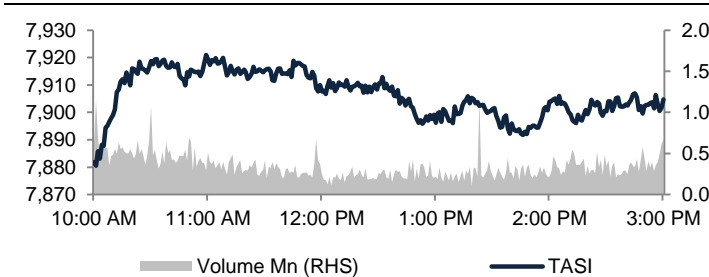


## Saudi Stock Exchange

Index	Closing	High	Low	Daily Change %	YTD %
TASI	7,922	7,922	7,879	0.6	1.2
NomuC	6,848	6,877	6,075	15.1	146.5

## TASI movement during session



Index	Close	Daily Change %	% YTD	PE (TTM)
Energy	5,314	0.3	9.6	20.2
Materials	4,874	0.8	(7.2)	15.1
Capital Goods	3,849	0.0	(1.3)	-17.1
Commercial Service	4,335	0.1	4.8	18.4
Transportation	3,957	(0.2)	13.8	23.4
Consumer Durables	3,229	0.5	(11.9)	-77.9
Consumer Services	3,478	0.0	18.0	300.6
Media	8,320	(0.1)	(18.3)	47.1
Retailing	7,404	0.2	7.8	34.7
Food & Staples	6,187	1.4	4.1	24.5
Food & Beverages	4,094	0.2	5.3	61.3
Healthcare	3,549	(0.2)	(5.5)	18.6
Pharma & Bio Tech	3,430	0.2	(11.6)	23.9
Banks	7,517	0.8	4.2	13.5
Diversified Financials	3,123	0.0	(10.2)	-25.1
Insurance	4,254	1.0	1.9	80.7
Telecom	6,049	0.1	11.9	31.5
Utilities	4,460	(0.4)	32.4	231.2
REITs	3,812	0.0	5.2	16.7
Real Estate	2,987	0.1	(7.4)	21.6
Software & Services	5,350	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)
7,825	7,760	7,757	2.48

## Market Statistics

	Value Traded (SAR bn)	Volumes (mn shares)	No. of Trades ('000)
Current Week	5.3	213.0	205.8
Previous week	12.0	491.4	516.7

## Top Gainers

Company	Price	Change%
ABO MOATI	23.98	10.0
THOB ALASEEL	50.80	10.0
AMIAANTIT	15.50	9.9
ALKATHIRI	133.80	9.9
TADCO	7.51	5.0

## Top Losers

Company	Price	Change%
ALBABBAIN	24.72	-4.0
ALSAGR INSURANCE	9.10	-3.1
ALUJAIN	20.20	-2.6
ALAHLIA	11.32	-2.4
EPCCO	32.55	-2.3

## Top Weighted Companies

Company	Price	Change%
Al Rajhi	62.90	0.8
NCB	45.10	0.0
SABIC	93.00	1.6
STC	96.00	0.1
Riyad	21.58	0.4

## Major Economic News

- The real estate market in Saudi Arabia has seen major improvement driven by increased trading volumes, CNBC Arabia reported, citing Dar Al-Arkan Real Estate Development Co. Chairman, Yousef Al Shelash. He added that the industry received a boost from different programs affiliated with the Ministry of Housing, which paved the way for Saudis to pump funds into the market. (Source: Argaam)

## Major Corporate News

- Saudi Paper Manufacturing Co. (SPM) cut its accumulated losses to SAR 7.2 million, or 7.84% of its capital as of Nov. 4, 2019, the company said in a statement to Tadawul on Tuesday. (Source: Argaam)
- Al-Babbain Power and Telecommunication Co.'s board of directors announced a 5 percent cash dividend for the first nine months of 2019, at SAR 0.5 per share, amounting to SAR 21.3 million. (Source: Argaam)
- Saudi Arabian Amiantit Co. said its accumulated losses as of Sept. 30, 2019 reached SAR 5 million, representing 1.4% of capital, the company said in a bourse statement. This came after the company's capital reduction, the statement added. (Source: Argaam)
- The Board of Directors of Abdullah Al Othaim Markets Company decided at its meeting on Monday to distribute interim cash dividends to shareholders of 15% of the capital (equivalent to SAR 1.5 per share) for the nine months of 2019. (Source: Argaam)

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

Company	Q3-19	Q3-18	Y/Y %	Q2-19	Q/Q %
Tihama Advertising	(8.7)	0.1	N.M.	1.4	N.M.
Fawaz Abdulaziz Alhokair	(26.7)	8.9	N.M.	224	N.M.

## Market Analysis

- The Saudi Stock Exchange increased 0.6% to 7,922.4 on Monday. The value traded stood at SAR 2.7bn (up 4.3% over previous day), while the advance-decline ratio stood at 102/73. The parallel market index increased 15.1% to 6,848.0 points. The value traded stood at SAR 143.4mn (up 5.8% over previous day). Most sectors in the main market ended in the green. Food & Staples and Insurance (up 1.4% and 1.0%, respectively) advanced the most; Utilities and Healthcare (down 0.4% and 0.2%, respectively) led the laggards.

## Regional Markets

Market	Close	Daily Change %	MTD %	YTD %
Dubai (DFM)	2,674	0.5	-2.7	5.7
Abu Dhabi (ADX)	5,088	-0.1	-0.4	3.5
Kuwait (KSE)	4,743	-0.1	-0.3	0.1
Qatar (QE)	10,304	0.4	1.1	0.0
Oman (MSM)	4,072	0.8	1.8	-5.8
Bahrain (BSE)	1,516	-0.2	-0.5	13.4
Egypt (EGX30)	14,770	-0.2	1.5	13.3

## International Markets

Index	Close	Daily Change %	MTD %	YTD %	P/E
Dow Jones	27,691	0.0	2.4	18.7	20.1
Nasdaq	8,242	-0.2	2.0	30.2	26.5
S&P 500	3,087	-0.2	1.6	23.1	21.9
FTSE 100	7,329	-0.4	1.1	8.9	15.3
Germany DAX 30	13,198	-0.2	2.6	25.0	17.9
France CAC 40	5,894	0.1	2.9	24.6	19.1
Japan Nikkei 225	23,332	-0.3	1.8	16.6	18.3
Hong Kong Hang Seng	26,927	-2.6	0.1	4.2	10.7
China Shanghai Composite	2,910	-1.8	-0.7	16.7	11.7
Australia ASX 200	6,773	0.7	1.6	19.9	17.6
India Sensex	40,345	0.1	0.5	11.9	21.9

## Commodity Markets

Commodity	Price	Daily Change %	MTD %	YTD %
Arab Light Crude (\$/bbl)	64.6	-0.9	3.5	19.1
Brent Crude (\$/bbl)	62.2	-0.5	3.2	15.6
Texas crude (\$/bbl)	56.6	-0.7	4.8	25.4
Natural Gas (\$/mmbtu)	2.64	-5.4	0.2	-10.3
Gold (\$/oz)	1,456	-0.2	-3.8	13.5
Silver (\$/oz)	16.9	0.4	-7.0	8.9
Steel (\$/ton)	492	0.0	-1.2	-31.8
Iron Ore (CNY/MT)	676	0.0	0.3	25.1
Wheat (\$/bu)	506	-0.9	-0.6	0.5
Corn (\$/bu)	373	-1.1	-4.3	-0.5
Sugar (\$/lb)	12.6	0.0	0.7	4.5
SMP* (EUR/MT)	2,525	0.0	3.6	39.5

\*SMP: Skimmed Milk Powder

## Interbank Rates

Region	Rate*	Daily Change (bps)	MTD (bps)	YTD (bps)
USD LIBOR	1.901	0.0	-0.2	-90.7
Saudi Arabia (SAIBOR)	2.229	0.0	-0.7	-74.6
UAE (EIBOR)	2.186	-0.4	10.8	-65.2
Kuwait (KIBOR)	NA	NA	NA	NA
Qatar (QIBOR)	2.275	-7.5	-31.6	-63.1
Bahrain (BHIBOR)	2.783	0.0	-3.3	-116.7

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

Data Sources: Tadawul, Bloomberg, Reuters

Updated as of November 12, 2019

## Regional and International Markets

- Among other regional markets, Dubai increased 0.5%, while Abu Dhabi decreased 0.1%. Kuwait, Bahrain and Egypt decreased 0.1%, 0.2% and 0.2%, respectively, while Qatar and Oman increased 0.4% and 0.8%, respectively.
- UK GDP contracted 0.1% M/M in September (in line with the consensus) compared with a fall of 0.2% in August. The 3-month change in GDP was 0.3% in September (consensus: 0.4%) against 0.2% in prior month. (Source: Econoday)
- UK industrial production fell 0.3% M/M in September (consensus: -0.2%) compared with -0.7% in August. On a Y/Y basis, it declined 1.4% in September (consensus: -1.3%) against -1.8% in August. The manufacturing output decreased 0.4% M/M in September (consensus: 0.3%) vis-a-vis -0.7% in August. On a Y/Y basis, it fell 1.8% in October (consensus: -1.6%) against -1.6% in October. (Source: Econoday)
- Oil prices fell 0.5% on Monday, amid renewed questions over the prospect of tariff rollbacks in the protracted US-China trade war, while concerns about excessive supply also weighed on sentiment.
- Gold prices fell 0.2% on Monday, raising doubts on the near-term bull case for the yellow metal, which is now at three-month lows..

## Forex / Currency

Currency	Close	Daily Change %	MTD %	YTD %
Dollar Index	98.2	-0.2	0.9	2.1
Euro	1.10	0.1	-1.1	-3.8
Japanese Yen	109.0	-0.2	0.9	-0.5
Sterling Pound	1.29	0.6	-0.7	0.7
Chinese Yuan	7.01	0.2	-0.4	2.0
Indian Rupee	71.6	0.3	0.8	2.9
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	0.1
Omani Rial	0.38	0.0	-0.1	0.0
Bahraini Dinar	0.38	0.0	0.0	0.1
Egyptian Pound	16.1	0.0	0.1	-9.9

## Corporate Calendar

Date	Company	Event
12 <sup>th</sup> Nov	SCC	EGM
12 <sup>th</sup> Nov	Bupa Arabia	EGM
19 <sup>th</sup> Nov	STC	Cash Dividend Distribution
21 <sup>st</sup> Nov	Zahrat Al Waha	OGM
27 <sup>th</sup> Nov	Jarir	Cash Dividend Distribution
27 <sup>th</sup> Nov	Buruj	OGM

\*EGM: Extra Ordinary Meeting

\*OGM: Ordinary General Meeting

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