.7 | 1.0 | 1.2 | 0.2 |
| 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 | 0.4 |
| Omani Rial | 0.38 | 0.0 | 0.0 | 0.0 |
| Bahraini Dinar | 0.38 | 0.0 | 0.0 | 0.0 |
| Egyptian Pound | 16.53 | 0.0 | 0.2 | -7.4 |

Corporate Calendar

| Date | Company | Event |
|----------------------|----------------|----------------------------|
| 04 th Aug | Atheeb Telecom | OGM |
| 05 th Aug | ASLAK | Cash Dividend Distribution |
| 05 th Aug | HB | EGM |
| 05 th Aug | Al Ahlia | EGM |
| 07 th Aug | Mulkia - REIT | Cash Dividend Distribution |
| 08 th Aug | Albilad | Cash Dividend Distribution |

*EGM: Extra Ordinary Meeting

*OGM: Ordinary General Meeting

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