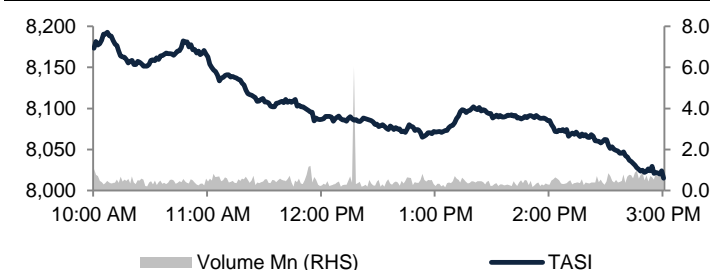


Saudi Stock Exchange

Index	Closing	High	Low	Daily Change %	YTD %
TASI	8,020	8,193	8,014	(1.9)	2.5
NomuC	3,868	3,868	3,830	1.0	39.2

TASI movement during session



Index	Close	Daily Change %	% YTD	PE (TTM)
Energy	4,638	1.1	(4.4)	17.6
Materials	5,039	(1.2)	(4.0)	15.6
Capital Goods	3,816	0.2	(2.2)	-17.0
Commercial Service	4,364	(1.2)	5.5	18.6
Transportation	3,715	0.2	6.9	22.0
Consumer Durables	3,516	(0.3)	(4.0)	-84.8
Consumer Services	3,357	(1.8)	13.9	290.1
Media	10,749	(2.7)	5.6	60.9
Retailing	7,097	(2.2)	3.4	33.3
Food & Staples	6,275	(2.4)	5.6	24.8
Food & Beverages	4,084	(1.8)	5.0	61.1
Healthcare	3,771	(1.7)	0.4	19.7
Pharma & Bio Tech	3,391	(1.2)	(12.6)	23.6
Banks	7,562	(2.6)	4.8	13.5
Diversified Financials	3,300	(0.9)	(5.1)	-26.5
Insurance	4,203	(1.9)	0.7	79.7
Telecom	6,330	(1.5)	17.1	33.0
Utilities	4,431	(2.1)	31.5	229.7
REITs	3,787	(0.3)	4.5	16.6
Real Estate	3,070	(0.7)	(4.8)	22.2
Software & Services	5,843	(1.5)	N.A.	N.A.

Average Index Value

Average 5 days	Average 10 days	Average 20 days	Average value traded for the month (bn)
8,195	8,361	8,490	4.92

Market Statistics

	Value Traded (SAR bn)	Volumes (mn shares)	No. of Trades ('000 shares)
Current Week	-	-	-
Previous week	43.2	1,305.6	807.7

Top Gainers

Company	Price	Change%
YSCC	21.40	4.5
ALDREES	45.10	4.2
SASCO	20.20	4.0
AMIANITIT	6.74	3.9
APC	10.84	3.2

Top Losers

Company	Price	Change%
SAIB	16.00	-4.8
MOUWASAT	85.00	-4.5
SAMBA	28.70	-4.3
FITNESS TIME	77.90	-3.7
ALALAMIYA	19.50	-3.6

Top Weighted Companies

Company	Price	Change%
Al Rajhi	60.50	-3.4
NCB	47.65	-1.5
SABIC	99.90	-0.7
STC	99.00	-1.4
Riyad	25.60	-0.8

Major Economic News

- According to the data published by the Saudi Arabian Monetary Authority (SAMA), mortgage loans offered to retail clients by banks in KSA reached an all-time high of SAR 7.2bn in July 2019, up 266.0% Y/Y in the number of agreements inked (15,961 agreements) and 189.0% Y/Y in terms of value. Mortgage lending increased about 65.0% M/M. (Source: Argaam)
- According to the data published by the General Authority for Statistics (GASTAT), KSA's trade balance surplus touched SAR 39.3bn in June, as against a surplus of SAR 57.8bn for the same month previous year. Trade balance surplus declined SAR 5.6bn in June as against the previous month. Total exports stood at SAR 77.1bn in June, implying a fall of 19.0% Y/Y, while imports increased 1.3% Y/Y to SAR 37.7bn. (Source: Argaam)
- According to the data issued by the Saudi Arabian Monetary Authority (SAMA), KSA banks posted a fall of 6% Y/Y in combined net profit to SAR 4.5bn in July 2019. The sector's total earnings grew by 2.0% Y/Y to SAR 29.3bn year to date. Banks' combined assets increased 6.0% Y/Y to SAR 2.5tn in July. (Source: Argaam)
- Assets owned by the Saudi Arabian Monetary Authority (SAMA) declined by SAR 29.5bn M/M to about SAR 1.9tn in July 2019. As against the same month previous year, assets increased SAR 12.6bn. SAMA's investments in foreign securities, which contributed 61.0% of its total assets, decreased to about SAR 1.191tn in July, as against 1.196tn in the previous year. (Source: Argaam)

Major Corporate News

- Bupa Arabia for Cooperative Insurance announced that its Board of Directors has approved appointment of Eng. Loay Hisham Nazer, as Chairman of the Board, Mr. David Martin Fletcher, as Vice-Chairman of the Board, and Mr. Tal Hisham Nazer, as Managing Director. (Source: Argaam)

Market Analysis

- The Saudi Stock Exchange decreased 1.9% to 8019.8 on Thursday. The value traded stood at SAR 4.0bn (down 12.9% over previous day), while the advance-decline ratio stood at 45/131. The parallel market index increased 1.0% to 3,868.0 points. The value traded stood at SAR 0.5mn (down 29.1% over previous day). Most sectors in the main market ended in the red. Energy and Transportation (up 1.1% and 0.2%, respectively) advanced the most; Media and Banks (down 2.7% and 2.6%, respectively) led the laggards.

Regional Markets

Market	Close	Daily Change %	MTD %	YTD %
Dubai (DFM)	2,759	0.0	-5.5	9.0
Abu Dhabi (ADX)	5,166	0.7	-2.9	5.1
Kuwait (KSE)	4,789	0.0	-1.9	1.1
Qatar (QE)	10,233	2.1	-2.6	-0.6
Oman (MSM)	4,005	0.8	6.5	-7.4
Bahrain (BSE)	1,533	-0.1	-0.9	14.6
Egypt (EGX30)	14,835	1.6	10.8	13.8

International Markets

Index	Close	Daily Change %	MTD %	YTD %	P/E
Dow Jones	26,403	0.2	-1.7	13.2	18.5
Nasdaq	7,691	-0.1	-2.0	21.5	24.3
S&P 500	2,926	0.1	-1.8	16.7	20.2
FTSE 100	7,207	0.3	-5.0	7.1	14.2
Germany DAX 30	11,939	0.8	-2.0	13.1	16.7
France CAC 40	5,480	0.6	-0.7	15.8	17.2
Japan Nikkei 225	20,704	1.2	-3.8	3.4	14.4
Hong Kong Hang Seng	25,725	0.1	-7.4	-0.5	10.6
China Shanghai Composite	2,886	-0.2	-1.6	15.7	11.9
Australia ASX 200	6,604	1.5	-3.1	17.0	17.1
India Sensex	37,333	0.7	-0.4	3.5	22.1

Commodity Markets

Commodity	Price	Daily Change %	MTD %	YTD %
Arab Light Crude (\$/bbl)	62.6	0.9	-6.1	15.4
Brent Crude (\$/bbl)	60.4	-1.1	-7.3	12.3
Texas crude (\$/bbl)	55.1	-2.8	-5.9	22.0
Natural Gas (\$/mmbtu)	2.29	-0.5	2.3	-22.3
Gold (\$/oz)	1,520	-0.5	7.5	18.5
Silver (\$/oz)	18.4	0.6	12.9	18.5
Steel (\$/ton)	560	1.1	-7.6	-22.3
Iron Ore (CNY/MT)	720	2.6	-26.0	33.1
Wheat (\$/bu)	451	-3.9	-7.4	-10.3
Corn (\$/bu)	358	-0.5	-10.6	-4.5
Sugar (\$/lb)	11.1	-0.6	-8.8	-7.4
SMP* (EUR/MT)	2,163	0.1	3.4	19.5

*SMP: Skimmed Milk Powder

Interbank Rates

Region	Rate*	Daily Change (bps)	MTD (bps)	YTD (bps)
USD LIBOR	2.132	0.0	-13.4	-67.6
Saudi Arabia (SAIBOR)	2.420	-0.1	-20.7	-55.5
UAE (EIBOR)	2.438	2.4	-13.7	-40.0
Kuwait (KIBOR)	NA	NA	NA	NA
Qatar (QIBOR)	2.747	1.6	-1.6	-15.9
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 September 01, 2019

Regional and International Markets

- Among other regional markets, Dubai remained flat, while Abu Dhabi increased 0.7%. Oman, Qatar and Egypt increased 0.8%, 2.1% and 1.6% respectively, while Bahrain decreased 0.1%. Meanwhile, Kuwait remained flat.
- According to the Baker-Hughes Rig Count, rig count in the North America decreased to 1,054 in the week ended August 30 from 1,055 earlier. Rig count in the US fell to 904 from 916, while rig count in the Canada rose to 150 from 139. In the Gulf of Mexico, rig count remained constant at 26. (Source: Econoday)
- US Consumer sentiment level fell to 89.8 (consensus: 92.3) in August, as compared 92.1 in the prior month. The expectations component declined over 10 points in the month to 79.9 with the current conditions component down over 5 points to 105.3. (Source: Econoday)
- Oil prices dropped 1.1% on Friday as the output from OPEC increased for the first time in FY19 and Russia's production missed its agreed production levels.
- Gold prices fell 0.5% on Friday after a modest increase from US inflation data failed to recover a rally driven by last week's escalations of the US-China trade war.

Forex / Currency

Currency	Close	Daily Change %	MTD %	YTD %
Dollar Index	98.9	0.4	0.4	2.9
Euro	1.10	-0.6	-0.8	-4.2
Japanese Yen	106.3	-0.2	-2.3	-3.0
Sterling Pound	1.22	-0.3	0.0	-4.7
Chinese Yuan	7.15	0.2	3.9	4.1
Indian Rupee	71.5	-0.3	3.8	2.7
UAE Dirham	3.67	0.0	0.0	0.0
Qatari Rial	3.64	0.0	0.0	0.0
Kuwaiti Dinar	0.30	-0.2	-0.3	0.0
Omani Rial	0.38	0.0	0.0	0.0
Bahraini Dinar	0.38	0.0	0.0	0.0
Egyptian Pound	16.50	0.0	0.0	-7.6

Corporate Calendar

Date	Company	Event
01 st Sep	QACCO	Cash Dividend Distribution
02 nd Sep	SABB	Cash Dividend Distribution
02 nd Sep	SGS	Cash Dividend Distribution
04 th Sep	Jarir	Cash Dividend Distribution
08 th Sep	Tawuniya	EGM
08 th Sep	Amiantit	EGM

*EGM: Extra Ordinary Meeting

*OGM: Ordinary General Meeting

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