

## REVIEW OF STOCK MARKETS

Before the opening of trading on Tuesday 16 June some moderately positive external background formed on the Russian market. The US indices DJIA and S&P500, which lost 2.5-3% at the beginning of the trading session on Monday due to fears of the arrival of the second wave of coronavirus, closed the day with an increase of 0.6-0.8%. The reversal followed the Fed's announcement of the start of the purchase of corporate bonds in the secondary market as part of a program to support small and medium-sized businesses and an increase in its volume to \$750 billion. On Tuesday, the composite index of the Asia-Pacific region MSCI Asia Pacific and the S&P500 futures added 3.4% and 0.9%, respectively. An additional positive factor in the Asian session was Bloomberg's information on the preparation by the US administration of an infrastructure package worth almost \$1 trillion to revive the world's largest economy. The Japanese Nikkei225 became the leader in the growth of regional indices, soaring 4.9% on the decision of the Bank of Japan to increase the size of the loan program for companies experiencing cash shortages by one and a half times, to \$1 trillion. August Brent futures were trading at around \$39.8 per barrel, \$0.1 below the closing level on 15 June.

On Tuesday, optimism returned to global stock markets. In the morning, the MSCI ACWI composite index added about 2% on information about the expansion of incentives by the central banks of the USA and Japan and good statistics from Germany, where the index of economic expectations in June jumped to the maximum since March 2006. The MSCI ACWI growth exceeded 3% after published strong US retail sales data. In May, the indicator soared twice as much as expected, by a record of 17.7%, reviving hopes for a quick recovery in the US economy – about 70% of the country's GDP falls on consumer spending. At the end of the day, the pace of the market recovery slowed down somewhat, the reason for taking profit was statistics on the US industrial production and the caution of the head of the Federal Reserve in assessing the prospects for the country's economic recovery. The industrial production growth in May turned out to be half the forecast, the indicator drop in April deteriorated to 12.5% – a record decline for more than a hundred-year history of the indicator calculations. In turn, Jerome Powell again warned of long-term damage to the US economy, which, despite some signs of recovery, is facing difficulties due to increased unemployment and a wave of bankruptcies of small businesses in the pandemic. Additional pressure on the markets was provided by media reports about the closure of schools in Beijing and the increase in the level of epidemic danger in the capital to the second level, reminding investors about the risks of the second wave of the Covid-19 pandemic. The MOEX Russia Index, which added more than 2% at daily highs, including due to an increase in Brent price to \$41.5 per barrel, lost a third of the growth by the end of trading following a reversal in oil prices and a deterioration in sentiment on western markets.

During the day, the electric utilities sector index outperformed. RusHydro's shares made the main contribution to the final MOEXEU outperformance in comparison with the MOEX Russia Index.

## ELECTRIC POWER INDUSTRY NEWS

### Energy sales companies submitted proposals for settlements with grid companies to the Ministry of Energy of the Russian Federation

Association of Guaranteed Suppliers and Energy Sales Companies sent their proposals to the Minister of Energy of the Russian Federation, Alexander Novak, regarding payments to electric grid companies, follows from the corresponding letter on the association's website.

Read full text: <https://emitent.1prime.ru/News/>

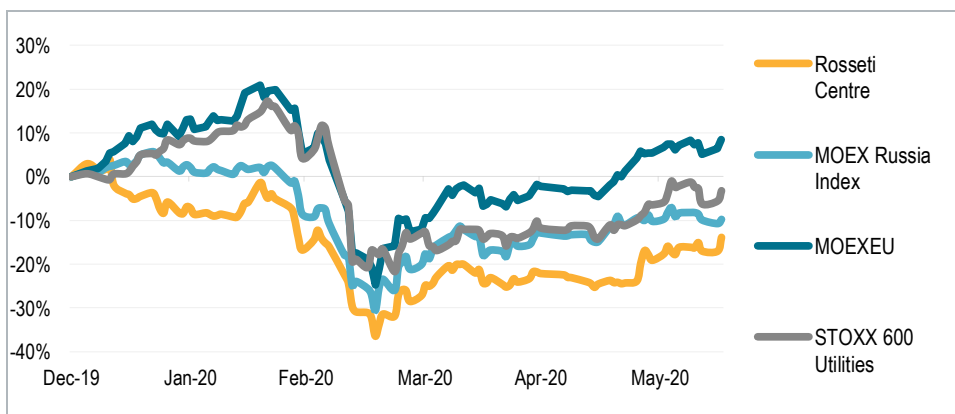
## COMPANY NEWS

### Since the beginning of the year, specialists at "Rosseti Centre Voronezhenergo" repaired over 690 kilometres of overhead power lines and over 120 transformer substations

The branch "Rosseti Centre Voronezhenergo" summed up the implementation of the repair program for four months of 2020. All activities planned for the reporting period were completed in full and on time.

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	2748,3	1,08%	-9,77%
S&P 500	3128,05	2,00%	-3,18%
FTSE 100	6242,79	2,94%	-17,23%
Nikkei	22582,21	4,88%	-4,54%
Sensex	33605,22	1,13%	-18,54%
CSI300	4014,57	1,51%	-2,00%
Bovespa	94062	1,83%	-18,66%

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

Currency rates	Value	Change	
		per day	fr 31.12.19
USD/RUB	70,395	1,84%	13,71%
EURO/RUB	79,1451	0,79%	14,14%

Source: Central Bank of Russia, Company calculations

Liquidity	Rosseti Centre	Rosseti Center & Volga Region
	Number of transactions, pcs.	2352
Trading volume, ₺ mln	23,0	26,9
Trading volume, mln pcs.	83,7	139,4
Average trading volume over the last 30 days, mln pcs.	36,5	104,5
% of the authorized capital	0,20%	0,12%

Source: MOEX, Company calculations

Shares	Price**, ₺	MCap**, ₺ bln	MCap**, \$ mln
Rosseti Centre	0,273	11,53	163,73
Rosseti Center & Volga Reg	0,1919	21,63	307,22

Source: MOEX, Company calculations

Comparison with indexes	Change	
	per day	fr 31.12.19
STOXX 600 Utilities	2,47%	-3,22%
MOEXEU	1,91%	8,46%
Rosseti Centre**	3,80%	-13,88%
Rosseti Center & Volga Region**	0,95%	-19,71%

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

Grid companies	Change**	
	per day	fr 31.12.19
Rosseti	-0,12%	12,38%
Rosseti FGC UES	1,65%	-6,58%
Rosseti Volga	2,04%	-18,08%
Rosseti Moscow Region	0,85%	-5,54%
Rosseti Northern Caucasus	-0,84%	-13,00%
Rosseti North-West	1,54%	-7,39%
Rosseti Ural	0,77%	-4,48%
Rosseti Siberia	0,43%	-24,27%
Rosseti South	0,40%	-18,40%
Rosseti Lenenergo	0,00%	-13,92%
Rosseti Tomsk	0,26%	-10,70%
Rosseti Kuban	1,57%	11,95%

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