

## REVIEW OF STOCK MARKETS

Before the opening of trading on Wednesday 17 June some neutral external background formed on the Russian market. On Tuesday, the US indices DJIA and S&P500 rose by 1.9-2% due to strong data on retail sales, soaring in May two times more than forecasts, a record of 17.7% m/m. According to WSJ, since about a third of the country's GDP is associated with retail sales, the scale of the May recovery of this indicator will inevitably lead to better forecasts for the economic recovery in the second quarter. At the same time, buyers' activity – the indices retreated by a percentage point from daily highs – was restrained by the caution of the Fed's head, who once again warned of long-term damage to the US economy due to the Covid-19 pandemic, and industrial production statistics, whose growth in May was twice worse than expected. On Wednesday, the composite index of the Asia-Pacific region MSCI Asia Pacific added 0.1%, the potential for the indicator rise was limited by sales in the Japanese market. The Nikkei225 lost 0.6% after the publication of a weak report on foreign trade – in May, exports collapsed to a maximum of more than ten years, 28.3% y/y. August Brent futures were trading around \$40.6 per barrel, \$0.3 higher than our close on 16 June.

On Wednesday, there was mixed sentiment on global stock markets. European markets continued growing – the consolidated Stoxx Europe 600 during the day added an average of more than half a percent on news about the lifting of quarantine measures in Europe and the corresponding increase in hopes for an accelerated "restart" of the region's economy. At the same time, futures for the US indices were under pressure from media information about a record number of Covid-19 cases in six states that had previously begun to ease anti-epidemic restrictions and weak statistics on the housing market. In May, the number of new buildings in the country increased by 4.3% m/m, while Bloomberg's consensus forecast suggested a jump of 23.5%. The MOEX Russia Index, which showed a moderate rise in the first half of the day, on average within half a percent, in the second half of the trading session fixed in a slight minus, including reacting to the reversal of Brent quotes from morning highs near the mark of \$41.5 per barrel. Negative background for the oil market was the OPEC's forecast for a decrease in world oil demand in 2020 by 9.1 million barrels per day and statistics from the US Department of Energy, which, contrary to expectations, recorded an increase in oil reserves in the country last week.

During the day, changes of the electric utilities sector index generally corresponded to the market. The main contribution to the final MOEXEU decline was made by RusHydro's shares, in which profit was taken after a 6% growth on Tuesday.

## ELECTRIC POWER INDUSTRY NEWS

### Rosseti's Group to create 34 digital Distribution Zones in 2020

Projects for constructing digital Distribution Zones are being implemented in the service areas of Rosseti Centre, Rosseti Yantar and Rosseti North-West, where clusters have already been formed for testing Smart Grid technologies, as well as in the service area of Rosseti Center and Volga Region.

Read full text: <http://www.rosseti.ru/press/news/>

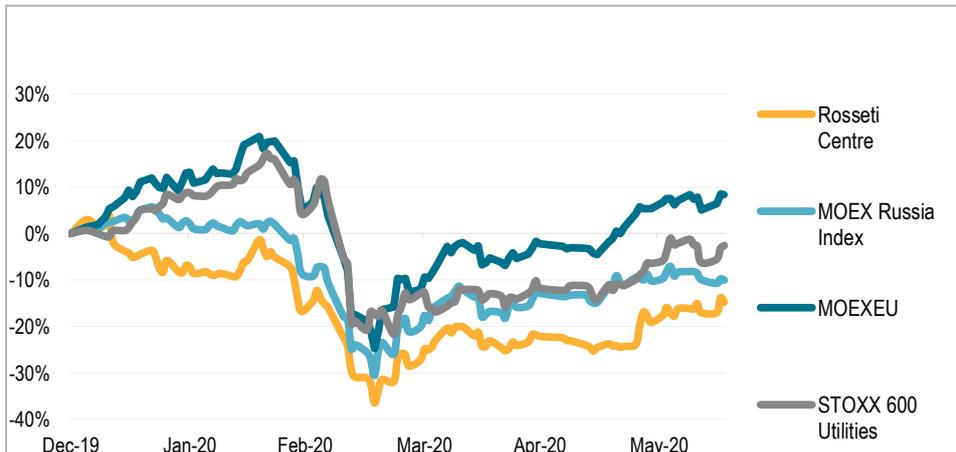
## COMPANY NEWS

### Rosseti Centre - Orelenergo prevented 57 cases of energy theft for 5 months of this year

"Rosseti Centre Orelenergo" conducts a systematic struggle to prevent and detect theft of electricity. For this purpose, the "Mobile Inspection Control Unit" subdivision was created in the branch, which included employees from the security, energy conservation and energy efficiency improvement departments.

Read full text: <https://www.mrsk-1.ru/press-center/news/>

## CHANGES OF KEY INDEXES AND SHARES OF THE COMPANY



World indexes	Value	Change	
		per day	fr 31.12.19
MOEX Russia	2740,1	-0,30%	-10,04%
S&P 500	3127,02	0,07%	-3,21%
FTSE 100	6253,25	0,17%	-17,09%
Nikkei	22455,76	-0,56%	-5,08%
Sensex	33507,92	-0,29%	-18,78%
CSI300	4017,59	0,08%	-1,93%
Bovespa	94656	1,20%	-18,15%

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

Currency rates	Value	Change	
		per day	fr 31.12.19
USD/RUB	69,7524	-0,91%	12,68%
EURO/RUB	79,0434	-0,13%	13,99%

Source: Central Bank of Russia, Company calculations

Liquidity	Rosseti Centre	Rosseti Center & Volga Region
	Number of transactions, pcs.	1006
Trading volume, ₺ mln	9,2	17,3
Trading volume, mln pcs.	33,4	88,8
Average trading volume over the last 30 days, mln pcs.	38,3	105,1
% of the authorized capital	0,08%	0,08%

Source: MOEX, Company calculations

Shares	Price**, ₺	MCap**, ₺ bln	MCap**, \$ mln
		Rosseti Centre	0,2702
Rosseti Center & Volga Reg	0,1924	21,68	310,86

Source: MOEX, Company calculations

Comparison with indexes	Change	
	per day	fr 31.12.19
STOXX 600 Utilities	0,66%	-2,59%
MOEXEU	-0,12%	8,34%
Rosseti Centre**	-1,03%	-14,76%
Rosseti Center & Volga Region**	0,26%	-19,50%

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

Grid companies	Change**	
	per day	fr 31.12.19
Rosseti	0,42%	12,85%
Rosseti FGC UES	0,30%	-6,30%
Rosseti Volga	0,83%	-17,41%
Rosseti Moscow Region	0,71%	-4,87%
Rosseti Northern Caucasus	1,53%	-11,67%
Rosseti North-West	-2,12%	-9,35%
Rosseti Ural	2,66%	-1,94%
Rosseti Siberia	5,77%	-19,90%
Rosseti South	-0,49%	-18,81%
Rosseti Lenenergo	0,50%	-13,49%
Rosseti Tomsk	-1,56%	-12,09%
Rosseti Kuban	-0,70%	11,16%

Source: MOEX, Company calculations

\*\* - at the price of last transaction at MOEX

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### Tickers

Moscow Exchange (MOEX)

Bloomberg

Reuters

MRKC

MRKC.RM

MRKC.MM