

REVIEW OF STOCK MARKETS

Before the opening of trading on Friday 30 August some moderately positive external background formed on the Russian market. On Thursday the US indices DJIA and S&P500 rose by 1.3%, on Friday the composite index of the Asia-Pacific region MSCI Asia Pacific added a percent. Improvement of investors' sentiment was facilitated by a statement by a representative of the Chinese Ministry of Commerce that Beijing would not immediately respond to Washington's tariff increases and hoped that the White House could cancel them to prevent the escalation of the trade war and create the necessary conditions for negotiations. According to experts, Beijing did not leave unanswered the previous steps of the United States, which introduced new duties on Chinese goods, and refusal of action this time could mean a change in strategy. In addition, the markets in the Asian session were supported by good statistics from Japan, where industrial production rose in July after falling the previous month and unemployment fell to a record low. The inexpressive changes of the Chinese market – the CSI300 index added a modest 0.2% – were also due to increased risks of an escalation of the political crisis in Hong Kong. The reason for this was media information about the arrest of protest leaders and Beijing's refusal to repeal the law on extradition to mainland China. October Brent futures were trading at around \$60.8 per barrel, at the level of our close on 29 August.

On Friday, optimistic sentiment remained on the global stock exchanges amid weakening trade tensions between the US and China. Investors' confidence in improving the prospects of a trade deal was further strengthened after a statement by the Chinese Foreign Minister that the delegations of the parties continued to maintain effective communications. In the afternoon, the growth rates of the MOEX Russia Index, the index of emerging markets MSCI EM and the European Stoxx Europe 600 Index averaged about a percent. At the end of the trading session, the growth of European markets slowed somewhat after the start of trading in the US with a slight decrease in the main indices under the pressure of own weak statistics – the consumer confidence index in August fell to a minimum since October 2016. This made smaller impression on Russian investors – the MOEX Russia Index closed trading with a percentage increase. Norilsk Nickel's shares became the driver of our market's upturn, gaining more than 4% at daily highs following an 8% spike in nickel prices on information about Indonesia imposing a ban on the export of this metal from next year.

During the day, the electric utilities sector index underperformed, mainly due to shares of Inter RAO, in which profits were recorded after steady growth during the week.

ELECTRIC POWER INDUSTRY NEWS

The new program for development of the electric power industry of the Russian Federation to include digitalization and artificial intelligence, – says Mr. Novak

The new program for development of the Russian electric grid complex will include digital technologies and artificial intelligence (AI), said Russian Energy Minister Alexander Novak during a speech at the award ceremony for winners of the All-Russian Congress of leaders and specialists of the electric grid complex "Energy Leaders" in Chelyabinsk on Saturday, 31 August.

Read full text: <http://www.bigpowernews.ru/news/document89613.phtml>

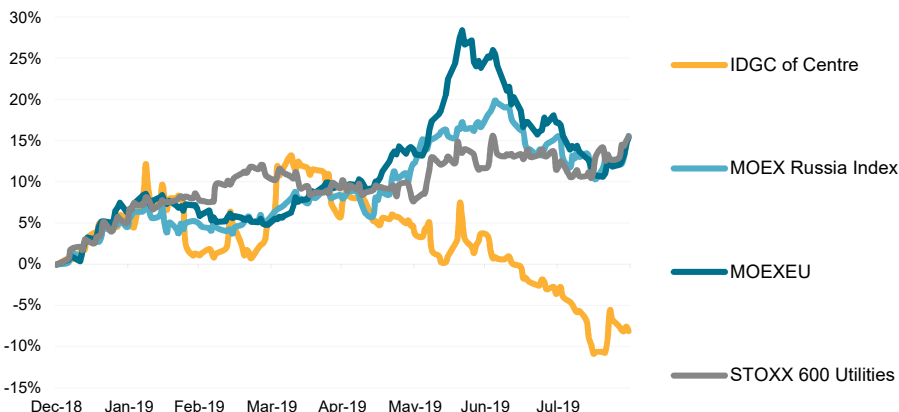
COMPANY NEWS

A power storage device to appear in Belgorod

The first in the Belgorod region innovative energy storage system will be installed by power engineers of the company "Rosseti Centre Belgorodenergo" in the southwestern micro-district. The battery will accumulate electricity during minimum consumption and give out during peak hours.

Read full text: <https://regnum.ru/news/2704319.html>

DYNAMICS OF KEY INDEXES AND SHARES OF THE COMPANY



World indexes	Value	Change	
		per day	fr 31.12.18
MOEX Russia	2740,04	0,95%	15,65%
S&P 500	2923,08	-0,05%	16,60%
FTSE 100	7207,18	0,32%	7,12%
DAX	11939,28	0,85%	13,07%
DJStoxx 600	379,48	0,73%	12,39%
Nikkei	20704,37	1,19%	3,45%
Sensex	37332,79	0,71%	3,51%
CSI300	3799,59	0,25%	26,20%
Bovespa	101177	0,65%	15,12%

Source: Bloomberg, Company calculations (19:00 MSK)

Currency rates	Value	Change	
		per day	fr 31.12.18
USD/RUB	66,7471	0,50%	-3,92%
EURO/RUB	73,9558	0,40%	-6,93%

Source: Bloomberg, Company calculations (19:00 MSK)

Raw	Value	Change	
		per day	fr 31.12.18
Gold, USD/oz	1527,27	-0,03%	19,09%
Brent*, USD/bbl	60,31	-1,26%	12,10%

* - October futures

Source: Bloomberg, Company calculations (19:00 MSK)

Shares	Price**, ₹	MCap**, ₹ bln	MCap**, \$ mln
IDGC of Centre & Volga Reg	0,2514	28,33	424,47

Source: Central Bank of Russia, Company calculations

Comparison with indexes	Change	
	per day	fr 31.12.18
STOXX 600 Utilities	0,43%	15,56%
MOEXEU	0,56%	15,38%
IDGC of Centre**	-0,61%	-8,11%
IDGC of Centre and Volga Region**	0,32%	-5,13%

Source: Bloomberg, Company calculations

Grid companies	Change**	
	per day	fr 31.12.18
Rosseti, ordinary shares	1,28%	51,23%
FGC UES	2,78%	19,84%
IDGC of Volga	0,27%	-5,97%
MOESK	-2,05%	16,06%
IDGC of Northern Caucasus	-1,62%	125,86%
IDGC of North-West	0,25%	8,29%
IDGC of Urals	-0,23%	-5,53%
IDGC of Siberia	-2,72%	147,80%
IDGC of South	0,42%	10,56%
Lenenergo, ordinary shares	-0,35%	8,13%
TRK, ordinary shares	0,00%	-5,84%
Kubanenergo	0,00%	23,16%

Source: MOEX, Company calculations

** - at the price of last transaction at MOEX

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Tickers

Moscow Exchange (MOEX)

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