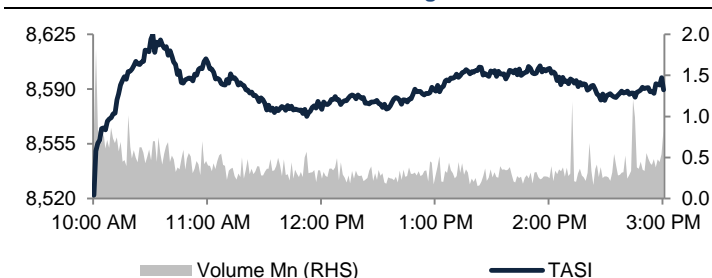


Saudi Stock Exchange

Index	Closing	High	Low	Daily Change %	YTD %
TASI	8,566	8,625	8,545	0.5	9.4
NomuC	3,860	3,980	3,831	(3.0)	38.9

TASI movement during session



Index	Close	Daily Change %	% YTD	PE (TTM)
Energy	4,689	(0.4)	(3.3)	17.8
Materials	5,269	0.3	0.3	16.3
Capital Goods	3,978	1.3	2.0	-17.7
Commercial Service	4,509	(1.1)	9.0	19.2
Transportation	3,854	(0.1)	10.8	22.8
Consumer Durables	3,557	0.1	(2.9)	-85.8
Consumer Services	3,485	0.2	18.3	301.2
Media	10,866	(0.2)	6.8	61.5
Retailing	7,531	0.2	9.7	35.3
Food & Staples	6,510	1.1	9.5	25.8
Food & Beverages	4,206	(0.9)	8.2	62.9
Healthcare	3,876	1.0	3.2	20.3
Pharma & Bio Tech	3,364	(1.5)	(13.3)	23.5
Banks	8,260	0.6	14.5	14.8
Diversified Financials	3,354	0.0	(3.6)	-26.9
Insurance	4,385	0.1	5.0	83.1
Telecom	7,033	1.7	30.1	36.6
Utilities	4,471	0.5	32.7	231.8
REITs	3,843	0.3	6.1	16.8
Real Estate	3,191	(0.1)	(1.1)	23.1
Software & Services	5,944	(0.9)	N.A.	N.A.

Average Index Value

Average 5 days	Average 10 days	Average 20 days	Average value traded for the month (bn)
8,504	8,568	8,736	2.91

Market Statistics

	Value Traded (SAR bn)	Volumes (mn shares)	No. of Trades ('000 shares)
Current Week	5.4	213.6	263.2
Previous week	15.2	562.9	589.8

Top Gainers

Company	Price	Change%
AMIANITIT	6.73	6.3
SARCO	40.60	4.2
ATAA	34.80	4.0
ANAAM HOLDING	9.24	3.8
OASIS	46.65	3.7

Top Losers

Company	Price	Change%
ALYAMAMAH STEEL	17.98	-3.4
ALSORAYAI GROUP	10.98	-2.3
SIIG	23.50	-2.3
SVCP	44.70	-2.2
ALDREES	42.25	-1.7

Top Weighted Companies

Company	Price	Change%
Al Rajhi	67.60	0.7
NCB	51.70	0.4
SABIC	104.20	1.2
STC	112.00	2.4
Riyad	26.50	0.0

Major Economic News

- According to the data published by the General Authority for Statistics (GASTAT), KSA's gross savings rose 3.0% Y/Y to SAR 251.8bn in Q1-19. The gross savings to gross domestic product (GDP) ratio stood at 35.1% in Q1-19, as against 35.0% for the same period in last year. (Source: Argaam)
- The combined earnings of KSA-listed cement manufacturers more than doubled Y/Y in H1-19 to SAR 1.1bn, on account of rising sales and strong selling prices. Seven firms reported profit growth in H1-19, led by Umm Al-Qura Cement Co., Yanbu Cement and Eastern Province Cement Co., which posted more than 100.0% growth in H1-19 earnings. (Source: Argaam)

Major Corporate News

- Mobile Telecommunications Company Saudi Arabia (Zain Saudi) began talks with the finance ministry to convert whole or part of the outstanding debts owed to the ministry. Debt will be converted into shares through partially underwriting of the proposed rights issues or any other means. (Source: Argaam)

Earnings update (Net Profit) (SAR mn)

Company	Q2-19	Q2-18	Y/Y %	Q1-19	Q/Q %
Dur Hospitality Co.	3.9	14.1	(72.6)	9.5	(59.2)
Red Sea International Co.	(27.5)	(9.8)	N.M.	(18.0)	N.M.
Saudi Research	85.6	85.5	0.1	79.9	7.1
Middle East Specialized	(6.0)	(25.3)	N.M.	(10.6)	N.M.
Arabian Centres Co.	227.0	81.0	180.4	255.4	(11.1)

Market Analysis

- The Saudi Stock Exchange increased 0.5% to 8,565.8 on Monday. The value traded stood at SAR 3.4bn (up 72.4% over previous day), while the advance-decline ratio stood at 107/66. The parallel market index decreased 3.0% to 3,859.6 points. The value traded stood at SAR 1.6mn (up 143.2% over previous day). Most sectors in the main market ended in the green. Telecom and Capital Goods (up 1.7% and 1.3%, respectively) advanced the most; Pharma & Bio Tech and Commercial Service (down 1.5% and 1.1%, respectively) led the laggards.

Regional Markets

Market	Close	Daily Change %	MTD %	YTD %
Dubai (DFM)	2,791	-0.2	-4.4	10.3
Abu Dhabi (ADX)	5,028	-0.2	-5.5	2.3
Kuwait (KSE)	4,825	-0.1	-1.2	1.8
Qatar (QE)	9,806	0.2	-6.7	-4.8
Oman (MSM)	3,869	0.2	2.9	-10.5
Bahrain (BSE)	1,529	-0.1	-1.2	14.4
Egypt (EGX30)	14,304	-0.7	6.8	9.7

International Markets

Index	Close	Daily Change %	MTD %	YTD %	P/E
Dow Jones	26,136	1.0	-2.7	12.0	18.3
Nasdaq	7,719	1.5	-1.6	21.9	23.9
S&P 500	2,924	1.2	-1.9	16.6	20.0
FTSE 100	7,190	1.0	-5.2	6.9	14.3
Germany DAX 30	11,715	1.3	-3.9	11.0	16.8
France CAC 40	5,372	1.3	-2.7	13.5	17.3
Japan Nikkei 225	20,563	0.7	-4.5	2.7	14.4
Hong Kong Hang Seng	26,292	2.2	-5.3	1.7	10.6
China Shanghai Composite	2,883	2.1	-1.7	15.6	11.9
Australia ASX 200	6,467	1.0	-5.1	14.5	17.4
India Sensex	37,402	0.1	-0.2	3.7	22.2

Commodity Markets

Commodity	Price	Daily Change %	MTD %	YTD %
Arab Light Crude (\$/bbl)	60.5	-0.6	-9.1	11.6
Brent Crude (\$/bbl)	59.7	1.9	-8.3	11.0
Texas crude (\$/bbl)	56.2	2.6	-3.9	24.6
Natural Gas (\$/mmbtu)	2.21	0.5	-1.0	-24.8
Gold (\$/oz)	1,495	-1.2	5.8	16.5
Silver (\$/oz)	16.9	-1.3	3.7	8.9
Steel (\$/ton)	582	-0.5	-4.0	-19.3
Iron Ore (CNY/MT)	736	0.7	-24.3	36.2
Wheat (\$/bu)	466	-1.1	-4.5	-7.5
Corn (\$/bu)	365	-1.6	-8.8	-2.7
Sugar (\$/lb)	11.5	-1.5	-6.1	-4.7
SMP* (EUR/MT)	2,150	1.8	2.8	18.8

*SMP: Skimmed Milk Powder

Interbank Rates

Region	Rate*	Daily Change (bps)	MTD (bps)	YTD (bps)
USD LIBOR	2.136	0.0	-13.0	-67.2
Saudi Arabia (SAIBOR)	2.457	-1.0	-17.0	-51.8
UAE (EIBOR)	2.458	2.5	-11.8	-38.0
Kuwait (KIBOR)	NA	NA	NA	NA
Qatar (QIBOR)	2.822	3.4	5.9	-8.4
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 20, 2019

Regional and International Markets

- Among other regional markets, Dubai and Abu Dhabi decreased 0.2% each. Kuwait, Bahrain and Egypt decreased 0.1%, 0.1% and 0.7%, respectively, while Qatar and Oman increased 0.2% each.
- The US E-commerce retail sales rose 4.2% Q/Q in the Q2-19 compared with an increase of 3.6% in the Q1-19. On Y/Y basis, E-commerce retail sales were up 13.3%. As a percentage of total retail sales, e-commerce increased to 10.7%. (Source: Econoday)
- Eurozone's HICP fell 0.5% M/M (consensus: down 0.4%) in July compared with an increase of 0.2% in the prior month. On Y/Y basis, Eurozone's HICP rose 1.0% (consensus: 1.1%) in the month of July compared with a rise of 1.3% earlier. (Source: Econoday)
- Oil prices rose 2.6% on Monday, due to a positive spin on U.S.-China trade discussions and reports of a new drone attack on a Saudi oilfield.
- Gold prices fell 1.2% on Monday, as improved optimism on the trade front and dialog of incentive by global policy makers dampens investor appetite for gold.

Forex / Currency

Currency	Close	Daily Change %	MTD %	YTD %
Dollar Index	98.3	0.2	-0.2	2.3
Euro	1.11	-0.1	0.0	-3.4
Japanese Yen	106.6	0.2	-1.9	-2.7
Sterling Pound	1.21	-0.2	-0.3	-5.0
Chinese Yuan	7.05	0.1	2.4	2.5
Indian Rupee	71.4	0.4	3.7	2.7
UAE Dirham	3.67	0.0	0.0	0.0
Qatari Rial	3.66	0.5	0.5	0.5
Kuwaiti Dinar	0.30	0.0	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	16.55	0.1	0.3	-7.3

Corporate Calendar

Date	Company	Event
20 th Aug	Al Jouf	Cash Dividend Distribution
20 th Aug	SAMBA	Cash Dividend Distribution
21 st Aug	NCB	Cash Dividend Distribution
26 th Aug	STC	Cash Dividend Distribution
26 th Aug	BJAZ	Cash Dividend Distribution
28 th Aug	AlSorayai Group	EGM

*EGM: Extra Ordinary Meeting

*OGM: Ordinary General Meeting

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