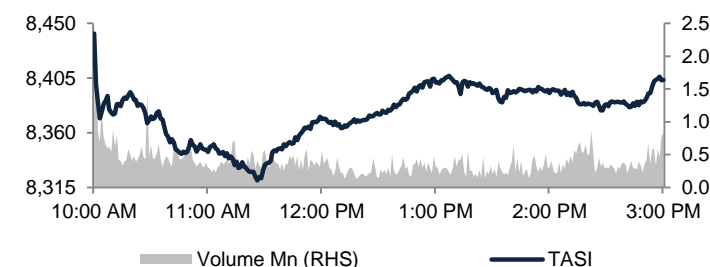


Saudi Stock Exchange

Index	Closing	High	Low	Daily Change %	YTD %
TASI	8,394	8,412	8,320	(0.8)	7.2
NomuC	3,747	3,764	3,708	(0.4)	34.9

TASI movement during session



Index	Close	Daily Change %	% YTD	PE (TTM)
Energy	4,507	1.2	(7.1)	17.1
Materials	5,200	(0.8)	(1.0)	16.1
Capital Goods	3,829	0.1	(1.8)	-17.0
Commercial Service	4,424	(1.6)	6.9	18.8
Transportation	3,840	0.5	10.4	22.7
Consumer Durables	3,502	1.1	(4.4)	-84.4
Consumer Services	3,492	(0.3)	18.5	301.9
Media	10,740	(0.3)	5.5	60.8
Retailing	7,384	0.2	7.5	34.6
Food & Staples	6,396	(0.7)	7.6	25.3
Food & Beverages	4,091	(0.4)	5.2	61.2
Healthcare	3,810	1.0	1.4	19.9
Pharma & Bio Tech	3,450	1.8	(11.1)	24.1
Banks	8,090	(1.4)	12.1	14.5
Diversified Financials	3,361	0.5	(3.4)	-27.0
Insurance	4,268	(0.9)	2.2	80.9
Telecom	6,847	0.6	26.7	35.7
Utilities	4,219	(1.0)	25.2	218.7
REITs	3,826	(0.0)	5.6	16.8
Real Estate	3,115	(0.3)	(3.4)	22.6
Software & Services	5,867	(1.7)	N.A.	N.A.

Average Index Value

Average 5 days	Average 10 days	Average 20 days	Average value traded for the month (bn)
8,563	8,675	8,826	2.87

Market Statistics

	Value Traded (SAR bn)	Volumes (mn shares)	No. of Trades ('000 shares)
Current Week	8.8	332.6	388.5
Previous week	12.8	489.3	575.8

Top Gainers

Company	Price	Change%
ALSORAYAI	9.85	9.9
THIMAR	22.20	6.3
CARE	51.00	6.3
AMIANITIT	6.07	4.7
ATC	25.40	4.3

Top Losers

Company	Price	Change%
BURUJ	18.08	-5.6
ALKHALEEJ TRNG	13.08	-5.2
SAUDI CEMENT	66.80	-4.4
WALAA	14.12	-4.0
WATANIYA	18.94	-3.7

Top Weighted Companies

Company	Price	Change%
Al Rajhi	66.30	-0.5
NCB	51.50	-3.0
SABIC	102.20	0.2
STC	108.40	0.4
Riyad	24.90	-0.8

Major Economic News

- According to Saudi Arabian Monetary Authority (SAMA) in its Financial Stability Report 2019, KSA's current foreign reserves are adept of moderating any external shock and are sufficient for approximately 40 months of imports. (Source: Argaam)

Major Corporate News

- Qassim Investment Holding Co. (QACO) sold its stake in Pure Breed Poultry Co. to Hail Agricultural Development Company (HADCO) for SAR 9.0mn. QACO's holding was worth SAR 9.4mn and book value of its holding in Pure Breed Poultry Co. was valued at SAR 3.0mn, but it was re-evaluated at SAR 9.0mn and SAR 5.5mn, respectively. (Source: Argaam)
- Halwani Bros Co.'s shareholders sanctioned 10.0% capital raise to SAR 314.3mn from SAR 285.7mn through bonus shares (one share for every 10 outstanding shares). (Source: Argaam)

Earnings update (Net Profit) (SAR mn)

Company	Q2-19	Q2-18	Y/Y %	Q1-19	Q/Q %
Aseer Trading	18.6	(2.0)	N.M.	5.3	250.9
Anaam International Holding	(3.9)	2.2	N.M.	(4.2)	N.M.
Saudi Arabia Refineries Co.	10.2	(0.5)	N.M.	(1.3)	N.M.
Al Hassan Ghazi	(9.9)	(38.9)	N.M.	(28.7)	N.M.
Saudi Airlines Catering Co.	117.1	120.3	(2.7)	103.5	13.1
Saudi Chemical Co.	30.9	27.8	11.2	39.3	(21.4)
Alandalus Property Co.	15.1	12.2	24.4	20.3	(25.4)
United Coop. Assurance	7.3	3.1	136.4	(5.5)	N.M.
Arabian Aramco (SATROP)	(474.9)	457.9	N.M.	52.5	N.M.
Gulf General Co-op. Ins.	4.6	(0.1)	N.M.	2.6	74.0
Nama Chemicals Co.	(1.0)	23.4	N.M.	(2.2)	N.M.
Allied Coop Insurance	2.5	2.9	(15.4)	2.0	25.5
Company	H1-19	H1-18	Y/Y %	H2-18	H/H %
Al Masha'ar REIT Fund	12.1	11.6	-	24.6	-
Derayah REIT Fund	25.3	21.6	-	-	-
Alkhabeer REIT Fund	16.2	-	-	-	-

Market Analysis

- The Saudi Stock Exchange decreased 0.8% to 8,394.1 on Tuesday. The value traded stood at SAR 2.9bn (down 11.8% over previous day), while the advance-decline ratio stood at 63/123. The parallel market index decreased 0.4% to 3,746.9 points. The value traded stood at SAR 0.9mn (down 41.0% over previous day). Most sectors in the main market ended in the red. Pharma & Bio Tech and Energy (up 1.8% and 1.2%, respectively) advanced the most; Software & Services and Commercial Service (down 1.7% and 1.6%, respectively) led the laggards.

Regional Markets

Market	Close	Daily Change %	MTD %	YTD %
Dubai (DFM)	2,797	-0.1	-4.2	10.6
Abu Dhabi (ADX)	5,081	0.0	-4.5	3.4
Kuwait (KSE)	4,866	-0.1	-0.3	2.7
Qatar (QE)	9,777	-1.5	-6.9	-5.1
Oman (MSM)	3,803	0.4	1.1	-12.0
Bahrain (BSE)	1,545	0.0	-0.2	15.5
Egypt (EGX30)	13,656	0.4	2.0	4.8

International Markets

Index	Close	Daily Change %	MTD %	YTD %	P/E
Dow Jones	26,030	1.2	-3.1	11.6	18.0
Nasdaq	7,521	1.4	-4.2	18.8	23.1
S&P 500	2,882	1.3	-3.3	15.0	19.6
FTSE 100	7,172	-0.7	-5.5	6.6	14.0
Germany DAX 30	11,568	-0.8	-5.1	9.6	15.6
France CAC 40	5,235	-0.1	-5.2	10.7	16.8
Japan Nikkei 225	20,585	-0.7	-4.4	2.9	15.5
Hong Kong Hang Seng	25,976	-0.7	-6.5	0.5	10.4
China Shanghai Composite	2,778	-1.6	-5.3	11.4	11.6
Australia ASX 200	6,478	-2.4	-4.9	14.7	16.8
India Sensex	36,977	0.8	-1.3	2.5	22.2

Commodity Markets

Commodity	Price	Daily Change %	MTD %	YTD %
Arab Light Crude (\$/bbl)	61.6	-1.9	-7.5	13.6
Brent Crude (\$/bbl)	58.9	-1.5	-9.6	9.6
Texas crude (\$/bbl)	53.6	-1.9	-8.4	18.7
Natural Gas (\$/mmbtu)	2.11	2.0	-5.5	-28.2
Gold (\$/oz)	1,474	0.7	4.3	14.9
Silver (\$/oz)	16.4	0.3	1.2	6.2
Steel (\$/ton)	602	0.0	-0.7	-16.5
Iron Ore (CNY/MT)	872	-1.5	-10.3	61.3
Wheat (\$/bu)	484	-2.1	-0.7	-3.8
Corn (\$/bu)	404	-0.3	0.9	7.7
Sugar (\$/lb)	11.7	-0.8	-3.9	-2.5
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	2.209	0.0	-5.7	-59.9
Saudi Arabia (SAIBOR)	2.524	-2.6	-10.3	-45.1
UAE (EIBOR)	2.428	-5.5	-14.8	-41.0
Kuwait (KIBOR)	NA	NA	NA	NA
Qatar (QIBOR)	2.775	0.0	1.2	-13.1
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 07, 2019

Regional and International Markets

- Among other regional markets, Dubai decreased 0.1%, while Abu Dhabi remained unchanged. Kuwait and Qatar decreased 0.1% and 1.5%, respectively, while Oman and Egypt increased 0.4% each. Meanwhile, Bahrain remained flat.
- According to the US Redbook same store sales rose 5.1% in the week ended August 3, compared with an increase of 4.5% in the prior month. This report has been steadily pointing to robust levels of demand in line with the strong inflation-adjusted annual sales rate of 4.3% in Q2 consumer spending. (Source: Econoday)
- In US job openings declined to 7.348mn in June (consensus: 7.293mn) compared with 7.384mn in May. Hires also eased, down 1.0% to 5.702mn from 5.760mn. Openings still stay far above hires, by 1.646mn, but openings are starting to show somewhere and are down 0.6% from June previous year. (Source: Econoday)
- Oil prices fell 1.5% on Tuesday, despite Trump administration intensified action against Venezuela in a move that only briefly lifted crude prices.
- Gold prices rose 0.7% on Tuesday as action and words from People's Bank of China reassured markets that it will not let the Yuan decline sharply.

Forex / Currency

Currency	Close	Daily Change %	MTD %	YTD %
Dollar Index	97.6	0.1	-0.9	1.5
Euro	1.12	0.0	1.1	-2.4
Japanese Yen	106.5	0.5	-2.1	-2.8
Sterling Pound	1.22	0.2	0.1	-4.6
Chinese Yuan	7.02	-0.3	2.0	2.2
Indian Rupee	71.0	0.3	3.2	2.1
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	0.0	0.3
Omani Rial	0.38	0.0	0.0	0.0
Bahraini Dinar	0.38	0.0	0.0	0.1
Egyptian Pound	16.52	0.1	0.1	-7.5

Corporate Calendar

Date	Company	Event
07 th Aug	Mulkia - REIT	Cash Dividend Distribution
08 th Aug	Albilad	Cash Dividend Distribution
08 th Aug	Extra	Cash Dividend Distribution
18 th Aug	MESC	OGM
20 th Aug	Al Jouf	Cash Dividend Distribution
20 th Aug	SAMBA	Cash Dividend Distribution

*EGM: Extra Ordinary Meeting

*OGM: Ordinary General Meeting

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