

Key Global Indices

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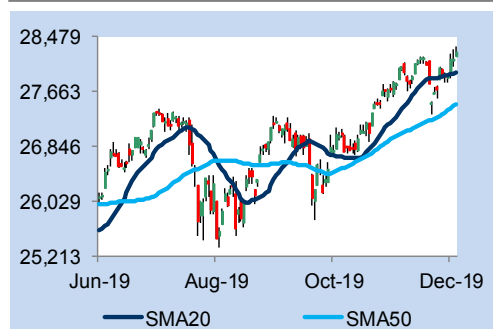
	Last Close	1D% Chg	5D% Chg	1M% Chg	1Y% Chg		Last Close	1D% Chg	5D% Chg	1M% Chg	1Y% Chg		
FTSE 100	7,519.1	↑	2.3%	3.9%	3.0%	9.8%	S&P 500	3,191.5	↑	0.7%	1.8%	2.3%	22.8%
FTSE 250	21,920.7	↑	1.9%	4.8%	7.4%	24.1%	DJIA	28,235.9	↑	0.4%	1.2%	0.8%	17.2%
DJSTOXX 50	3,410.8	↑	1.4%	2.6%	2.2%	19.9%	Nasdaq	8,814.2	↑	0.9%	2.2%	3.2%	27.5%
FTSEurofirst 300	1,628.6	↑	1.3%	2.6%	2.4%	18.7%	Nikkei 225*	24,067.0	↑	0.5%	2.2%	2.8%	12.1%
German DAX 30	13,407.7	↑	0.9%	2.3%	1.3%	23.4%	Shanghai Composite*	3,013.2	↑	1.0%	1.9%	3.2%	15.1%
France CAC 40	5,991.7	↑	1.2%	2.6%	0.9%	23.4%	DJIA at London close	28,309.8	*Time - GMT 04:30				

*Time - GMT 04:30

FTSE 100



DJIA



DJ Euro STOXX50



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UK Market Snapshot

UK markets finished closed higher yesterday, led by gains in banking and mining sector stocks. Sports Direct International skyrocketed 31.2%, after the sportswear retailer reported a jump in its revenue and pretax profit for the first half of 2019. Barclays climbed 5.5%, after a leading broker raised its target price on the stock to 244.0p from 209.0p. Cineworld Group gained 2.5%, after the company announced its plan to acquire Canadian cinema chain, Cineplex, for \$2.1 billion. On the contrary, Nostrum Oil & Gas plummeted 14.2%, after announcing the departure of its Chief Executive Officer, Kai-Uwe. Tullow Oil plunged 10.2%, following a rating downgrade on the stock to 'Reduce' from 'Hold'. Pearson dropped 0.9%, after a top broker lowered its target price on the stock to 525.0p from 620.0p. The FTSE 100 advanced 2.3%, to close at 7,519.1, while the FTSE 250 rose 1.9%, to end at 21,920.7.

US Market Snapshot

US markets closed in the green yesterday, boosted by gains in healthcare and technology sector stocks. WW International advanced 3.1%, following reports that the company has extended its partnership with Oprah Winfrey till 2025. Goldman Sachs Group gained 1.4%, after a top broker upgraded its rating to 'Buy' from 'Neutral'. On the flipside, PG&E plunged 14.0%, after California Governor, Gavin Newsom, rejected the utility's bankruptcy reorganisation plan and suggested it to make significant changes to its bankruptcy proposal. International Flavors & Fragrances plummeted 10.4%, after reports indicated that the company agreed to merge with DuPont de Nemours' nutrition and bio-sciences division. Boeing declined 4.3%, after it indicated that it is planning to suspend production of its beleaguered 737 Max planes next month. The S&P 500 rose 0.7%, to settle at 3,191.5. The DJIA added 0.4%, to settle at 28,235.9, while the NASDAQ added 0.9%, to close at 8,814.2.

Europe Market Snapshot

European markets finished in positive territory yesterday, supported by gains in healthcare and technology sector stocks. Healthcare companies, Novartis, Roche Holding and Sanofi rose 0.4%, 1.2% and 1.6%, respectively. Siemens Gamesa Renewable Energy climbed 3.8%, after the Spanish wind turbine maker won a wind turbine supply contract in Sweden. Hennes & Mauritz advanced 2.2%, after the Swedish retailer posted a jump in its net sales for the fourth quarter. On the flipside, Electrolux plunged 10.6%, after the Swedish appliance maker forecasted a decline in its fourth quarter earnings, amid delivery disruptions in its North American division. Volkswagen dropped 0.8%, after the German car manufacturer announced its decision to halt all its activities in Algeria until further notice. The FTSEurofirst 300 index gained 1.3%, to settle at 1,628.6. The German DAX Xetra rose 0.9%, to settle at 13,407.7, while the French CAC-40 added 1.2%, to close at 5,991.7.

Asia Market Snapshot

Markets in Asia are trading higher this morning, tracking overnight gains from Wall Street. In Japan, Nomura Holdings, Inpex and Tosoh have advanced 1.1%, 3.7% and 5.0%, respectively. Meanwhile, Chiyoda, Amada Holdings and Dentsu have dropped 1.7%, 1.9% and 5.7%, respectively. In Hong Kong, PetroChina, CNOOC and Tencent Holdings have gained 2.1%, 2.9% and 3.2%, respectively. Meanwhile, Sun Hung Kai Properties, New World Development and CK Infrastructure Holdings have declined 0.7%, 1.3% and 1.5%, respectively. In South Korea, Hyundai Motor, Celltrion and SK Hynix have climbed 2.5%, 3.8% and 4.4%, respectively. Meanwhile, SK Holdings, Hyundai Engineering & Construction and KB Financial Group have slipped 1.2%, 1.7% and 2.5%, respectively. The Nikkei 225 index is trading 0.5% higher at 24,067.0. The Hang Seng index is trading 1.1% up at 27,815.2, while the Kospi index is trading 1.1% higher at 2,191.5.

Key Corporate Releases Today

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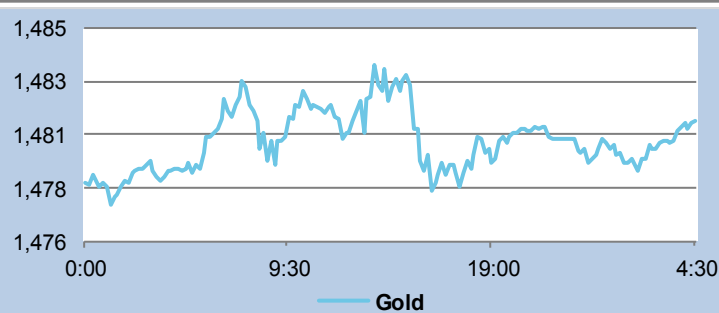
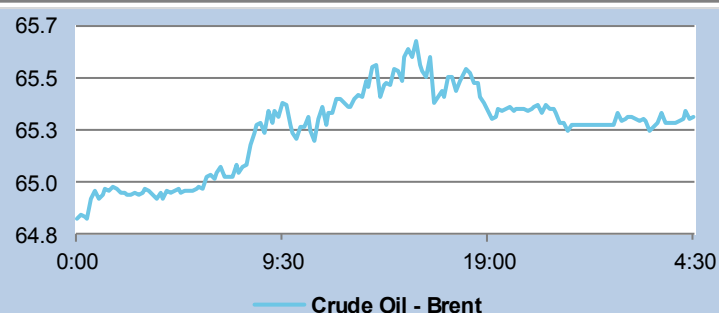
UK

Company Name	Results	Currency	Full Year Consensus	
			Estimated EPS	Estimated Revenue (Mn)
Carpetright Plc	Interim	GBP	-	377.00
Fulcrum Utility Services Ltd	Interim	GBP	0.02	47.75
SDI Group Plc	Interim	GBP	0.04	25.10
Pressure Technologies Plc	Final	GBP	0.08	24.10
Byotrol Plc	Interim	GBP	-	4.20
Summit Therapeutics Plc	Q3	GBP	(0.17)	1.64
Bilby Plc	Interim	GBP	-	-
Evgen Pharma Plc	Interim	GBP	(0.02)	-
Carclo Plc	Interim	GBP	-	-
Triad Group Plc	Interim	GBP	-	-
Jaywing Plc	Interim	GBP	-	-
Toople Plc	Final	GBP	-	-
Kazera Global Plc	Final	GBP	-	-
Trafalgar Property Group Plc	Interim	GBP	-	-

Note: All Estimates are for Full Year

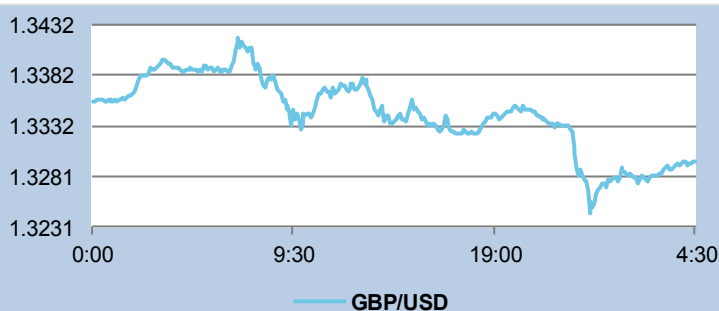
Commodity, Currency and Bitcoin

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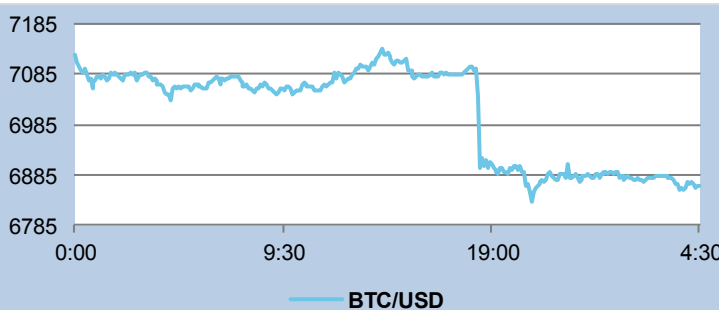
Commodity

- At 0430GMT today, Brent crude oil one-month futures contract is trading marginally lower at \$65.33 per barrel, ahead of the American Petroleum Institute's weekly oil inventory data, scheduled to be released later today. Yesterday, the contract climbed 0.18% or \$0.12, to settle at \$65.34 per barrel, amid positive development in the US-China trade deal. Meanwhile, the Energy Information Administration's (EIA) forecasted that the US oil production will rise by 30,000 barrels a day in January.
- At 0430GMT today, Gold futures contract is trading 0.41% or \$6.10 higher at \$1481.10 per ounce. Yesterday, the contract declined 0.04% or \$0.60, to settle at \$1475.00 per ounce, following a phase one trade agreement between the US and China.



Currency

- At 0430GMT today, the EUR is trading marginally higher against the USD at \$1.1147, ahead of the Euro-zone trade balance data for October, due in a few hours. Additionally, investors await the US housing starts data and industrial production data, both for November, slated to be released later today. Yesterday, the EUR strengthened 0.21% versus the USD, to close at \$1.1144, after the Euro-zone services PMI advanced in December. Meanwhile, the German and Euro-zone manufacturing PMIs unexpectedly dropped in December. In other economic news, the US services PMI unexpectedly rose in December, while the nation's manufacturing PMI declined in the same month.
- At 0430GMT today, the GBP is trading 0.27% lower against the USD at \$1.3296, ahead of the UK ILO unemployment rate for October, due in a few hours. Yesterday, the GBP strengthened marginally versus the USD, to close at \$1.3332. On the data front, the UK services PMI surprisingly declined in December, while the nation's manufacturing PMI unexpectedly fell to its lowest level since July 2012 in the same month.



Bitcoin

- At 0430GMT today, BTC is trading 0.18% lower against the USD at \$6864.04. Yesterday, BTC declined 5.03% against the USD to close at \$6876.58. In major news, Coincheck announced its decision to suspend its leverage trading on its platform. In another key development, Tata Consultancy Services has recently unveiled a blockchain app development kit, Quartz DevKit, which enables its users to quickly build and deploy applications on any chosen blockchain in a simplified way.

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FTSE All Share Index- Performance

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UK Top Sector Performers

Sector	Current Price	1D Change	1D (%) Change	1M (%) Change	1Y (%) Change
Tobacco	33743.46	1285.42	4.0%	9.8%	7.6%
Life Insurance	8207.70	297.15	3.8%	8.4%	21.1%
Industrial Metals	3665.84	132.67	3.8%	9.0%	-15.6%
Oil Equipment & Services	8340.35	279.67	3.5%	2.6%	-26.0%
Electricity	8532.01	249.27	3.0%	11.1%	28.6%

Key Economic News

UK services PMI surprisingly slid in December

In the UK, the flash services PMI unexpectedly dropped to a level of 49.00 in December. In the prior month, the services PMI had registered to a reading of 49.30.

UK manufacturing PMI unexpectedly dropped in December

In the UK, the flash manufacturing PMI unexpectedly dropped to a level of 47.40 in December, compared to a reading of 48.90 in the prior month. Markets were expecting the manufacturing PMI to rise to a level of 49.40.

Euro-zone manufacturing PMI unexpectedly dropped in December

In the Euro-zone, the flash manufacturing PMI unexpectedly eased to a level of 45.90 in December, compared to a reading of 46.90 in the prior month. Market expectation was for the manufacturing PMI to climb to a level of 47.10.

Euro-zone services PMI climbed in December

In the Euro-zone, the preliminary services PMI recorded a rise to a level of 52.40 in December, compared to a level of 51.90 in the prior month. Markets were expecting services PMI to advance to a level of 52.00.

US housing market index surprisingly rose in December

In the US, the housing market index advanced unexpectedly to a level of 76.00 in December, compared to a revised level of 71.00 in the prior month. Market anticipation was for the index to drop to a level of 70.00.

US Markit manufacturing PMI declined in December

In the US, the preliminary Markit manufacturing PMI registered a drop to a level of 52.50 in December, compared to a level of 52.60 in the prior month. Market anticipation was for the Markit manufacturing PMI to fall to a level of 52.40.

US Markit services PMI unexpectedly rose in December

In the US, the preliminary Markit services PMI unexpectedly climbed to a level of 52.20 in December, compared to a level of 51.60 in the previous month. Markets were anticipating Markit services PMI to drop to a level of 51.40.

RBA Minutes: Policymakers consider further easing of monetary policy

Minutes of the Reserve Bank of Australia's (RBA) December meeting indicated that policymakers consider reassessing its economic outlook in February 2020 in order to decide further necessary measures accordingly. Moreover, the central bank expressed concerns that enhanced borrowing could prove to be an obstacle in its plan to exceed wages growth.

Share Tips, Bids and Rumours

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- [The Times \(Tempus share tips\)](#): “Hold” Witan Investment Trust; “Buy” Inchcape.
- [The Guardian](#): FirstGroup is considering a sale of all its North American businesses to focus primarily on its U.S. bus operations.
- [The Daily Telegraph](#): Uber is nearing a deal to sell its Indian food delivery business to a local competitor Zomato.

Newspaper Summary

The Times

Two Serco heads charged with fraud in prison tagging contract: The Serious Fraud Office has charged two former Serco Directors with fraud in relation to the company’s prison tagging contract with the Ministry of Justice.

Renault ‘sacked head Thierry Bolloré after attack on Nissan’: Renault’s alliance with Nissan is under fresh scrutiny amid claims that the French carmaker sacked its Chief Executive for highlighting “critical problems” at the Japanese group.

Franco Manca plans to expand internationally: The restaurant group behind the Franco Manca and Real Greek chains is in talks with potential partners about establishing one of the brands internationally.

Centamin holds talks with suitor: A £1.5 billion takeover of Centamin has moved a step closer after the Chairman of the Egypt-focused gold company met the head of its Canadian suitor to begin talks.

Profits are a bright new look at H&M: The Swedish fashion retailer H&M has reported a 9% rise in fourth-quarter sales to SKr61.7 billion (£4.9 billion), putting it on course to increase annual profits for the first time in four years following heavy investment in online and other services to adapt to a changing market.

Downgrade sends Pearson to bottom of the class: Britain’s premier share index may have enjoyed its best session in almost three and a half years, but it still proved a testing day for Pearson.

The Independent

Jeff Bezos momentarily beaten as richest man in world by Bernard Arnault: For a brief and fleeting moment, Amazon CEO Jeff Bezos was dethroned from his perch atop the world’s richest people’s list,

as luxury goods CEO Bernard Arnault saw his net worth skyrocket.

Hundreds of Post Office workers ‘vindicated’ by High Court ruling over faulty IT system that left them bankrupt and in prison: Hundreds of former Post Office workers who claimed a faulty IT system led to some of them being prosecuted and others going bankrupt due to cash shortfalls have been “vindicated” after a High Court ruling in their favour.

Water firms told to cut average bill by £50: Water companies in England and Wales have been told to cut the average household bill by £50 over the next five years.

Monzo overdraft rate: App-based bank joins HSBC, Nationwide and others in hiking interest: Monzo, the app-based bank, has become the latest lender to announce a significant hike to its overdraft rate, depending on the credit scores of its customers.

Financial Times

Tech giants sued over child deaths in DRC cobalt mining: Apple, Google, Microsoft, Dell and Tesla have been sued by a human rights group on behalf of families of children killed or injured while mining the cobalt in the Democratic Republic of Congo that is used in their products.

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China’s State Grid to buy 49% stake in Oman Electricity: China’s State Grid has agreed to buy a 49% stake in Oman’s Electricity Holding Company, signalling a renewed push by the world’s largest utility to strike big-ticket deals for overseas assets.

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Water rates set to fall after regulatory shake-up: Water companies are facing the biggest clampdown since privatisation three

decades ago after the industry regulator imposed strict limits on investor payouts.

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Goldman unveils Blackstone-like investments group: Goldman Sachs has unveiled a Blackstone-like alternative investments group, previewing a key element of the strategic plan to be presented at the company’s much-anticipated investor day next month.

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UBS to wind down unit for the super-rich: The new co-head of global wealth management at UBS plans to break up the Swiss bank’s dedicated unit for the ultra-wealthy, in an overhaul designed to increase higher-margin lending to some of the world’s biggest family offices.

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Corporate insolvencies set to rise, says credit insurer: The number of big corporate insolvencies surged in the third quarter as the global economic slowdown started to bite.

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London Stock Exchange extends senior management team revamp: The London Stock Exchange Group is to tackle underperformance at its trading technology subsidiary with a shake-up that will see the departure of the group’s Chief Operating Officer.

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Purdue payments to certain Sacklers hit \$10 billion over a decade: Some members of the Sackler family who owned stakes in OxyContin maker Purdue Pharma withdrew more than \$10 billion from the company and their generic drug manufacturer Rhodes during the 10-year period that opioids emerged as the biggest health crisis in the U.S., according to an audit filed with a bankruptcy court.

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Boeing to halt 737 Max production in January: Boeing plans to temporarily suspend production of the 737 Max in January, as the company grapples with a lengthy regulatory review that has delayed the grounded jet's return to the skies.

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Bloomberg fined €5 million over report of fake news release: Bloomberg has been fined €5 million by French regulators for reporting a fake press release about the construction company Vinci three years ago that sent the group's shares down by almost a fifth.

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Hellman & Friedman nears €2.5 billion AutoScout24 deal: U.S. buyout group Hellman & Friedman is closing in on a deal to buy the car trading business of Germany's Scout24 for more than €2.5 billion, according to people familiar with the discussions.

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Electrolux shares slide as costs of U.S. factory overhaul rise: Electrolux warned it will incur deeper than expected cuts to profitability in 2019 and 2020 from merging some factories in the U.S., a move that has left the world's second-largest maker of consumer appliances unable to fulfil some orders on time.

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IFF-DuPont deal creates \$45 billion flavourings giant: International Flavors & Fragrances agreed to buy DuPont's nutrition and biosciences business for \$26.2 billion, the latest acquisition by the New York company as it seeks to become a major supplier to the consumer goods industry.

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Netflix numbers reveal challenge of overseas streaming: Netflix has lifted the veil on its pace of expansion in different regions, revealing how rapid subscriber growth outside the U.S. has partly been driven by lower revenues per user.

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U.K.-based effects studio Cinesite gets \$112 million financing: A London-based studio that has created special effects for

productions including Marvel's Avengers series and Game of Thrones has secured \$112 million in financing and investment as it sets its sights on international acquisitions.

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NBCUniversal appoints film studio Chief as new CEO: Comcast has named the executive who has overseen its Universal film studio as new Chief Executive of parent NBCUniversal, replacing Steve Burke, who will retire after the upcoming Summer Olympics in Tokyo.

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Uber in talks to sell Indian food delivery business to Zomato: Uber is in talks to sell its food delivery business in India for about \$400 million as it tries to shed loss-making operations and become profitable in 2021, according to people with knowledge of the deal.

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Cineworld to buy Canada's Cineplex in \$2.1 billion deal: Cineworld has announced plans to buy Canadian rival Cineplex in a deal that would make the U.K. cinema group the biggest in North America by number of screens.

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Sports Direct shares soar on 'green shoots' at House of Fraser: Shares in Sports Direct rose more than 30% after the retail group said it expected underlying earnings for the full year to grow, with billionaire founder and Chief Executive Mike Ashley considering a £100 million bonus scheme for employees.

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SoftBank-backed Oyo faces restive Chinese hoteliers: Oyo, the Indian-based hotel group that is one of SoftBank's biggest bets, is facing a backlash in China from disgruntled hotel owners in a dispute over payments.

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Russian web giant Rambler seeks to drop criminal case against Nginx: Russian internet giant Rambler will move to have criminal charges against the makers of the internet's most popular hosting server dropped, the company's board said.

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Apple faces shareholder vote on human rights policies: Apple faces a showdown with activist shareholders over its human rights policies after criticism that it kowtowed to Beijing when it removed a controversial mapping app during the Hong Kong protests.

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Far-right extremists flock to protest messaging app Telegram: Far-right extremists are migrating to the encrypted messaging app Telegram, known for its crucial role in organising recent resistance movements from Hong Kong to Iran, as other mainstream platforms crack down on hate speech.

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FirstGroup weighs sale U.S. school bus and public transit units: FirstGroup has appointed advisers over a potential sale of two of its North American businesses, one month after a share price plunge prompted two major shareholders to urge the U.K. transport group to offload its U.S. assets.

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Lex:

IFF/DuPont: an acquired taste: Projections suggest \$300 million in annual cost savings and \$400 million of revenue benefits.

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Cineworld/Cineplex: Captain North America: Cinema needs consolidation of the kind presaged by this deal.

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Centamin/Endeavour: pyramid scheme: Canadian miner will need to dig deep to sweeten its offer.

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Lombard:

Sport Direct's Ashley has not won vote of confidence yet: Labour Party leader Jeremy Corbyn may regret attacking retail head Mike Ashley, founder of Sports Direct, during the U.K. election campaign. After Labour's heavy defeat, it could do with someone who understands aspiration, workers in northern towns, and the need for rebranding. On Monday, Mr Ashley

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disclosed stronger sales of “premium lifestyle” clothes, a possible £100 million staff bonus scheme, a rebrand to ‘Fraser’s’ — and a verdict of “clueless” on Mr Corbyn. Sports Direct shares rose 30%.

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The Daily Telegraph

Iceland's future is far from chilled as biggest investor sells out: The frozen food retailer's falling like-for-like sales and heavy debt load are a concern for some retail analysts

Dagenham's Hollywood dreams in tatters as developer puts film studio project on ice: With the east London site still conspicuously empty, it looks like a high-end film studio may never be made in Dagenham

Anger as EDF tries to shrink emergency zone around Scottish nuclear plant: The emergency zone around Hunterston B, an ageing nuclear power plant in Scotland, sprawls for more than 2km in every direction. Residents of this zone are regularly given iodine pills to take in the event of a nuclear disaster.

Netflix has had a record-breaking decade – but its hot streak may not last: Netflix, unlike many of its rivals, appears to have little to fall back on if times do get tough.

YouTube moderators suffer PTSD and flashbacks because of hours spent watching child abuse videos: YouTube moderators have revealed they suffered from flashbacks and post traumatic stress disorder after watching hours of child abuse videos.

Apple faces shareholder vote on censorship after China controversies: Apple could be forced to justify why it complies with Chinese government efforts to censor the internet after failing to block a shareholder vote on its human rights policies.

Nuclear fusion start-up backed by Bezos raises \$100 million: A nuclear fusion start-up backed by Amazon Founder Jeff Bezos has raised \$100 million to help develop its technology and build a demonstration power plant.

Daily Mail

Savers who back Neil Woodford-style funds face crackdown on withdrawals under Bank of England proposals: Savers who plough money into funds which buy hard-to-sell illiquid assets, such as property or unlisted shares, should not expect to be able to get their money back instantly at full value, the Bank said.

Property tycoon Nick Candy seeks to up his stake in trendy London gym chain 1Rebel: The 46-year-old (pictured with his wife Australian actor, singer and model Holly Valance) already owns 10% of 1Rebel but reportedly wants to buy another 8%.

OBR says Government's tax and spending plans could see borrowing rise by extra £100billion over the next five years: The OBR says the borrowing increase is mainly due to the changes in the way student loans are calculated and to correcting the level of corporation tax receipts.

Ofwat orders water firms to cut bills by £50 in England and Wales over the next five years and demands £51 billion of upgrades across the network: Water regulator Ofwat has told firms to cut the average household bill by £50. Ofwat has also approved a huge £51billion invest plan for the water sector.

The Scottish Herald

Glasgow-founded recruitment firm set to celebrate 25 years: The jobs market is changing and in world of low unemployment and an uncertain economic background “candidate is king”.

The Scotsman

U.K. energy supplier hit with £1.5 million fine after overcharging: Energy provider iSupply will pay £1.5 million after it overcharged thousands of customers for their energy and kept it from regulator Ofgem.

Anderson Strathern investment arm names new Chief Executive: Anderson Strathern Asset Management, the financial planning and investment firm owned by Scottish legal firm Anderson Strathern LLP,

has hired Graham Clark from Adam & Company as its new Chief Executive.

'Digital Quarter' on old runway at Edinburgh airport could create thousands of jobs: Thousands of jobs could be created by the development of a new ‘Digital Quarter’ at a decommissioned runway site near Edinburgh airport, a report has revealed.

Scotgold flags delays to gold production in Highlands: Scotgold Resources – which is developing a gold and silver mine near Tyndrum – says it is “disappointed” with delays to the Cononish project.

Keenan Recycling expands with Zero Waste Scotland investment: Keenan Recycling, Scotland's largest organic waste recycler, has secured £540,000 from Zero Waste Scotland's Circular Economy Investment Fund.

National Timber Group doubles Grangemouth site as it branches out in Scotland: National Timber Group has revealed plans to further grow its footprint in Scotland after almost doubling the size of its operation in Grangemouth.

EICC set for record sales and profits in 2019: The Edinburgh International Conference Centre (EICC) is on track for achieving record sales and operating profits in 2019 after hosting a string of high-profile conferences – and says it is targeting the areas of sustainability, business development and education.

Loganair launch two new international flights from Edinburgh Airport: Scottish airline Loganair is to launch two new international services to Denmark and Germany as well as increasing its domestic services to the Outer Hebrides.

Boards of listed firms warned as risk of hostile bids rises: Boards of stock market listed firms are being warned to be on their guard after figures showed a significant number of takeover approaches are hostile.

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