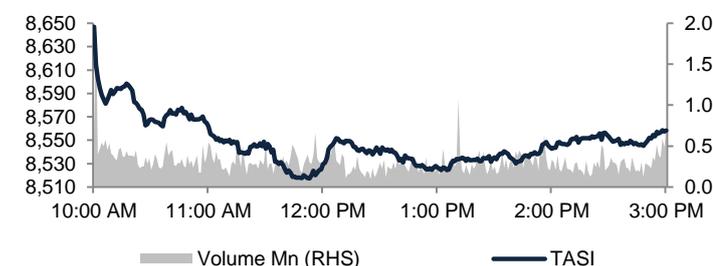


## Saudi Stock Exchange

Index	Closing	High	Low	Daily Change %	YTD %
TASI	8,557	8,621	8,515	(1.3)	9.3
NomuC	3,767	3,796	3,767	(0.2)	35.6

## TASI movement during session



Index	Close	Daily Change %	% YTD	PE (TTM)
Energy	4,473	(0.2)	(7.8)	17.0
Materials	5,304	(1.4)	1.0	16.4
Capital Goods	3,824	(1.3)	(2.0)	-17.0
Commercial Service	4,430	(1.2)	7.1	18.8
Transportation	3,854	(0.2)	10.8	22.8
Consumer Durables	3,492	0.0	(4.7)	-84.2
Consumer Services	3,547	0.5	20.4	306.6
Media	10,960	3.3	7.7	62.1
Retailing	7,406	(0.5)	7.9	34.7
Food & Staples	6,480	(4.4)	9.0	25.6
Food & Beverages	4,177	(0.0)	7.4	62.5
Healthcare	3,835	0.7	2.1	20.1
Pharma & Bio Tech	3,410	(0.2)	(12.1)	23.8
Banks	8,315	(1.7)	15.3	14.9
Diversified Financials	3,343	(0.1)	(3.9)	-26.8
Insurance	4,346	(1.0)	4.1	82.4
Telecom	6,803	(0.6)	25.8	35.4
Utilities	4,218	(1.0)	25.2	218.7
REITs	3,850	(0.2)	6.3	16.9
Real Estate	3,160	(0.8)	(2.0)	22.9
Software & Services	6,200	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)
8,685	8,759	8,867	2.54

## Market Statistics

	Value Traded (SAR bn)	Volumes (mn shares)	No. of Trades ('000 shares)
Current Week	2.5	95.6	98.4
Previous week	12.8	489.3	575.8

## Top Gainers

Company	Price	Change%
SASCO	16.92	3.9
SRMG	91.80	3.7
LAZURDE	17.18	3.0
ALDREES	40.60	2.9
MOUWASAT	88.00	2.3

## Top Losers

Company	Price	Change%
MEPCO	14.20	-7.0
AMIAANTIT	5.60	-5.4
A.OTHAIM MARKET	80.90	-4.9
BSFR	38.85	-3.7
SAMBA	30.15	-3.7

## Top Weighted Companies

Company	Price	Change%
Al Rajhi	66.90	-1.0
NCB	53.30	-2.9
SABIC	104.20	-2.1
STC	107.80	-0.7
Riyad	25.55	-2.5

## Major Economic News

- According to the data published by the General Authority for Statistics (GASTAT), KSA's oil exports tumbled 5.3% Y/Y to about SAR 70.4bn during May 2019, whereas, the same increased by around SAR 1.09bn M/M. Oil exports contributed for 80.0% of total exports for the month, which reached SAR 88.1bn. (Source: Argaam)
- The UAE's financial intelligence unit has inked a contract with KSA's financial intelligence unit, intending to strengthen the cooperation between the two agencies. The partnership will include development of shared network platforms, allowing improved knowledge sharing between the two agencies. (Source: Argaam)

## Major Corporate News

- Fawaz Abdulaziz Al Hokair & Co. has inked a purchase agreement to acquire 100.0% of the share capital of Innovative Union Company, owned by Food and Entertainment Company Ltd. for a price of SAR 340.0mn. Innovative Union Company presently operates 10 brands and more than 200 branches across KSA. (Source: Tadawul)

## Earnings update (Net Profit) (SAR mn)

Company	Q2-19	Q2-18	Y/Y %	Q1-19	Q/Q %
Al-Ahsa Development Co.	3.0	1.5	101.0	2.4	24.3
National Metal Mfg	(4.1)	3.8	N.M.	(0.2)	N.M.
Arab Sea Info. System	3.0	1.0	200.4	0.1	2279.1
Hail Cement Co.	(1.9)	(18.0)	N.M.	22.5	N.M.
Fitaihi Holding Group	7.5	13.6	(45.3)	5.6	34.1
Banque Saudi Fransi	804.4	841.0	(4.4)	917.0	(12.3)
Al Moammar Info.	13.0	13.0	0.6	11.7	11.3
MetLife AIG ANB	0.6	(1.3)	N.M.	(7.1)	N.M.
Walaa Insurance	(15.8)	34.3	N.M.	15.3	N.M.
Medgulf Insurance	4.1	(8.6)	N.M.	7.0	(41.5)
Seera Group Holding	66.0	103.0	(35.9)	49.0	34.7
Sadara Basic Services	(1137.7)	(646.3)	N.M.	(1254.3)	N.M.
City Cement	32.3	9.9	226.3	41.4	(22.1)
Arabian Shield Insurance	3.7	2.9	29.4	0.7	420.6

## Market Analysis

- The Saudi Stock Exchange decreased 1.3% to 8,557.1 on Sunday. The value traded stood at SAR 2.5bn (down 4.1% over previous day), while the advance-decline ratio stood at 63/129. The parallel market index decreased 0.2% to 3,766.8 points. The value traded stood at SAR 0.8mn (down 54.5% over previous day). Most sectors in the main market ended in the red. Media and Software & Services (up 3.3% and 0.9%, respectively) advanced the most; Food & Staples and Banks (down 4.4% and 1.7%, respectively) led the laggards.

## Regional Markets

Market	Close	Daily Change %	MTD %	YTD %
Dubai (DFM)	2,858	-1.5	-2.1	13.0
Abu Dhabi (ADX)	5,180	-1.0	-2.6	5.4
Kuwait (KSE)	4,887	-0.1	0.1	3.1
Qatar (QE)	10,356	-0.4	-1.4	0.6
Oman (MSM)	3,780	0.1	0.5	-12.6
Bahrain (BSE)	1,549	-0.1	0.1	15.8
Egypt (EGX30)	13,616	0.7	1.7	4.5

## International Markets

Index	Close	Daily Change %	MTD %	YTD %	P/E
Dow Jones	26,485	0.0	-1.4	13.5	18.6
Nasdaq	7,693	0.0	-2.0	21.5	23.9
S&P 500	2,932	0.0	-1.6	17.0	20.2
FTSE 100	7,407	0.0	-2.4	10.1	14.5
Germany DAX 30	11,872	0.0	-2.6	12.4	16.1
France CAC 40	5,359	0.0	-2.9	13.3	16.8
Japan Nikkei 225	21,087	0.0	-2.0	5.4	15.8
Hong Kong Hang Seng	26,919	0.0	-3.1	4.2	10.8
China Shanghai Composite	2,868	0.0	-2.2	15.0	12.0
Australia ASX 200	6,769	0.0	-0.6	19.9	17.5
India Sensex	37,118	0.0	-1.0	2.9	22.3

## Commodity Markets

Commodity	Price	Daily Change %	MTD %	YTD %
Arab Light Crude (\$/bbl)	63.6	0.0	-4.4	17.3
Brent Crude (\$/bbl)	61.9	0.0	-5.0	15.0
Texas crude (\$/bbl)	55.7	0.0	-4.9	23.3
Natural Gas (\$/mmbtu)	2.12	0.0	-5.0	-27.9
Gold (\$/oz)	1,440	0.0	1.9	12.3
Silver (\$/oz)	16.2	0.0	-0.3	4.7
Steel (\$/ton)	602	0.0	-0.7	-16.5
Iron Ore (CNY/MT)	933	0.0	-4.0	72.6
Wheat (\$/bu)	491	0.0	0.7	-2.5
Corn (\$/bu)	400	0.0	-0.2	6.5
Sugar (\$/lb)	12.0	0.0	-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	0.0	-2.6	-56.8
Saudi Arabia (SAIBOR)	2.571	-2.3	-5.6	-40.4
UAE (EIBOR)	2.485	-10.7	-9.0	-35.2
Kuwait (KIBOR)	NA	NA	NA	NA
Qatar (QIBOR)	2.800	3.7	3.7	-10.6
Bahrain (BHIBOR)	3.067	0.0	-8.3	-88.3

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

Data Sources: Tadawul, Bloomberg, Reuters

Updated as of August 05, 2019

## Regional and International Markets

- Among other regional markets, Dubai and Abu Dhabi decreased 1.5% and 1.0%, respectively. Kuwait, Qatar and Bahrain decreased 0.1%, 0.4% and 0.1%, respectively, while Oman and Egypt increased 0.1% and 0.7%, respectively.
- US Consumer sentiment index level remained unchanged at 98.4 (consensus: 98.4). The current conditions component is stable at 110.7 and has remained steady over the last few months. Inflation expectations are mixed- up 2 tenths for the year-ahead outlook and back in trend at 2.5% but down 1 tenth to 2.6% for the 5-year outlook. (Source: Econoday)
- The US factory orders rose 0.6% (consensus: 0.8%) in June, compared with a fall of 1.3% in the prior month. Orders for nondurable goods fell 0.5% in June following a 0.3% fall in May, by the effects of lower oil as well as coal prices. Inventories rose 0.2% for a third straight month to drag the inventory-to-shipment ratio down to 1.37 from 1.38. (Source: Econoday)
- The US motor vehicle sales fell to 16.8mn (consensus: 16.9mn) in July from 17.1mn in the prior month. The domestic vehicle sales fell to 13.0mn in July as against 13.4mn in June. Auto sales have shown growth in the last two retail sales reports, posting consecutive 0.7% monthly gains. (Source: Econoday)

## Forex / Currency

Currency	Close	Daily Change %	MTD %	YTD %
Dollar Index	98.1	0.0	-0.4	2.0
Euro	1.11	0.0	0.3	-3.2
Japanese Yen	106.6	0.0	-2.0	-2.7
Sterling Pound	1.22	0.0	0.0	-4.7
Chinese Yuan	6.94	0.0	0.8	0.9
Indian Rupee	69.7	0.0	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
05 <sup>th</sup> Aug	ASLAK	Cash Dividend Distribution
05 <sup>th</sup> Aug	HB	EGM
05 <sup>th</sup> Aug	Al Ahlia	EGM
07 <sup>th</sup> Aug	Mulkia - REIT	Cash Dividend Distribution
08 <sup>th</sup> Aug	Albilad	Cash Dividend Distribution
08 <sup>th</sup> Aug	Extra	Cash Dividend Distribution

\*EGM: Extra Ordinary Meeting

\*OGM: Ordinary General Meeting

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