

## REVIEW OF STOCK MARKETS

Before the opening of trading on Tuesday 30 June some moderately positive external background formed on the Russian market. On Monday, the US indices DJIA and S&P500 rose by 2.3% and 1.5%, respectively, after the release of strong statistics on the housing market, which strengthened the expectations of market participants for a quick recovery in the US economy. The index of pending home sales, which is a leading indicator of activity on the real estate market, in May jumped to a record 44.3% mom. The main contribution to the DJIA's accelerated rise was made by Boeing's shares, which soared 15% after the WSJ reported on the start of test flights of 737 MAX aircraft and expectations of resumption of operation of these aircraft by the end of the year. On Tuesday, the composite index of the Asia-Pacific region MSCI Asia Pacific added 1.3%. An additional positive factor in the Asian session was good statistical data from China, where the official PMIs in the manufacturing and services sectors, contrary to forecasts, continued to rise and reached 50.9 and 54.4 points, respectively. According to Reuters, business activity in China is accelerating growth amid economic recovery after the authorities lifted quarantine restrictions, as well as due to an increase in government investment. August Brent futures were trading at around \$41.4 per barrel, at the level of our close on 29 June.

On Tuesday, sellers dominated the Russian market, in the afternoon the decline of the MOEX Russia Index exceeded 0.5%. In addition to taking profit before the weekend, our market was pressured by lower oil prices and increased geopolitical risks. Brent quotes fell below \$41 per barrel on reports of the Libyan National Oil Corporation on progress in negotiations to lift the blockade on oil facilities and resume production. As a result, analysts say, Libya will be able to resume export stopped since January due to the Civil War and bring about an additional 1 million barrels per day to the market. In turn, the strengthening of geopolitical risks for the Russian Federation provoked information from the American media about the ties of the Russian special services with the Taliban in Afghanistan. Against this background, the Russian government bond index showed maximum daily losses since March, the dollar-ruble pair rose above RUB71/\$1 for the first time since the end of May. The MOEX Russia Index closed trading lower by 0.9%, despite the improvement in sentiment on western markets thanks to good statistics from the US, where the consumer confidence index in June, surpassing expectations, rose to its highest level in three months. After the publication of these data, the MSCI ACWI index, which traded most of the day in a small minus, including on the warnings of the head of the WHO about the accelerating pandemic Covid-19, switched to a half-percent increase.

At the end of the day, the electric utilities sector index outperformed, mainly due to growth of shares of Mosenergo and Unipro.

## ELECTRIC POWER INDUSTRY NEWS

### Electric grid companies from 1 July to begin to install meters at their own expense

Electric grid companies and suppliers of last resort from 1 July will begin to install electricity consumption meters at their own expense.

Read full text: <https://tass.ru/ekonomika/>

### Energy sales companies to be able to work without licenses for another year

The government allowed power sales companies to operate without licenses until 1 July 2021.

Read full text: <https://www.kommersant.ru/>

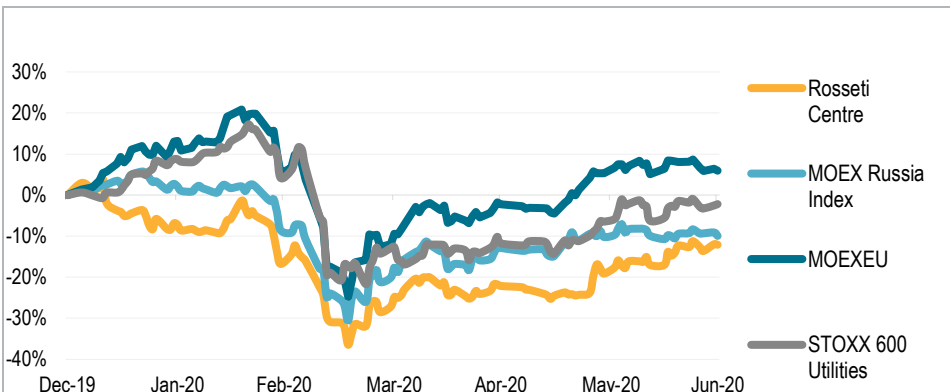
## COMPANY NEWS

### Igor Makovskiy: the economic effect of reducing losses in Rosseti Centre and Rosseti Centre and Volga Region accounted for more than 180 million rubles since the beginning of the year

Rosseti Centre and Rosseti Centre and Volga Region summed up the implementation of the Electricity Loss Reduction Program for 4 months of 2020.

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	2743,2	-0,89%	-9,94%
S&P 500	3078,95	0,84%	-4,70%
FTSE 100	6169,74	-0,90%	-18,20%
Nikkei	22288,14	1,33%	-5,78%
Sensex	34915,8	-0,13%	-15,36%
CSI300	4163,96	1,32%	1,64%
Bovespa	95884,1	0,16%	-17,09%

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

Currency rates	Value	Change	
		per day	fr 31.12.19
USD/RUB	69,9513	1,19%	13,00%
EURO/RUB	78,6812	1,47%	13,47%

Source: Central Bank of Russia, Company calculations

Liquidity	Rosseti Centre	Rosseti Centre & Volga Region
	Number of transactions, pcs.	522
Trading volume, ₺ mln	5,9	24,2
Trading volume, mln pcs.	21,0	124,8
Average trading volume over the last 30 days, mln pcs.	40,3	113,4
% of the authorized capital	0,05%	0,11%

Source: MOEX, Company calculations

Shares	Price**, ₺	MCap**, ₺ bln	MCap**, \$ mln
Rosseti Centre	0,2786	11,76	168,14
Rosseti Centre & Volga Reg	0,1974	22,25	318,03

Source: MOEX, Company calculations

Comparison with indexes	Change	
	per day	fr 31.12.19
STOXX 600 Utilities	0,34%	-2,18%
MOEXEU	-0,46%	5,92%
Rosseti Centre**	-0,14%	-12,11%
Rosseti Centre & Volga Region**	4,22%	-17,41%

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

Grid companies	Change**	
	per day	fr 31.12.19
Rosseti	-2,32%	7,92%
Rosseti FGC UES	-0,56%	-6,83%
Rosseti Volga	0,86%	-14,59%
Rosseti Moscow Region	-0,55%	-8,22%
Rosseti Northern Caucasus	-0,76%	-12,80%
Rosseti North-West	-1,42%	-8,89%
Rosseti Ural	-0,50%	-3,27%
Rosseti Siberia	-0,21%	-21,84%
Rosseti South	-0,30%	-19,37%
Rosseti Lenenergo	-0,33%	-14,63%
Rosseti Tomsk	1,35%	-12,79%
Rosseti Kuban	1,88%	11,01%

Source: MOEX, Company calculations

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

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### Tickers

Moscow Exchange (MOEX)

Bloomberg

Reuters

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