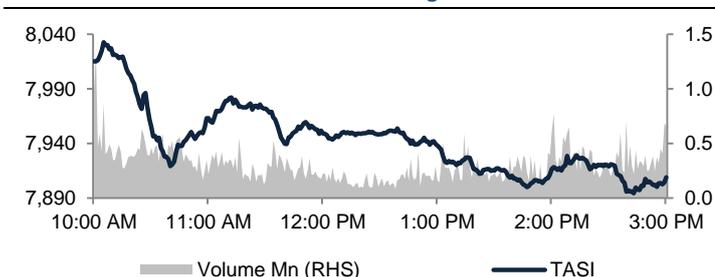


## Saudi Stock Exchange

Index	Closing	High	Low	Daily Change %	YTD %
TASI	7,912	8,033	7,893	(1.3)	1.1
NomuC	3,762	3,868	3,762	(2.7)	35.4

## TASI movement during session



Index	Close	Daily Change %	% YTD	PE (TTM)
Energy	4,672	0.7	(3.6)	17.7
Materials	5,023	(0.3)	(4.4)	15.6
Capital Goods	3,824	0.2	(2.0)	-17.0
Commercial Service	4,390	0.6	6.1	18.7
Transportation	3,738	0.6	7.5	22.1
Consumer Durables	3,509	(0.2)	(4.2)	-84.6
Consumer Services	3,341	(0.5)	13.4	288.8
Media	10,613	(1.3)	4.3	60.1
Retailing	7,068	(0.4)	2.9	33.1
Food & Staples	6,225	(0.8)	4.7	24.6
Food & Beverages	4,027	(1.4)	3.6	60.3
Healthcare	3,727	(1.2)	(0.8)	19.5
Pharma & Bio Tech	3,430	1.2	(11.6)	23.9
Banks	7,366	(2.6)	2.1	13.2
Diversified Financials	3,277	(0.7)	(5.8)	-26.3
Insurance	4,233	0.7	1.4	80.3
Telecom	6,329	(0.0)	17.1	33.0
Utilities	4,427	(0.1)	31.4	229.5
REITs	3,769	(0.5)	4.0	16.5
Real Estate	3,051	(0.6)	(5.4)	22.1
Software & Services	5,439	(0.8)	N.A.	N.A.

## Average Index Value

Average 5 days	Average 10 days	Average 20 days	Average value traded for the month (bn)
8,129	8,300	8,442	2.41

## Market Statistics

	Value Traded (SAR bn)	Volumes (mn shares)	No. of Trades ('000 shares)
Current Week	2.4	93.7	85.2
Previous week	43.2	1,305.6	807.7

## Top Gainers

Company	Price	Change%
AMIANIT	6.99	3.7
ALDREES	46.40	2.9
SVCP	45.20	2.8
ZAIN KSA	12.02	2.6
APC	11.08	2.2

## Top Losers

Company	Price	Change%
ALUJAIN	22.10	-3.8
BSFR	33.75	-3.6
NCB	46.00	-3.5
SABB	30.90	-3.4
ANB	22.86	-3.1

## Top Weighted Companies

Company	Price	Change%
Al Rajhi	58.90	-2.6
NCB	46.00	-3.5
SABIC	99.70	-0.2
STC	98.80	-0.2
Riyad	24.86	-2.9

## Major Economic News

- According to the data published by the Saudi Arabian Monetary Authority (SAMA), point-of-sale (POS) transactions in KSA surged 19.0% Y/Y to SAR 22.8bn in July. A total of 129.7mn transactions were processed through nearly 404,200 points-of-sales in shopping malls, retail stores, and pharmacies. Cash withdrawals fell 0.4% Y/Y to SAR 63.2bn through 182.2mn transactions processed across 18,800 ATMs in July. (Source: Argaam)
- According to the data published by the Saudi General Authority for Statistics (GASTAT), prices of 79 goods and services in KSA decreased Y/Y in July 2019, while prices of other 79 commodities increased. In addition, prices of 41 food products out of 91 increased Y/Y for the month, while the prices of the remaining number have declined. (Source: Argaam)
- According to the Saudi Arabian Monetary Authority (SAMA), KSA's foreign reserves grew by about SAR 25.0mn M/M to SAR 497.6bn in July 2019. Meanwhile, KSA's current account declined by SAR 35.8bn in July to about SAR 64.3bn, as against the previous month. (Source: Argaam)

## Major Corporate News

- According to Bloomberg, Etihad Etisalat Co. (Mobily) is in discussions with banks to refinance around SAR 8.0bn (USD 2.1bn) of debt to reduce borrowing costs. Mobily's net debts reached SAR 11.3bn by end of Q2-19 as against SAR 12.2bn during the same period last year. (Source: Bloomberg)
- Dallah Healthcare Company announces the signing of SAR 112.0mn long-term strategic partnership contract with Siemens Healthcare Limited operating and providing technical support for radiology sections in all hospitals that would be appointed to Dallah by private and public sector hospitals and its hospitals. (Source: Tadawul)

## Market Analysis

- The Saudi Stock Exchange decreased 1.3% to 7,912.3 on Sunday. The value traded stood at SAR 2.4bn (down 40.3% over previous day), while the advance-decline ratio stood at 58/121. The parallel market index increased 2.7% to 3,762.1 points. The value traded stood at SAR 0.7mn (up 28.7% over previous day). Most sectors in the main market ended in the green. Pharma & Bio Tech and Energy (up 1.2% and 0.7%, respectively) advanced the most; Banks and Food & Beverages (down 2.6% and 1.5%, respectively) led the laggards.

## Regional Markets

Market	Close	Daily Change %	MTD %	YTD %
Dubai (DFM)	2,758	0.0	0.0	9.0
Abu Dhabi (ADX)	5,121	-0.9	-0.9	4.2
Kuwait (KSE)	4,790	0.0	0.0	1.1
Qatar (QE)	10,254	0.2	0.2	-0.4
Oman (MSM)	4,005	0.0	0.0	-7.4
Bahrain (BSE)	1,533	0.0	0.0	14.6
Egypt (EGX30)	14,932	0.6	0.6	14.5

## International Markets

Index	Close	Daily Change %	MTD %	YTD %	P/E
Dow Jones	26,403	0.0	-1.7	13.2	18.5
Nasdaq	7,691	0.0	-2.0	21.5	24.3
S&P 500	2,926	0.0	-1.8	16.7	20.2
FTSE 100	7,207	0.0	-5.0	7.1	14.2
Germany DAX 30	11,939	0.0	-2.0	13.1	16.7
France CAC 40	5,480	0.0	-0.7	15.8	17.2
Japan Nikkei 225	20,704	0.0	-3.8	3.4	14.4
Hong Kong Hang Seng	25,725	0.0	-7.4	-0.5	10.6
China Shanghai Composite	2,886	0.0	-1.6	15.7	11.9
Australia ASX 200	6,604	0.0	-3.1	17.0	17.1
India Sensex	37,333	0.0	-0.4	3.5	22.1

## Commodity Markets

Commodity	Price	Daily Change %	MTD %	YTD %
Arab Light Crude (\$/bbl)	62.6	0.0	-6.1	15.4
Brent Crude (\$/bbl)	60.4	0.0	-7.3	12.3
Texas crude (\$/bbl)	55.1	0.0	-5.9	22.0
Natural Gas (\$/mmbtu)	2.29	0.0	2.3	-22.3
Gold (\$/oz)	1,520	0.0	7.5	18.5
Silver (\$/oz)	18.4	0.0	12.9	18.5
Steel (\$/ton)	560	0.0	-7.6	-22.3
Iron Ore (CNY/MT)	720	0.0	-26.0	33.1
Wheat (\$/bu)	451	0.0	-7.4	-10.3
Corn (\$/bu)	358	0.0	-10.6	-4.5
Sugar (\$/lb)	11.1	0.0	-8.8	-7.4
SMP* (EUR/MT)	2,163	0.0	3.4	19.5

\*SMP: Skimmed Milk Powder

## Interbank Rates

Region	Rate*	Daily Change (bps)	MTD (bps)	YTD (bps)
USD LIBOR	2.138	0.0	-12.8	-67.0
Saudi Arabia (SAIBOR)	2.414	-0.6	-0.6	-56.1
UAE (EIBOR)	2.347	-9.0	-9.0	-49.0
Kuwait (KIBOR)	NA	NA	NA	NA
Qatar (QIBOR)	2.729	-1.7	-1.7	-17.6
Bahrain (BHIBOR)	3.067	0.0	0.0	-88.3

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

Data Sources: Tadawul, Bloomberg, Reuters

Updated as of September 02, 2019

## Regional and International Markets

- Among other regional markets, Dubai remains unchanged, while Abu Dhabi decreased 0.9%. Qatar and Egypt increased 0.2% and 0.6%, respectively each, while Kuwait, Oman and Bahrain remained flat.
- Chicago's PMI business barometer Index level rose to 50.4 in August (consensus: 47.5) from 44.4 in July. A nearly 10 point improvement in new orders to 53.4 led the charge with backlog orders back over 50 and showing a build at 51.3 for the first time in four months. (Source: Econoday)
- US personal income rose 0.1% M/M in July (consensus: 0.3%), compared with 0.5% in June. Consumer spending increased 0.6% M/M in July (consensus: 0.5%), against 0.3% in the prior month. The PCE price index increased 0.2% M/M in July (consensus: 0.2%), against 0.1% in the prior month. The core PCE price index rose 0.2% M/M in July (consensus: 0.2%), against 0.2% in June. (Source: Econoday)
- The Eurozone's unemployment rate level remained unchanged at 7.5% (consensus: 7.5%) in July. Amongst the larger Eurozone states, the national unemployment rate decreased in Germany (3.0% after 3.1%) and Spain (13.9% after 14.0%) but was only flat in France (8.5%) and increased in Italy (9.9% after 9.8%). (Source: Econoday)

## Forex / Currency

Currency	Close	Daily Change %	MTD %	YTD %
Dollar Index	98.9	0.0	0.4	2.9
Euro	1.10	0.0	-0.8	-4.2
Japanese Yen	106.3	0.0	-2.3	-3.0
Sterling Pound	1.22	0.0	0.0	-4.7
Chinese Yuan	7.15	0.0	3.9	4.1
Indian Rupee	71.5	0.0	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
02 <sup>nd</sup> Sep	SABB	Cash Dividend Distribution
02 <sup>nd</sup> Sep	SGS	Cash Dividend Distribution
04 <sup>th</sup> Sep	Jarir	Cash Dividend Distribution
08 <sup>th</sup> Sep	Tawuniya	EGM
08 <sup>th</sup> Sep	Amiantit	EGM
08 <sup>th</sup> Sep	Wafrah	OGM

\*EGM: Extra Ordinary Meeting

\*OGM: Ordinary General Meeting

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