

## REVIEW OF STOCK MARKETS

Before the opening of trading on Wednesday 27 May some neutral external background formed on the Russian market. On Tuesday, the US indices DJIA and S&P500 rose by 1.2-2.2% due to news about the removal of quarantine restrictions and the development of a vaccine for coronavirus – the pharmaceutical companies Merck and Novavax reported progress in this direction. In addition, good statistics supported investors – the consumer confidence index in May rose after two months of free fall, sales of new buildings in April increased by 0.6% mom against expectations of more than a 20% collapse. At the same time, at the end of the trading session, the indices lost almost a percentage point of the rise after Bloomberg reported that the White House was considering imposing sanctions against Chinese officials, companies and financial institutions. On Wednesday, the composite index of the Asia-Pacific region MSCI Asia Pacific added 0.2%, with multidirectional changes of the main country indices. The Chinese CSI300 lost 0.7% under pressure of fears of further deterioration of the US-China relations, while the Japanese Nikkei225 grew by 0.7% on information about new measures to support the economy. According to media reports, the Japanese government approved an additional stimulus package worth ¥117 trillion (\$1.1 trillion), taking into account the new assistance program, the total cost of combating the effects of the coronavirus pandemic will amount to more than 40% of the GDP. July Brent futures were trading around \$35.5 per barrel, \$0.1 below our close on 26 May.

In the first half of the trading session on Wednesday, optimistic mood prevailed on world stock markets – the MSCI ACWI composite index added about a percent. According to experts, investors enthusiastically accepted the European Commission's anti-crisis economic recovery plan for €750 billion, of which €500 billion are proposed to be distributed in the form of grants, and €250 billion in the form of loans. At the same time, the activity of buyers was limited by fears of an escalation of the conflict between Washington and Beijing over the situation around Hong Kong. In particular, Donald Trump said that the United States is working on a decisive response to China's planned adoption of Hong Kong's national security law, and will announce it by the end of the week. At the end of the day, the MSCI ACWI Index moved to negative territory after the negative start of trading in the United States, where shares of high-tech sector companies led the decline. According to analysts, as a response to increasing the US pressure, Beijing considers the introduction of restrictions on a number of companies in this sector. An additional negative factor for the Russian market – the MOEX Russia Index closed trading with a decrease of 0.5% – was a drop in oil prices. Brent quotes fell below \$34.5 per barrel both on increasing geopolitical risks and on Bloomberg's information that Russia was proposing to gradually restore production in July, despite Saudi Arabia's intention to maintain OPEC+'s current restrictions for another two months. According to analysts, this position of Russia may indicate that the struggle for the market share may resume as oil demand recovers.

During the trading session, changes of the electric utilities sector index corresponded to the market. The main contribution to the final MOEXEU decline was made by shares of Rosseti and FGC UES.

## ELECTRIC POWER INDUSTRY NEWS

### The state is trying to maintain investment programs of natural monopolies

The state in the current crisis is trying by all means to preserve the investment programs of natural monopolies, said Deputy Prime Minister Yuriy Borisov.

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

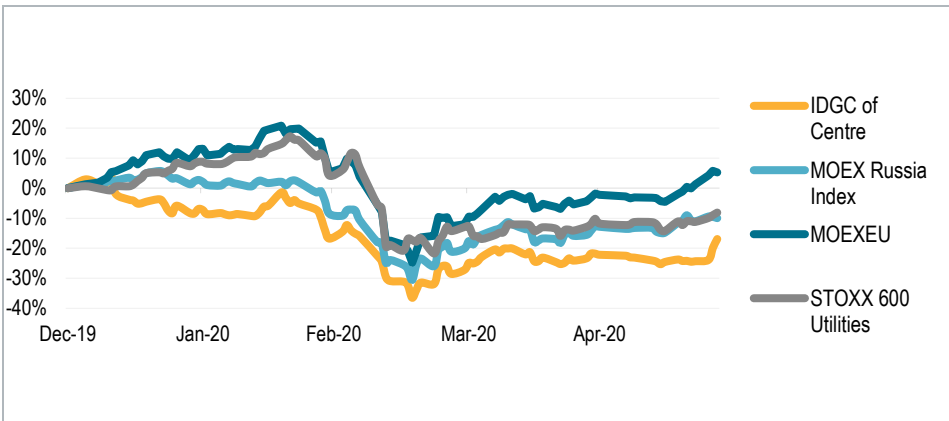
## COMPANY NEWS

### Igor Makovskiy: Rosseti Centre and Rosseti Centre and Volga Region expand the use of artificial intelligence to interact with consumers and scale it to 20 regions of the country

Rosseti Centre and Rosseti Centre and Volga Region have started the implementation of the project "Robotic processing of telephone calls" ("Robot Operator"). The project provides for the introduction in the Contact Centre of the energy companies of the technology of communication with consumers using an automated voice agent that will inform them on issues related to activities of the Companies and receive feedback.

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

## CHANGES OF KEY INDEXES AND SHARES OF THE COMPANY



World indexes	Value	Change	
		per day	fr 31.12.19
MOEX Russia	2741,02	-0,47%	-10,01%
S&P 500	2998,22	0,22%	-7,20%
FTSE 100	6144,25	1,26%	-18,54%
Nikkei	21419,23	0,70%	-9,46%
Sensex	31605,22	3,25%	-23,39%
CSI300	3845,61	-0,70%	-6,13%
Bovespa	86833,3	1,60%	-24,91%

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

Currency rates	Value	Change	
		per day	fr 31.12.19
USD/RUB	71,1408	-0,64%	14,92%
EURO/RUB	77,7854	-0,12%	12,18%

Source: Central Bank of Russia, Company calculations

Liquidity	IDGC of Centre	IDGC of Centre & Volga Region
Number of transactions, pcs.	2574	4442
Trading volume, ₺ mln	33,0	103,1
Trading volume, mln pcs.	124,8	539,6
Average trading volume over the last 30 days, mln pcs.	25,5	92,4
% of the authorized capital	0,30%	0,48%

Source: MOEX, Company calculations

Shares	Price**, ₺	MCap**, ₺ bln	MCap**, \$ mln
IDGC of Centre	0,2634	11,12	156,31
IDGC of Centre & Volga Reg	0,1949	21,96	308,75

Source: MOEX, Company calculations

Comparison with indexes	Change	
	per day	fr 31.12.19
STOXX 600 Utilities	0,91%	-8,10%
MOEXEU	-0,47%	5,30%
IDGC of Centre**	3,62%	-16,91%
IDGC of Centre & Volga Region**	6,79%	-18,45%

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

Grid companies	Change**	
	per day	fr 31.12.19
Rosseti, ordinary shares	-2,02%	13,92%
FGC UES	-1,71%	-4,23%
IDGC of Volga	-1,35%	-26,03%
MOESK	-1,91%	-3,06%
Rosseti Northern Caucasus	0,53%	-12,27%
IDGC of North-West	1,06%	-1,50%
IDGC of Urals	-1,84%	3,52%
IDGC of Siberia	15,49%	-17,96%
Rosseti South	0,69%	-17,03%
Lenenergo, ordinary shares	-0,63%	-11,08%
TRK, ordinary shares	13,75%	-1,86%
Kubanenergo	1,34%	7,23%

Source: MOEX, Company calculations

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

### IDGC of Centre, PJSC

119017, Moscow, Malaya Ordynka St., 15

### Corporate Governance Department

+7 (495) 747 92 92, ext. 33-34

[ir@mrsk-1.ru](mailto:ir@mrsk-1.ru)

### Tickers

Moscow Exchange (MOEX)

Bloomberg

Reuters

[MRKC](#)

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