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Key Global Indices

	Last Close	1D% Chg	5D% Chg	1M% Chg	1Y% Chg		Last Close	1D% Chg	5D% Chg	1M% Chg	1Y% Chg
FTSE 100	7,396.3	↑ 0.9%	1.2%	1.0%	6.4%	S&P 500	3,133.6	↑ 0.8%	0.4%	3.7%	19.0%
FTSE 250	20,703.2	↑ 1.1%	1.3%	3.0%	11.7%	DJIA	28,066.5	↑ 0.7%	0.1%	4.1%	15.6%
DJSTOXX 50	3,355.7	↑ 1.0%	0.5%	2.1%	16.1%	Nasdaq	8,632.5	↑ 1.3%	1.0%	4.7%	24.4%
FTSEurofirst 300	1,598.0	↑ 1.0%	0.5%	2.3%	14.7%	Nikkei 225*	23,373.0	↑ 0.3%	-0.5%	2.2%	7.6%
German DAX 30	13,246.5	↑ 0.6%	0.3%	2.7%	18.3%	Shanghai Composite*	2,906.1	↓ -0.003%	-0.8%	-1.7%	12.7%
France CAC 40	5,924.9	↑ 0.5%	-0.1%	3.5%	19.8%	DJIA at London close	28,006.0				*Time - GMT 04:30

FTSE 100



UK Market Snapshot

UK markets closed in the green yesterday, led by gains in financial and banking sector stocks. Direct Line Insurance Group advanced 2.8%, after a leading broker raised its target price on the stock to 350.0p from 335.0p. International Consolidated Airlines Group gained 1.9%, after the company's unit British Airways reached a preliminary deal with its pilots' union to end a pay dispute. AstraZeneca rose 1.6%, following a rating upgrade on the stock to 'Buy' from 'Neutral'. On the contrary, Restaurant Group plunged 8.8%, after its noodle chain Wagamama reported a slower growth in its like-for-like sales for the second quarter. Softcat dropped 2.7%, following a rating downgrade on the stock to 'Hold' from 'Buy'. Euromoney Institutional Investor fell 1.7%, after announcing a deal to acquire data provider, Wealth-X, for \$20.4 million. The FTSE 100 advanced 0.9%, to close at 7,396.3, while the FTSE 250 rose 1.1%, to end at 20,703.2.

US Market Snapshot

US markets closed higher yesterday, boosted by gains in technology and industrial sector stocks. NVIDIA advanced 4.9%, after a leading broker upgraded its rating on the stock to 'Overweight' from 'Equal Weight'. Charles Schwab gained 2.3%, following an agreement to acquire its rival TD Ameritrade Holding, up 7.6%, for \$26.0 billion. eBay added 2.1%, after announcing a deal to sell its ticket marketplace, StubHub, to Swiss-based rival, Viagogo, for \$4.0 billion. General Electric rose 0.3%, after the company appointed Carolina Dybeck Happe as its Chief Financial Officer. On the flipside, Jacobs Engineering Group declined 2.8%, despite reporting better than expected revenue and profit for the fourth quarter. Uber Technologies dropped 1.5%, after the company lost its license to operate in London, amid safety concerns. The S&P 500 gained 0.8%, to settle at 3,133.6. The DJIA rose 0.7%, to settle at 28,066.5, while the NASDAQ added 1.3%, to close at 8,632.5.

Europe Market Snapshot

European markets finished in positive territory yesterday, supported by gains in technology and healthcare sector stocks. Siemens Gamesa Renewable Energy surged 8.5%, after the company awarded a two-year contract to Nexans, up 1.8%, to supply cables for wind turbines. LVMH Moet Hennessy Louis Vuitton gained 2.0%, after announcing a deal to acquire US-based luxury jeweller, Tiffany, for \$16.2 billion. Sika added 1.4%, after the company agreed to buy Romanian mortar and thermal insulations firm, Adeplast. Linde rose 0.7%, after it signed a memorandum of understanding with Baowu Clean Energy to jointly develop China's hydrogen market for industrial and mobility applications. On the flipside, Thyssenkrupp declined 4.4%, after a top broker downgraded its rating on the stock to 'Neutral' from 'Outperform'. The FTSEurofirst 300 index gained 1.0%, to settle at 1,598.0. The German DAX Xetra rose 0.6%, to settle at 13,246.5, while the French CAC-40 added 0.5%, to close at 5,924.9.

Asia Market Snapshot

Markets in Asia are trading mostly higher this morning. In Japan, Asahi Kasei has gained 1.3%, after the company has offered to buy Danish pharmaceutical company, Veloxis Pharmaceuticals, for \$1.3 billion. Meanwhile, IHI and Shimizu have dropped 2.1% and 3.2%, respectively. In Hong Kong, China Resources Land and AAC Technologies Holdings have declined 1.7% and 2.8%, respectively. Meanwhile, Want Want China Holdings and China Mengniu Dairy have added 1.7% and 2.4%, respectively. In South Korea, POSCO and LG Display have advanced 2.9% and 3.3%, respectively. Meanwhile, Hyundai Mobis and E-MART have fallen 2.0% and 2.3%, respectively. The Nikkei 225 index is trading 0.3% higher at 23,373.0. The Hang Seng index is trading 0.1% down at 26,966.4, while the Kospi index is trading 0.6% higher at 2,136.0.

DJIA



DJ Euro STOXX50



Contents

Key Corporate Releases	2
Commodity, Currency & Bitcoin	3
Sector Performers & Key Economic News	4
Share Tips, Bids & Rumours and Newspaper Summary	5-7

Key Corporate Releases Today

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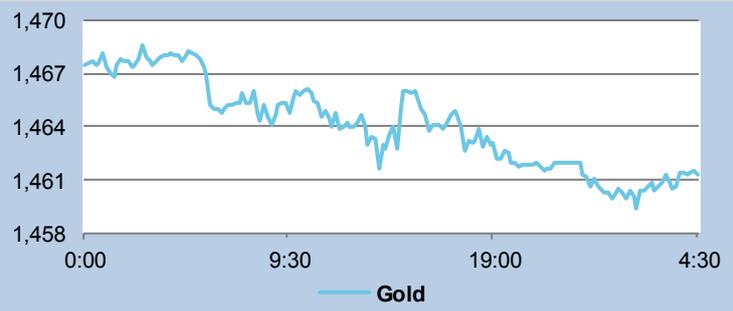
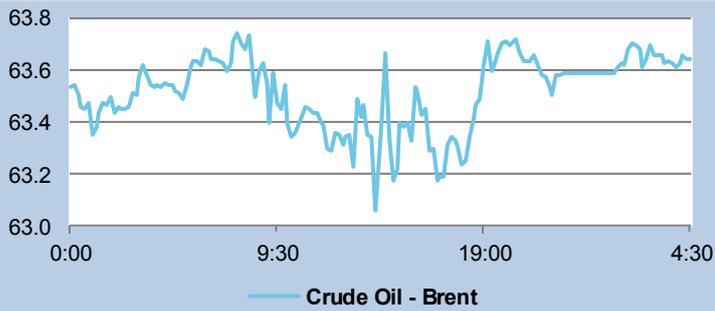
UK

Company Name	Results	Currency	Full Year Consensus	
			Estimated EPS	Estimated Revenue (Mn)
Compass Group Plc	Final	GBP	0.84	25,001.07
Cranswick Plc	Interim	GBP	1.38	1,591.40
Pennon Group Plc	Interim	GBP	0.58	1,437.30
UDG Healthcare Public Limited Company	Interim	USD	0.48	1,283.56
Pets at Home Group Plc	Interim	GBP	0.14	1,020.14
Bank Of Cyprus Holdings	Interim	EUR	0.16	659.00
Victoria PLC	Interim	GBP	0.41	641.50
Renew Holdings Plc	Final	GBP	0.39	595.00
IG Design Group Plc	Interim	GBP	0.32	499.75
De La Rue Plc	Interim	GBP	0.35	499.00
Severfield Plc	Interim	GBP	0.07	310.75
Paragon Banking Group Plc	Final	GBP	0.50	299.00
Topps Tiles Plc	Final	GBP	0.06	215.67
GB Group Plc	Interim	GBP	0.17	195.44
IMImobile Plc	Interim	GBP	0.16	161.00
Revolution Bars Group Plc	Interim	GBP	0.07	155.00
Draper Esprit Plc	Final	GBP	0.67	127.00
Shaftesbury Plc	Final	GBP	0.18	126.67
Treatt Plc	Final	GBP	0.18	113.00
Accsys Technologies Plc	Interim	EUR	(0.04)	89.20
Codemasters Group Holdings Plc	Interim	GBP	0.12	81.38
Ten Lifestyle Group Plc	Final	GBP	(0.08)	40.95
HML Holdings Plc	Interim	GBP	0.05	30.40
Conygar Investment Co Plc/The	Final	GBP	0.15	1.35
Caledonia Investments Plc	Interim	GBP	-	-
LXI REIT Plc	Interim	GBP	-	-
AFI Development Plc	Interim	USD	-	-
Schroder Real Estate Investment Trust Ltd	Interim	GBP	-	-
Augmentum Fintech Plc/Fund	Interim	GBP	-	-
Cardiff Property Plc/The	Final	GBP	-	-
Walker Crips Group Plc	Interim	GBP	-	-
Triad Group Plc	Interim	GBP	-	-
Two Shields Investments Plc	Interim	GBP	-	-
Jaywing Plc	Interim	GBP	-	-
On-Line Blockchain Plc	Final	GBP	-	-
Nakama Group Plc	Interim	GBP	-	-

Note: All Estimates are for Full Year

Commodity, Currency and Bitcoin

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Commodity

- At 0430GMT today, Brent crude oil one month futures contract is trading marginally higher at \$63.66 per barrel, ahead of the American Petroleum Institute's weekly oil inventory data, scheduled to be released later today. Yesterday, the contract climbed 0.41% or \$0.26, to settle at \$63.65 per barrel, amid rising optimism surrounding the US-China trade deal.
- At 0430GMT today, Gold futures contract is trading 0.3% or \$4.30 higher at \$1461.20 per ounce. Yesterday, the contract declined 0.46% or \$6.70, to settle at \$1456.90 per ounce, as a stronger US Dollar and gains in the global equity markets dented the demand appeal of the safe-haven asset.



Currency

- At 0430GMT today, the EUR is trading marginally higher against the USD at \$1.1015, ahead of the German consumer confidence index data for December, due in a few hours. Additionally, investors await the US consumer confidence index data for November and new home sales data for October, scheduled later today. Yesterday, the EUR weakened 0.06% versus the USD, to close at \$1.1014, after the German business expectations index advanced less than expected in November. Meanwhile, the German business climate index rose as anticipated in November. In other economic news, the US Chicago Fed national activity index surprisingly fell in November, whereas the Dallas Fed manufacturing business index unexpectedly rose in the same month.
- At 0430GMT today, the GBP is trading marginally lower against the USD at \$1.2897, ahead of the UK BBA mortgage approvals data for October, due in a few hours. Yesterday, the GBP strengthened 0.51% versus the USD, to close at \$1.2900.



Bitcoin

- At 0430GMT today, BTC is trading 0.06% higher against the USD at \$7218.35. Yesterday, BTC declined 1.76% against the USD to close at \$7214.30. In major news, MV Index Solutions has launched the MVIS CryptoCompare Institutional Bitcoin Index, developed in partnership with the global cryptocurrency market data provider, CryptoCompare, to measure the performance of digital assets portfolio. In a key development, US-based software maker, CryptoTrader.Tax has introduced a new product which enables tax firms and tax professionals to assist their clients with cryptocurrency tax reporting.

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UK Top Sector Performers

Sector	Current Price	1D Change	1D (%) Change	1M (%) Change	1Y (%) Change
Industrial Metals	3477.30	105.75	3.1%	-1.2%	-20.9%
Industrial Engineering	12998.50	292.83	2.3%	11.8%	22.9%
Electronic & Electrical Equipment	8468.21	189.49	2.3%	13.0%	36.1%
Health Care Equipment & Services	8219.43	164.54	2.0%	3.3%	15.4%
General Retailers	2323.40	44.18	1.9%	1.8%	7.3%

UK Worst Sector Performers

Sector	Current Price	1D Change	1D (%) Change	1M (%) Change	1Y (%) Change
Oil & Gas Producers	8337.64	-2.47	-0.03%	-2.6%	-2.0%

Key Economic News

German Ifo current assessment index advanced in November

In Germany, the Ifo current assessment index advanced to a level of 97.90 in November, compared to a reading of 97.80 in the prior month. Market anticipation was for the index to advance to a level of 98.00.

German Ifo business expectations index climbed in November

In Germany, the Ifo business expectations index advanced to a level of 92.10 in November, lower than market expectations of a rise to a level of 92.50. In the previous month, the index had registered a revised to a level of 91.60.

German Ifo business climate index rose in November

In Germany, the Ifo business climate index registered a rise to a level of 95.00 in November, compared to a revised to a level of 94.70 in the prior month. Markets were anticipating the index to rise to a level of 95.00.

US Dallas Fed manufacturing business index unexpectedly rose in November

In the US, the Dallas Fed manufacturing business index registered an unexpected rise to a level of -1.30 in November, compared to a reading of -5.10 in the prior month. Market expectation was for the index to fall to a level of -11.30.

US Chicago Fed national activity index surprisingly declined in November

In the US, the Chicago Fed national activity index fell unexpectedly to a level of -0.71 in November, compared to a reading of -0.45 in the prior month. Market expectation was for the index to rise to a level of -0.43.

Share Tips, Bids and Rumours

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- [The Times \(Tempus share tips\)](#): “Hold” Assura; “Avoid” Spirent.
- [The Guardian](#): LVMH, the world’s biggest luxury group, is to take over Tiffany & Co, the U.S. jeweller famed for its engagement rings and white diamond necklaces, in a \$16.2 billion deal.
- [The Daily Telegraph](#): U.S. broking giant Charles Schwab will buy rival TD Ameritrade in an all-share deal worth \$26 billion.
- [The Daily Telegraph](#): Viagogo, the ticket reseller condemned by MPs for its misleading sales practices, is buying rival site StubHub from its owner eBay for \$4 billion.
- [The Times](#): Royal Dutch Shell has suffered a setback in its push into green energy after losing out to Mitsubishi in the €4 billion battle for a Dutch power utility, Eneco.
- [Financial Times](#): MTS, Russia’s largest mobile operator, has sold its Ukrainian operations as it vowed to double down on attempts to capture more of the country’s fast-growing domestic digital market.
- [The Daily Telegraph \(Comment\)](#): How Uber’s licence battles in London could be nothing compared with its troubles worldwide.

Newspaper Summary

The Times

Ex-Barclays Executive Roger Jenkins tells court he was ‘close’ to Qatar’s PM: A former senior Executive at Barclays became “close” to the Prime Minister of Qatar before the Gulf state invested in the British bank to stave off a government bailout in 2008, a court was told.

New York power struggle ends in defeat for National Grid: National Grid has agreed to pay \$36 million to end a dispute over gas supplies in New York after the state’s governor threatened to strip it of its licence to operate.

Alstom fined £15 million for bribery over Tunisian metro: The British division of Alstom must pay £16.4 million after being convicted of paying bribes to win a contract to supply trams to the metro system in Tunis.

Naspers under pressure to put more cash on table in Just Eat deal: The South African technology group attempting to gatecrash a recommended takeover of Just Eat is under mounting pressure to up the ante after its cash offer was dismissed as “wholly inadequate”.

Neil Woodford’s demise a nail in the coffin for liquidity in Aim, warns Finncap Chief Sam Smith: The collapse of Neil Woodford’s investment empire has drained liquidity from Aim, the market for small companies, and has made investors wary of thinly traded shares, a leading stockbroker has warned.

Wagamama grows at slower pace: Wagamama continues to spice up the performance of The Restaurant Group, although the rate of like-for-like sales growth in its core U.K. business slowed in the second quarter.

Polar Capital feels the chill after merging Japanese funds: An asset management firm has been hit by almost £450 million of net outflows after it closed one of its Japan-focused funds and after a long-term client withdrew money from its two main portfolios.

The Independent

TSB to cut 400 jobs as 82 bank branches close next year: Up to 400 jobs could be at risk as more than 80 TSB branches across the country are set to close their doors next year, the bank announced in another blow to the U.K. high street.

Mike Ashley’s House of Fraser removes fur products after customer backlash: Fur has been removed from House of Fraser’s stores after consumers voiced anger at the department store’s reintroduction of products that campaigners say lead to animal cruelty.

Financial Times

National Grid lifts ban on gas customers in New York: National Grid has agreed to lift a ban on connecting new customers in southern areas of New York to the local gas grid after the city’s governor threatened to revoke its operating licence.

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Consolidation in gold industry resumes as Kirkland Lake approaches Detour: The consolidation of the gold sector resumed with Canada’s Kirkland Lake Gold making a \$3.7 billion all-share offer for rival Detour Gold.

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GE names Maersk executive as Chief Financial Officer: General Electric has named an executive of shipping group AP Moller-Maersk as its new Chief Financial Officer, in the second big appointment of an outsider in just over a year as the U.S. industrial group attempts to revive itself.

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Mitsubishi-led consortium to buy Eneco for €4.1 billion: A Mitsubishi-led consortium has agreed to pay €4.1 billion for Dutch utility Eneco in an all-cash deal that beat rival offers from Royal Dutch Shell and private equity group KKR.

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Westpac executives forced out by money-laundering scandal: Westpac will close the payments system implicated in one of Australia’s biggest ever money laundering scandals and strip its executives of their short-term bonuses following an accountability review.

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Former Qatari PM wanted to be ‘special gulf guy’ for Barclays, court hears: A senior banker who was “gatekeeper” of

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Barclays' relationship with Qatar has told a London court that the former prime minister of Qatar wanted to be the bank's "special gulf guy".

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TSB to axe at least 15% of branches in cost-cutting drive: TSB will shut at least 15% of its branches while ramping up small business lending and scaling back growth in mortgages in an effort to return the U.K.'s seventh-largest bank to profit.

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Schwab Chief plays down regulatory threat to \$26 billion deal: Charles Schwab Chief Executive Walt Bettinger downplayed concerns that U.S. antitrust regulators will attempt to block his company's \$26 billion takeover of TD Ameritrade after analysts said the deal risked scrutiny in Washington.

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Swiss Re plans natural disaster sales push: Swiss Re is planning a big increase in sales of natural catastrophe insurance despite a series of heavy claims in recent years.

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AIG fights attempt to make it pay \$100 million in bonuses: AIG is heading to the London courts to fight an attempt to make the insurance group pay more than \$100 million in crisis-era bonuses to 23 former staff.

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Lévy prepares for daunting task in new role at WeWork: Maurice Lévy, the Publicis Chairman named WeWork's interim Chief Marketing Officer, said the shared office company faced a daunting challenge but that he expected to spend only a few months in the role.

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EY targets financial consultant cuts as fees dry up: EY has put about 100 jobs in its financial consulting unit at risk of redundancy after a decline in work and a drop-off in fees made from regulatory advice.

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SK Biopharmaceuticals plans to raise \$850 million in IPO: South Korean drug

company SK Biopharmaceuticals is expected to raise more than \$850 million through a planned initial public offering in January, in the country's biggest listing in two years, people close to the deal said.

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Novartis agrees \$9.7 billion deal for U.S. cholesterol drugmaker: Novartis has agreed a \$9.7 billion cash deal to acquire The Medicines Company, betting that the U.S. drugmaker will come good on a new drug designed to control cholesterol levels.

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Alstom U.K. fined £15 million over Tunisian tram contract bribes: Alstom's U.K. business has been fined £15 million for paying bribes to secure a Tunisian tram contract, bringing to a close a decade-long investigation by the Serious Fraud Office.

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VW 'Dieselgate' claims threatened by paperwork: Hundreds of thousands of German drivers who were sold Volkswagen cars fitted with software to cheat diesel emissions tests are in danger of missing out on any form of compensation due to a deluge of paperwork that threatens to bring the country's largest lawsuit to a standstill.

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U.S. fund pressures Japan's TBS to offload assets: A U.S.-based asset manager has launched a campaign to urge one of Japan's largest media groups, Tokyo Broadcasting System, to offload its substantial array of noncore holdings to improve returns for shareholders.

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Alibaba jumps more than 6% in Hong Kong share debut: Shares in Alibaba rose in their Hong Kong trading debut after the ecommerce group raised more than \$11 billion in this year's biggest stock offering, in a move that makes the company's shares much easier to trade among mainland Chinese investors.

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Mike Ashley to change name of Sports Direct to Frasers: Billionaire retail tycoon Mike Ashley is to change the name of Sports Direct to Frasers Group next month

as he seeks to shed the company's bargain basement reputation and image.

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Ebay to sell StubHub to Viagogo for \$4 billion: Ebay, which has come under pressure from activist investors this year, has struck a \$4.05 billion deal to sell its online ticketing subsidiary StubHub to rival reseller Viagogo.

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Jane Shepherdson joins clothing rental start-up: Jane Shepherdson, a fashion executive credited with building Philip Green's Topshop into a global brand, has become Chairman of start-up My Wardrobe HQ in a high-profile boost to the U.K.'s fledgling clothing rental industry.

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LVMH clinches takeover of Tiffany for \$16.6 billion: LVMH has clinched a deal to buy Tiffany & Co for \$16.6 billion, handing control of the upmarket American jeweller to the luxury group controlled by Europe's richest man Bernard Arnault.

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Uber loses licence to operate in London: Uber has been stripped of its London licence for a second time after the U.K. capital's transport regulator again found that the car-booking service was not a "fit and proper" company to operate there.

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MTS sells Ukrainian unit as it focuses on Russia: MTS, Russia's largest mobile operator, has sold its Ukrainian operations as it vowed to double down on attempts to capture more of the country's fast-growing domestic digital market.

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Lex:

Schwab/Ameritrade: imperilling Merrill: The opportunity is not about helping clients trade but helping them invest more broadly.

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Novartis/Medco: the fat of the lands: Prospering Chinese and Indian citizens could constitute a lucrative market.

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Big Four/government: no freeze on fees: Central government is the country's biggest spender on consultancy services but value for money is far from assured.

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Lombard:

Uber must ride its luck in court of public opinion: London cab drivers' opinions — according to cliché — are all too predictable. But so are everyone's when it comes to who can drive a cab in London. News that Uber, the app-based ride-hailing service, has been stripped of its London licence for a second time was met with familiar responses.

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The Daily Telegraph

Brokerage giant Charles Schwab to buy rival in \$26 billion deal: U.S. broking giant Charles Schwab will buy rival TD Ameritrade in an all-share deal worth \$26 billion (£20 billion).

CityFibre tries to break free of Vodafone handcuffs: One of BT's challengers in the race to upgrade Britain to full-fibre broadband is attempting to tear up its exclusive partnership with Vodafone as part of a bid by its new owners to accelerate progress.

Tech giants have become the new 'too big to fail': Competition may be a click away, but structural reasons stop the majority from exercising that right

StubHub is just the ticket for Viagogo after \$4 billion swoop: Viagogo, the ticket reseller condemned by MPs for its misleading sales practices, is buying rival site StubHub from its owner eBay for \$4 billion (£3 billion).

Prosus under fire for trying to get Just Eat 'on the cheap': A suitor for Just Eat has attacked a rival bid as "wholly inadequate" and an attempt to buy the British delivery company "on the cheap".

Yacht maker Sunseeker embroiled in legal row after boat is 'arrested' in Florida: A 74ft Sunseeker was 'arrested' by U.S. marshals at the Fort Lauderdale boat show

Daily Mail

Lift-off for British Airways-owner IAG after it secures a pilot pay deal to ward off threat of Christmas strikes: The disagreement over pilots' pay led to the first strikes in BA's history in September - which cancelled 2,325 flights and cost IAG around £121 million. Balpa has recommended a deal worth 12% over three years to its members, and the deal also agrees to improve working conditions and rostering. Members of the union still need to vote it through, but the City seems optimistic, with shares in IAG rising 1.9%, or 10.6p, to 565.8p.

Head of magazine publisher Future scoops bonus worth £18 million after hitting targets on profits and stock price: Zillah Byng-Thorne, 45, is expected to be handed about 1.24 million shares under a performance-related scheme. Future publishes 132 titles including Classic Rock, Four Four Two and Total Film.

Former WH Smith head Stephen Clarke handed a £3.4 million farewell pay packet after successfully driving up shares: Clarke, who stepped down as Chief Executive at the end of October, saw his total pay for the year to August 31 rise jump by 18.6% from a £2.9 million deal in the previous year.

Unilever insists tea brand is not for sale and it is looking for ways to boost sales: The comments came after the consumer goods giant, which also owns Marmite, reportedly told investors that it wanted to 'be rid' of its black tea businesses because of changing customer tastes.

The Scotsman

Arran-based whisky firm toasts £25 million in financing: Whisky producer Isle of Arran Distillers has benefited from a £25 million funding package provided by banking giant Barclays.

Venison supplier Highland Game agrees Gousto deal: Dundee-based wild venison supplier Highland Game has secured a new partnership with recipe box firm Gousto, and boosted distribution with U.K. wholesale partners -Costco, Booker and Brakes worth almost £2 million in sales to the company over the next 12 months.

East Lothian entrepreneur launches 'death tech' digital information vault: An East Lothian based serial entrepreneur has launched an online "death tech" service – a secure digital "vault" that can hold important documents, account details, memories and post-life wishes.

Aberdeen-headquartered EnerMech names replacement Chief: Mechanical and electrical services specialist EnerMech has named industry heavyweight Chris Brown as its new Chief Executive.

Scottish tech sector lagging behind as London dominates: Scotland's technology sector is lagging behind the U.K. according to a report out which highlights the dominance of London and the South East.

Glasgow data firm plans to increase headcount five-fold: A Glasgow-based data analytics company is looking to grow its team five-fold in the next five years as it targets small and medium-sized enterprises (SMEs) with its software-as-a-service offering.

OroGin Distillery and The George hotel roll out exclusive gin: Lockerbie's OroGin Distillery Company has teamed up with a luxury Edinburgh hotel to launch an exclusive gin brand.

Love launches 'revolutionary' scheme to recruit care workers: A Hamilton care provider has launched a "revolutionary" employment scheme designed to give young people and armed forces veterans the opportunity to work in the care sector.

Starbucks signs up for £1.4 million Glasgow store: Starbucks has signed a 15-year lease on a £1.4 million development at Hillington Park business estate outside Glasgow.

Emiliano Sala case highlights 'insider' cybersecurity threat - Neeraj Thomas: The imprisonment of two people who shared images of late footballer Emiliano Sala acts as a warning to businesses, writes Neeraj Thomas, of law firm CMS.

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