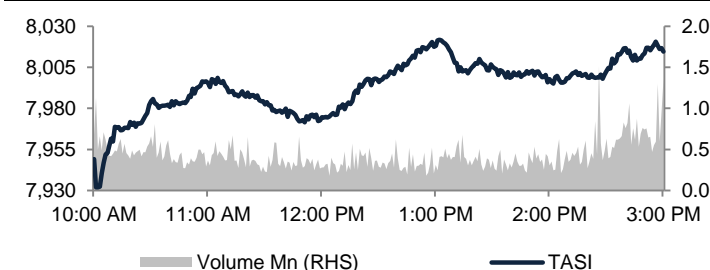


Saudi Stock Exchange

Index	Closing	High	Low	Daily Change %	YTD %
TASI	8,058	8,058	7,929	1.7	3.0
NomuC	3,766	3,766	3,699	0.8	35.6

TASI movement during session



Index	Close	Daily Change %	% YTD	PE (TTM)
Energy	4,747	(0.0)	(2.1)	18.0
Materials	5,092	1.1	(3.0)	15.8
Capital Goods	3,948	0.5	1.2	-17.6
Commercial Service	4,382	0.0	5.9	18.6
Transportation	3,822	0.8	9.9	22.6
Consumer Durables	3,551	(0.5)	(3.1)	-85.6
Consumer Services	3,397	0.9	15.2	293.6
Media	10,792	1.8	6.0	61.1
Retailing	7,232	1.9	5.3	33.9
Food & Staples	6,252	(0.1)	5.2	24.7
Food & Beverages	4,035	0.5	3.8	60.4
Healthcare	3,767	1.1	0.3	19.7
Pharma & Bio Tech	3,430	1.2	(11.6)	23.9
Banks	7,508	2.2	4.1	13.4
Diversified Financials	3,332	0.6	(4.2)	-26.7
Insurance	4,332	1.5	3.8	82.1
Telecom	6,605	2.8	22.2	34.4
Utilities	4,554	1.7	35.2	236.1
REITs	3,780	0.3	4.3	16.6
Real Estate	3,085	0.9	(4.4)	22.4
Software & Services	5,589	1.9	N.A.	N.A.

Average Index Value

Average 5 days	Average 10 days	Average 20 days	Average value traded for the month (bn)
7,977	8,129	8,330	2.97

Market Statistics

	Value Traded (SAR bn)	Volumes (mn shares)	No. of Trades ('000 shares)
Current Week	11.9	497.3	431.8
Previous week	43.2	1,305.6	807.7

Top Gainers

Company	Price	Change%
ALLIANZ SF	27.70	8.6
ATC	25.90	8.4
NCB	47.80	4.7
GULF GENERAL	12.42	4.4
TAPRCO	38.85	4.2

Top Losers

Company	Price	Change%
ALSORAYAI GROUP	41.00	-4.8
SASCO	20.64	-2.2
ALAHLIA	10.12	-2.1
AMIAITIT	7.48	-1.7
TADCO	8.02	-1.6

Top Weighted Companies

Company	Price	Change%
Al Rajhi	60.80	2.7
NCB	47.80	4.7
SABIC	100.80	1.1
STC	104.00	3.2
Riyad	24.50	1.2

Major Economic News

- According to the data published by the Saudi Arabian Monetary Authority (SAMA), KSA bank loans provided to the public and private sectors increased 3.0% by the end of July 2019 to about SAR 1.54tn as against SAR 1.49tn in the previous year. Private sector lending rose 3.0% Y/Y to SAR 1.48tn for the same month. (Source: Argaam)
- According to the data published by the Ministry of Environment, Water and Agriculture, KSA's drinking water consumption increased 8.0% Y/Y to 3.4bn cubic meters in 2018. Desalinated water contributed 63.0% (2.14bn cubic meters) of distributed water for the year, whereas, groundwater accounted for 37.0% or 1.26bn cubic meters. (Source: Argaam)
- According to a Russian news agency TASS, citing the Russian Ministry of Agriculture, Russian agricultural exports to KSA is estimated to be above USD 2.0bn by 2024. The Minister recommended a joint program on expansion of exports of Russian foods to KSA in order to reach the target of USD 2.0bn within the mentioned time frame. (Source: Argaam)
- KSA's King Salman was handed over the 55th annual report of the Saudi Arabian Monetary Authority (SAMA). According to the SAMA governor, KSA economy attained progress in different sectors in 2018 due to the KSA's balanced economic policies. He further added that reserved assets in the banking system rose 3.3% to SAR 1.9bn in H1-19 and adequacy ratio (Basel III) averaged 20.6% by end of Q2-19. (Source: Argaam)

Major Corporate News

- The Capital Market Authority (CMA) levied a penalty of SAR 20,000 on Halwani Bros for breach of the regulatory rules related to offering of securities and continuing obligations. The company did not publish its interim financial statements for Q1-19 within the specified period. Halwani Bros. Published its results on May 29, 2019. (Source: Argaam)

Market Analysis

- The Saudi Stock Exchange increased 1.7% to 8,058.4 on Wednesday. The value traded stood at SAR 3.4bn (up 16.0% over previous day), while the advance-decline ratio stood at 148/31. The parallel market index increased 0.9% to 3,765.9 points. The value traded stood at SAR 2.7mn (up 174.4% over previous day). Most sectors in the main market ended in the green. Telecom and Banks (up 2.8% and 2.2%, respectively) advanced the most; Consumer Durables and Food & Staples (down 0.5% and 0.1%, respectively) led the laggards.

Regional Markets

Market	Close	Daily Change %	MTD %	YTD %
Dubai (DFM)	2,880	0.1	4.4	13.8
Abu Dhabi (ADX)	5,125	0.4	-0.8	4.3
Kuwait (KSE)	4,780	-0.1	-0.2	0.9
Qatar (QE)	10,295	0.0	0.6	0.0
Oman (MSM)	4,012	-0.1	0.2	-7.2
Bahrain (BSE)	1,542	-0.1	0.6	15.3
Egypt (EGX30)	14,841	-1.1	0.0	13.9

International Markets

Index	Close	Daily Change %	MTD %	YTD %	P/E
Dow Jones	26,355	0.9	-0.2	13.0	18.5
Nasdaq	7,719	1.4	0.4	21.9	24.0
S&P 500	2,938	1.1	0.4	17.2	20.1
FTSE 100	7,311	0.6	1.4	8.7	14.5
Germany DAX 30	12,025	1.0	0.7	13.9	17.2
France CAC 40	5,532	1.2	0.9	16.9	17.8
Japan Nikkei 225	20,649	0.1	-0.3	3.2	14.4
Hong Kong Hang Seng	26,523	3.9	3.1	2.6	10.5
China Shanghai Composite	2,957	0.9	2.5	18.6	12.0
Australia ASX 200	6,553	-0.3	-0.8	16.1	16.7
India Sensex	36,725	0.4	-1.6	1.8	21.9

Commodity Markets

Commodity	Price	Daily Change %	MTD %	YTD %
Arab Light Crude (\$/bbl)	58.9	-0.1	-5.9	8.6
Brent Crude (\$/bbl)	60.7	4.2	0.4	12.8
Texas crude (\$/bbl)	56.2	4.3	2.1	24.5
Natural Gas (\$/mmbtu)	2.45	3.7	7.0	-16.8
Gold (\$/oz)	1,552	0.4	2.1	21.0
Silver (\$/oz)	19.6	1.8	6.6	26.4
Steel (\$/ton)	570	1.8	1.8	-20.9
Iron Ore (CNY/MT)	778	2.6	8.1	43.9
Wheat (\$/bu)	456	2.0	1.1	-9.3
Corn (\$/bu)	346	-1.1	-3.4	-7.7
Sugar (\$/lb)	11.0	-1.6	-1.2	-8.5
SMP* (EUR/MT)	2,093	-3.5	-3.2	15.6

*SMP: Skimmed Milk Powder

Interbank Rates

Region	Rate*	Daily Change (bps)	MTD (bps)	YTD (bps)
USD LIBOR	2.127	0.0	-1.1	-68.1
Saudi Arabia (SAIBOR)	2.403	-0.3	-1.7	-57.2
UAE (EIBOR)	2.418	4.0	-2.0	-42.0
Kuwait (KIBOR)	NA	NA	NA	NA
Qatar (QIBOR)	2.770	2.0	2.3	-13.6
Bahrain (BHIBOR)	3.033	0.0	-3.3	-91.7

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

Data Sources: Tadawul, Bloomberg, Reuters

Updated as of September 05, 2019

Regional and International Markets

- Among other regional markets, Dubai and Abu Dhabi increased 0.1% and 0.4%, respectively. Kuwait, Oman, Bahrain and Egypt decreased 0.1%, 0.1%, 0.1% and 1.1%, respectively. Meanwhile, Qatar remained flat.
- The US MBA Mortgage Composite Index fell 3.1% W/W in the week ended August 30 compared with a decline of 6.2% earlier; the Purchase Index rose 4.0% W/W against a drop of 4.0% in the prior week, and the Refinance Index declined 7.0% W/W compared with a fall of 8.0% earlier. (Source: Econoday)
- According to the US Redbook same store sales increased 6.5% Y/Y in the week ended August 31, compared with a rise of 5.7% in the prior week. This report has been indicating another robust quarter for consumer spending which in the Q2 dominated US growth statistics. (Source: Econoday)
- Oil prices surged 4.2% on Wednesday, breaking three days of losses, but gains were held in check by worries over the economic outcome from the extended trade war between the US and China.
- Gold prices remained near to recent highs on Wednesday rising 0.4%, denying giving up much ground despite a broad rally in risk assets around the globe.

Forex / Currency

Currency	Close	Daily Change %	MTD %	YTD %
Dollar Index	98.5	-0.6	-0.5	2.4
Euro	1.10	0.6	0.4	-3.8
Japanese Yen	106.4	0.4	0.1	-2.9
Sterling Pound	1.23	1.4	0.8	-4.0
Chinese Yuan	7.14	-0.5	-0.2	3.9
Indian Rupee	72.0	-0.3	0.7	3.5
UAE Dirham	3.67	0.0	0.0	0.0
Qatari Rial	3.64	0.0	0.0	0.0
Kuwaiti Dinar	0.30	-0.1	0.1	0.2
Omani Rial	0.38	0.0	0.0	0.0
Bahraini Dinar	0.38	0.0	0.0	0.1
Egyptian Pound	16.49	-0.1	-0.1	-7.7

Corporate Calendar

Date	Company	Event
08 th Sep	Tawuniya	EGM
08 th Sep	Amiantit	EGM
08 th Sep	Wafrah	OGM
11 th Sep	Arabian Shield	OGM
11 th Sep	SACO	Cash Dividend Distribution
12 th Sep	Catering	Cash Dividend Distribution

*EGM: Extra Ordinary Meeting

*OGM: Ordinary General Meeting

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