

## REVIEW OF STOCK MARKETS

Before the opening of trading on Friday 26 June some moderately positive external background formed on the Russian market. The US indices DJIA and S&P500 closed Thursday with an increase of 1.1-1.2% due to the rise in the last hour of the trading session in anticipation of the publication by the Fed of the results of stress tests of the largest banks. At the same time, Bloomberg noted, investors continue to ignore the risks of the second wave of Covid-19 – the number of new infections in the US per day has grown to record levels, and the associated threats of restoring quarantine restrictions and a corresponding slowdown in the pace of “restarting” the economy. On Friday, the composite index of the Asia-Pacific region MSCI Asia Pacific added 0.6% following the rise in the US market. Additional support for investors in the Asian session was provided by statements by the head of the Bank of Japan on his readiness to increase incentive measures in the face of the risk of a second wave of the coronavirus pandemic. August Brent futures were trading around \$41.3 per barrel, \$0.7 higher than our close on 25 June. Oil prices were rising as part of a general improvement in the attitude towards risky assets.

For most of Friday, optimistic sentiment prevailed in the Russian and European markets. The MOEX Russia Index added an average of 0.5% due to rising oil prices, the consolidated European Stoxx Europe 600 – about a percent on statements by the head of the ECB about the probable going through the worst period of the economic crisis by the Eurozone. Ambiguous statistics from the United States did not significantly affect the changes of trading. In May, household spending jumped to a record of 8.2% mom after a fall of 12.6% in April, revenue fell to a maximum of 4.2% since 2013 after rising to a record of 10.8% a month earlier. According to analysts, such volatile changes of the indicators were due to lump sum payments in April. At the end of the day, sellers in the Russian and European markets intensified, the MOEX Russia Index and the Stoxx Europe 600 Index fell to zero after the start of trading in the USA with a two percent drop in the main indices on information about the suspension in several states of the easing of restrictions due to the outbreak of Covid-19 diseases and published results stress tests of the banking system by the Fed. According to the Fed, the largest US banks in the event of a prolonged economic downturn may suffer losses of up to \$700 billion due to losses on bad loans. In this regard, the regulator decided to preserve the capital of banks by suspending the repurchase of own shares and limiting the payment of dividends in the third quarter. Against this background, the fall of the American market was led by the financial sector – the losses of the S&P500 Financials exceeded 4%.

During the day, the electric utilities sector index underperformed. The main contribution to the final MOEXEU decline in antiphase with the MOEX Russia Index was made by shares of RusHydro and FGC UES.

## ELECTRIC POWER INDUSTRY NEWS

### Rosseti to invest 1.3 trillion rubles in digitalization until 2030

Rosseti's Group will invest 1.3 trillion rubles for the digital transformation of the electric grid complex by 2030, said Deputy Energy Minister Evgeniy Grabchak in an interview with the journal “Electric Power News”.

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

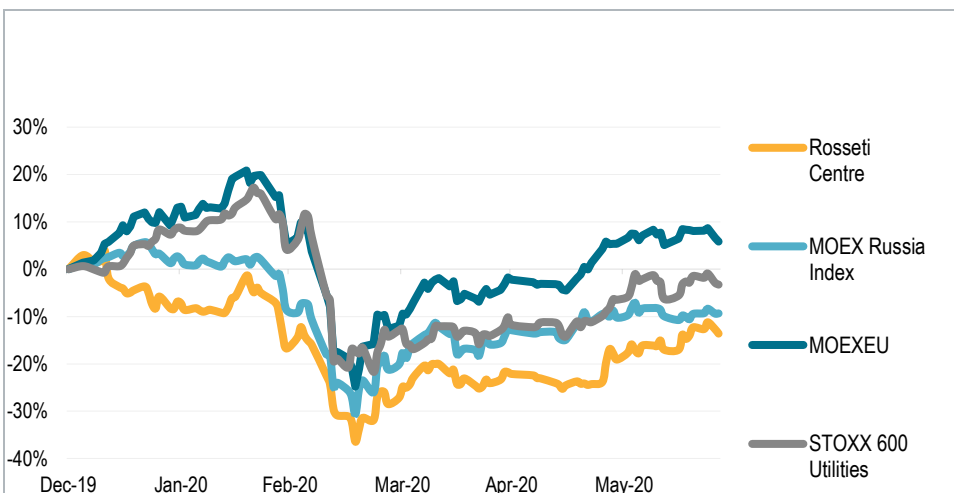
## COMPANY NEWS

### Belgorodenergo modernizes the 110 kV “Mayskaya” substation

“Rosseti Centre Belgorodenergo” is implementing a pilot project to set up remote control of equipment of the 110 kV “Mayskaya” substation directly from a branch of JSC SO UES - Kursk Transmission Grid Control Centre.

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	2761,74	0,04%	-9,33%
S&P 500	3024,19	-1,93%	-6,39%
FTSE 100	6159,3	0,20%	-18,34%
Nikkei	22512,08	1,13%	-4,84%
Sensex	35171,27	0,94%	-14,74%
CSI300	4138,99	0,00%	1,04%
Bovespa	94690,4	-1,35%	-18,12%

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

Currency rates	Value	Change	
		per day	fr 31.12.19
USD/RUB	69,466	0,91%	12,21%
EURO/RUB	78,0589	0,39%	12,57%

Source: Central Bank of Russia, Company calculations

Liquidity	Rosseti Centre	Rosseti Centre & Volga Region
	Number of transactions, pcs.	448
Trading volume, ₺ mln	6,4	18,9
Trading volume, mln pcs.	23,0	100,0
Average trading volume over the last 30 days, mln pcs.	39,9	111,7
% of the authorized capital	0,05%	0,09%

Source: MOEX, Company calculations

Shares	Price**, ₺	MCap**, ₺ bln	MCap**, \$ mln
		Rosseti Centre	0,2738
Rosseti Centre & Volga Reg	0,1884	21,23	305,65

Source: MOEX, Company calculations

Comparison with indexes	Change	
	per day	fr 31.12.19
STOXX 600 Utilities	-0,42%	-3,25%
MOEXEU	-0,75%	5,85%
Rosseti Centre**	-1,08%	-13,63%
Rosseti Centre & Volga Region**	-1,26%	-21,17%

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

Grid companies	Change**	
	per day	fr 31.12.19
Rosseti	-1,43%	8,75%
Rosseti FGC UES	-2,83%	-7,74%
Rosseti Volga	-0,46%	-14,76%
Rosseti Moscow Region	-1,03%	-7,22%
Rosseti Northern Caucasus	0,08%	-12,13%
Rosseti North-West	-1,92%	-9,17%
Rosseti Ural	-0,12%	-3,03%
Rosseti Siberia	-2,03%	-22,01%
Rosseti South	-0,20%	-19,13%
Rosseti Lenenergo	-0,17%	-14,35%
Rosseti Tomsk	-2,12%	-13,95%
Rosseti Kuban	-1,15%	8,49%

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