

## 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	7,351.1	↑ 0.8%	-0.1%	3.7%	-2.1%	S&P 500	2,977.6	↓ -0.2%	-1.0%	3.8%	2.5%
FTSE 250	19,818.6	↑ 0.2%	-1.3%	2.5%	-3.0%	DJIA	26,891.1	↓ -0.3%	-0.8%	4.3%	1.9%
DJSTOXX 50	3,229.7	↑ 0.7%	0.3%	4.6%	4.9%	Nasdaq	8,030.7	↓ -0.6%	-1.9%	2.6%	0.5%
FTSEurofirst 300	1,535.0	↑ 0.7%	-0.3%	4.4%	1.7%	Nikkei 225*	21,780.0	↓ -1.2%	0.02%	7.8%	-8.3%
German DAX 30	12,288.5	↑ 0.4%	-1.4%	4.8%	-0.8%	Shanghai Composite*	2,929.4	↑ 0.01%	-2.3%	0.9%	4.4%
France CAC 40	5,620.6	↑ 0.7%	-0.7%	4.3%	2.0%	DJIA at London close	26,845.0		*Time - GMT		3:30

## FTSE 100



## DJIA



## DJ Euro STOXX50



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## UK Market Snapshot

UK markets finished in higher yesterday, led by gains in energy and financial sector stocks. Aviva gained 1.0%, after announcing the appointment of Jason Windsor as its new Chief Financial Officer and Executive Director. Micro Focus International rose 0.5%, after a leading broker upgraded its rating on the stock to 'Neutral' from 'Underweight'. On the flipside, Pearson plummeted 14.0%, after it forecasted full year operating profit to be at the lower end of its previous guidance. Imperial Brands plunged 12.9%, after the tobacco giant lowered its annual revenue and earnings outlook, amid a challenging vaping and e-cigarette market in the US. International Consolidated Airlines Group declined 4.0%, after it forecasted a drop in its operating profit for the full year, due to strikes by pilots at British Airways. The FTSE 100 advanced 0.8%, to close at 7,351.1, while the FTSE 250 rose 0.2%, to end at 19,818.6.

## US Market Snapshot

US markets closed lower yesterday, as fresh developments in an inquiry into the impeachment of the US President Donald Trump dented the investor sentiment. NGL Energy Partners declined 2.5%, after the company agreed to acquire Hillstone Environmental Partners from Golden Gate Capital, in a deal worth approximately \$600.0 million. Facebook dropped 1.5%, on the back of reports that the Department of Justice is planning to launch an anti-trust investigation against the company. On the contrary, Beyond Meat surged 11.6%, after the company agreed a deal with McDonald's to test a plant-based burger in Canada. Square gained 3.9%, following a rating upgrade on the stock to 'Outperform' from 'Market Perform'. Accenture rose 0.7%, after reporting better than expected earnings in the fourth quarter. The S&P 500 slipped 0.2%, to settle at 2,977.6. The DJIA fell 0.3%, to settle at 26,891.1, while the NASDAQ shed 0.6%, to close at 8,030.7.

## Europe Market Snapshot

European markets finished higher yesterday, led by gains in healthcare and utilities sector stocks. Colruyt jumped 7.6%, after the Belgian retailer raised its net income outlook for the full year. METRO gained 1.5%, following reports that the company is planning to divest the hypermarket business. Sunrise Communications Group added 1.2%, after the Swiss anti-trust authority approved the company's proposed acquisition of Liberty Global's Swiss UPC business. On the flipside, Demant declined 3.1%, after the Danish firm lowered its annual operating profit guidance and suspended its share buyback programme. Telefonaktiebolaget LM Ericsson dropped 2.2%, after the company warned that third quarter results will be hit by a \$1.2 billion provision set aside to resolve investigations by the US authorities. The FTSEurofirst 300 index gained 0.7%, to settle at 1,535.0. The German DAX Xetra rose 0.4%, to settle at 12,288.5, while the French CAC-40 added 0.7%, to close at 5,620.6.

## Asia Market Snapshot

Markets in Asia are trading lower this morning. In Japan, Japan Display has plunged 9.0%, after the Chinese investment fund, Harvest Tech Investment Management, withdrew from its previously announced bailout plan for the company. Meanwhile, Advantest and FANUC have risen 1.1% and 1.2%, respectively. In Hong Kong, AAC Technologies Holdings and CNOOC have dropped 1.3% and 1.6%, respectively. Meanwhile, Hang Seng Bank and Geely Automobile Holdings have gained 1.0% and 3.8%, respectively. In South Korea, Woori Financial Group and Lotte Shopping have declined 3.2% and 4.8%, respectively. Meanwhile, Kia Motors and AMOREPACIFIC have advanced 0.2% and 2.9%, respectively. The Nikkei 225 index is trading 1.2% lower at 21,780.0. The Hang Seng index is trading 0.3% down at 25,973.1, while the Kospi index is trading 1.1% lower at 2,051.5.

## Key Corporate Releases Today

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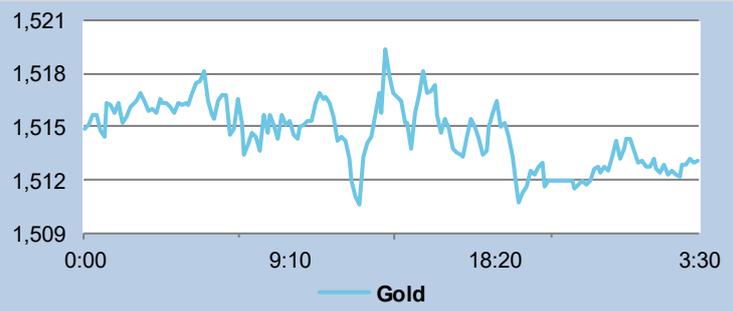
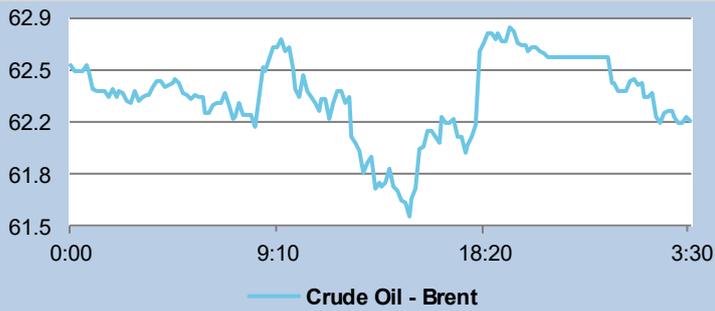
### UK

Company Name	Results	Currency	Full Year Consensus	
			Estimated EPS	Estimated Revenue (Mn)
ADES International Holding Plc	Interim	GBP	1.93	437.86
CVS Group Plc	Final	GBP	0.47	405.50
Savannah Petroleum Plc	Interim	USD	-	211.00
Firestone Diamonds Plc	Final	USD	(0.02)	61.73
SpaceandPeople Plc	Interim	GBP	0.02	8.80
Byotrol Plc	Final	GBP	-	4.20
Crimson Tide Plc	Interim	GBP	-	3.50
Anglo African Oil & Gas Plc	Interim	GBP	(0.01)	0.20
Andrews Sykes Group Plc	Interim	GBP	-	-
Zegona Communications Plc	Interim	GBP	0.20	-
Advanced Oncotherapy Plc	Interim	GBP	(0.10)	-
GAN Plc	Interim	GBP	-	-
Pennpetro Energy Plc	Interim	GBP	-	-
Volga Gas Plc	Interim	USD	-	-
Quadrise Fuels International Plc	Final	GBP	-	-
Victoria Oil & Gas Plc	Interim	USD	-	-
Savannah Resources Plc	Interim	GBP	(0.03)	-
Helios Underwriting Plc	Interim	GBP	-	-
I3 Energy Plc	Interim	GBP	(0.03)	-
Strategic Minerals Plc	Interim	GBP	-	-
London Finance & Investment Group Plc	Final	GBP	-	-
Cadence Minerals Plc	Interim	GBP	-	-
Hemogenyx Pharmaceuticals Plc	Interim	GBP	-	-
Tandem Group Plc	Interim	GBP	-	-
PowerHouse Energy Group Plc	Interim	GBP	-	-
DCD Media Plc	Interim	GBP	-	-
Pathfinder Minerals Plc	Interim	GBP	-	-
Dillistone Group Plc	Interim	GBP	-	-
Xtract Resources Plc	Interim	GBP	-	-
Thor Mining Plc	Final	GBP	-	-
Nostra Terra Oil & Gas Co Plc	Interim	GBP	-	-
Bould Opportunities Plc	Interim	GBP	-	-
Cabot Energy Plc	Interim	EUR	-	-
Bezant Resources Plc	Interim	GBP	-	-
Alexander Mining Plc	Interim	GBP	-	-
Gunsynd Plc	Final	GBP	-	-
Curzon Energy Plc	Interim	GBP	-	-

Note: All Estimates are for Full Year

**Commodity, Currency and Bitcoin**

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**Commodity**

- At 0330GMT today, Brent crude oil one month futures contract is trading 0.89% or \$0.56 lower at \$62.18 per barrel, ahead of the weekly US oil rig count data by Baker Hughes, scheduled to be released later today. Yesterday, the contract climbed 0.56% or \$0.35, to settle at \$62.74 per barrel, after the US agreed to deploy military equipment in Saudi Arabia, following recent attacks on Saudi oil facilities.
- At 0330GMT today, Gold futures contract is trading 0.32% or \$4.90 higher at \$1512.80 per ounce. Yesterday, the contract climbed 0.19% or \$2.80, to settle at \$1507.90 per ounce.



**Currency**

- At 0330GMT today, the EUR is trading marginally higher against the USD at \$1.0922, ahead of the Euro-zone consumer confidence index data and business climate index data, both for August, due in a few hours. Additionally, investors await the US durable goods orders data for August and Michigan consumer sentiment index data for September, scheduled later today. Yesterday, the EUR weakened 0.2% versus the USD, to close at \$1.0921. On the data front, the German consumer confidence index surprisingly advanced in October. In other economic news, the US economy grew as expected in the second quarter, whereas the nation's advance goods trade deficit widened in August.
- At 0330GMT today, the GBP is trading marginally higher against the USD at \$1.2329. Yesterday, the GBP weakened 0.2% versus the USD, to close at \$1.2328. On the macro front, the UK consumer confidence unexpectedly rose in September.



**Bitcoin**

- At 0330GMT today, BTC is trading 0.83% lower against the USD at \$8026.66. Yesterday, BTC declined 4.91% against the USD to close at \$8094.12. In major news, cryptocurrency exchange, Coinbase, announced that it is expanding the trading of Stellar and Chainlink to the customers based in New York. In a key development, data privacy startup, StrongSalt, has raised \$3.0 million of seed funding from Valley Capital Partners to further develop its encryption platform-as-a-service for developers and enterprises.

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### UK Top Sector Performers

Sector	Current Price	1D Change	1D (%) Change	1M (%) Change	1Y (%) Change
Gas, Water & Multiutilities	4833.34	126.99	2.7%	4.5%	4.1%
Software & Computer Services	1907.36	34.11	1.8%	-8.6%	3.9%
Real Estate Investment Trusts	2986.35	44.62	1.5%	6.1%	1.4%
Beverages	26053.54	370.88	1.4%	-4.1%	20.4%
Mobile Telecommunications	3668.05	51.47	1.4%	7.0%	-1.7%

### UK Worst Sector Performers

Sector	Current Price	1D Change	1D (%) Change	1M (%) Change	1Y (%) Change
Tobacco	31678.09	-873.02	-2.7%	-0.2%	-21.1%
Oil Equipment & Services	8462.15	-152.75	-1.8%	0.3%	-46.0%
Industrial Transportation	2305.20	-24.42	-1.0%	0.5%	-28.5%
Industrial Metals	4250.93	-44.79	-1.0%	-6.2%	-16.7%
Chemicals	12554.91	-8.19	-0.1%	3.2%	-23.9%

## Key Economic News

#### UK consumer confidence unexpectedly rose in September

In the UK, the consumer confidence climbed unexpectedly to a level of -12.00 in September, higher than market expectations of an unchanged reading. The consumer confidence had registered a level of -14.00 in the previous month.

#### German consumer confidence index surprisingly rose in October

In Germany, the consumer confidence index registered an unexpected rise to a level of 9.90 in October, compared to a reading of 9.70 in the previous month. Market expectation was for the index to record a steady reading.

#### US initial jobless claims advanced in the last week

In the US, the seasonally adjusted initial jobless claims rose to a level of 213.00 K in the week ended 21 September 2019, compared to a revised reading of 210.00 K in the prior week. Market expectation was for initial jobless claims to climb to a level of 212.00 K.

#### US advance goods trade deficit rose in August

In the US, advance goods trade deficit widened to \$72.83 billion in August, compared to a revised advance goods trade deficit of \$72.46 billion in the prior month.

#### US annualised GDP climbed in 2Q 2019

In the US, the final annualised gross domestic product (GDP) recorded a rise of 2.00% on a quarterly basis in 2Q 2019, compared to a rise of 3.10% in the previous quarter.

## Share Tips, Bids and Rumours

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- [The Daily Telegraph \(Questor share tips\)](#): Which of Questor's trusts have gained the most from a narrowing in their discount?
- [The Times \(Tempus share tips\)](#): "Hold" CRH; "Avoid" Coats Group.
- [Daily Mail](#): Marks & Spencer chairman Archie Norman bought nearly £100,000 worth of the company's shares as they crashed to their lowest level for nearly two decades.
- [The Daily Telegraph](#): Investment manager Shore Capital is planning to delist from London's junior stock market.
- [Financial Times](#): Luckin Coffee, China's rival to Starbucks, has agreed to establish a joint venture with Louis Dreyfus Company to develop a juice brand in China.

## Newspaper Summary

## The Times

**Peer-to-peer lenders given final warning by Financial Conduct Authority:** The City regulator has warned Britain's peer-to-peer lending industry to "act now" to clean up poor practices or face a "strong and rapid" crackdown.

**British Airways pilots strike knocks €137 million off profit:** Industrial action by pilots at British Airways will knock €137 million off the operating profits of its owner, International Consolidated Airlines Group.

**Cruise giant Carnival in choppy waters:** The higher cost of fuel and tensions in the Gulf after this month's drone attacks on Saudi Arabian oil facilities have taken their toll on Carnival as the cruise operator lowered its full-year profit forecast.

**Setback for property platform Onthemarket as buyers and sellers 'wait and see':** Onthemarket, the property portal, has issued a surprise warning on revenue, blaming the Brexit-driven slowdown in the housing market.

**Peloton runs flat on its first day at market:** The home fitness company Peloton had a disappointing debut on Wall Street, continuing the wave of lacklustre public flotations this year.

**Xaar hit by results gloom and exodus:** The inkjet printer specialist Xaar lost more than a third of its value after revealing a management exodus and poor results.

**Blackmore Bond delays accounts again:** A company that has raised more than £25 million for property developments by selling minibonds has delayed filing its accounts for a second time following the resignation of its auditor this year.

**Cuts take bite out of travel snack retailer SSP:** Shares in SSP Group fell after the operator of sandwich shops at airports and railway stations warned it faced a challenge from economic uncertainty and cuts to airline capacity.

**Political uncertainty dents earnings at Alfa Financial:** Alfa Financial, the maker of software for the leasing industry, has blamed political uncertainties for a sharp fall in profits.

## The Independent

**Jaguar Land Rover to suspend production at all U.K. plants for one week after Brexit date:** Jaguar Land Rover (JLR) will suspend production at all of its four U.K. factories for the week of 4 November in anticipation of disruption to imports due to Brexit.

**Money laundering: ABN Amro investigation adds to growing wave of European scandals:** Europe's widening money laundering scandals took a new turn as Dutch lender ABN Amro Bank disclosed a criminal probe over alleged failures to check on clients and report suspicious transactions.

## Financial Times

**ExxonMobil sells Norway assets to Var for \$4.5 billion:** ExxonMobil has agreed a \$4.5 billion deal to sell the bulk of its Norwegian assets to Vår Energi, as the American energy major retreats from the North Sea to place greater focus on U.S. shale fields.

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**Nigeria granted stay of execution in \$9.6 billion court battle:** The English High Court has granted the Nigerian government

a temporary reprieve from having to pay \$9.6 billion in compensation to a small gas company which it says it is part of a "scam".

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**WeWork halts all new lease agreements to stem losses:** WeWork has put a halt to the signing of new lease agreements with property owners as the lossmaking group tries to rapidly rein in costs, according to people briefed on the matter.

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**S&P downgrades WeWork's debt by one notch:** S&P has downgraded its credit rating for WeWork on concerns about the company's access to capital and governance practices which led to the departure of its Chief Executive Adam Neumann earlier this week.

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**Cost of Thomas Cook collapse becomes clearer:** Thomas Cook's collapse could land the government and the travel industry's insurance scheme with a bill of more than £500 million, according to official estimates.

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**U.K. broker Shore Capital to quit London stock market:** Shore Capital, a small London stockbroker whose business relies on small companies believing there is a benefit in being public, is quitting the stock market.

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**Woodford investment trust hit by triple writedowns:** Neil Woodford's investment trust has been forced to write down the value of three more of its holdings, in a further body blow to Britain's well-known stockpicker.

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**Mohamed El-Erian joins Barclays as a non-executive director:** Mohamed El-Erian, the former Chief Executive of bond group Pimco, is joining Barclays as a non-executive director.

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**Rothsay Life signs U.K.'s biggest ever pension transfer deal:** Rothsay Life has signed the U.K.'s biggest ever pension transfer deal, taking on the massive £4.7 billion former GEC scheme. The deal will cover the pensions of 39,000 people.

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**BNP lawyer exits bank after supporting HK protests:** A lawyer working for BNP Paribas in Hong Kong has left the French bank after he posted comments on social media in support of protests in the city, provoking a furious response from Beijing.

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**KPMG switches 820 U.K. staff from advisory to audit:** KPMG has moved 800 staff and about 20 partners from its advisory division into its audit department in preparation for a possible forced break-up.

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**Pearson warns on weak U.S. university sales:** Pearson warned weak sales to U.S. universities and students would weigh on profits this year, denting the educational publisher's ambition to return to revenue growth next year and sending its shares almost 20% lower.

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**Entertainment group Endeavor shelves plan for IPO:** Endeavor Group, parent of Hollywood's biggest talent agency and owner of the Ultimate Fighting Championship martial arts franchise, shelved plans to list after it faced limited investor interest, according to a person briefed on the matter.

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**CFTC wins reprieve against contempt charge in Kraft wheat case:** Appellate judges have halted an attempt by Kraft Heinz and Mondelez International to haul the U.S. commodities regulator into court to justify controversial statements about the companies' grain trading.

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**MPs to launch inquiry into Thomas Cook collapse:** MPs will hold an inquiry into the collapse of Thomas Cook focusing on its accounting practices, executive pay, and the role of its auditors as costs from the fallout look set to reach nearly £1 billion.

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**China's Luckin Coffee eyes juice venture with Louis Dreyfus Company:** Luckin Coffee, China's rival to Starbucks, has agreed to establish a joint venture with Louis Dreyfus Company to develop a juice brand in China, as the international agricultural trader seeks to expand its retail food and drink presence in the country.

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**Debenhams finance Chief quits to join Ted Baker:** Rachel Osborne, the Chief Financial Officer who helped steer Debenhams through a complicated pre-pack administration and restructuring, is leaving the group after a year to take up the same role at Ted Baker.

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**Imperial Brands warns of hit from U.S. vaping clampdown:** Imperial Brands warned that the backlash against vaping and e-cigarettes in the U.S. would weigh on revenues, prompting a 10% fall in its shares.

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**McKinsey to start selling underwear and make-up:** In a first for the high-minded management consultancy, McKinsey is opening a retail store and flogging underwear, make-up and jewellery to customers in a Midwest shopping mall.

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**Micron profit outlook pressured by trade, economy:** Micron Technology issued a softer profit forecast than expected amid ongoing uncertainty over trade and the economy, overshadowing signs demand has improved.

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**Peloton back-pedals from offer price in Wall Street debut:** Peloton fell to the back of the initial public offering, err, peloton after the high-end fitness equipment maker's first

trade came in below the company's float price.

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**Baidu to sell \$1 billion of shares in travel website Ctrip:** China's search engine giant Baidu is selling roughly \$1 billion of its shares in Ctrip, China's largest travel-booking website, bolstering its cash on hand after a difficult year for profits.

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**Ericsson braced for 5G blow as it prepares for corruption penalties:** Ericsson said its 5G rollout would take a hit after booking provisions of \$1.2 billion ahead of the conclusion of U.S. probes into overseas corruption allegations.

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**Virgin and Wizz Air eye Thomas Cook's Gatwick slots:** Virgin Atlantic and Wizz Air are eyeing one of Thomas Cook's most valuable assets — its take-off and landing slots at London's Gatwick airport, which could be worth tens of millions of pounds.

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**Lex:**

**McKinsey store: undies study:** At last, the high priests of multinational capitalism are running a proper business. Or are they?

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**ABN Amro/money laundering: badly mangled:** European bank is latest to reveal it is under investigation for allegedly poor policing of clients.

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**Pearson: textbook error:** The educational publisher produces multiple choice exams and multiple profit warnings.

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**Lombard:**

**BA owner is cutting off its nose to spite its face:** "Whatever the rights and wrongs of the British Airways pilots' strike, customers have been invited to fly with other airlines; some will find the experience better. No one knows the size of this loss..."

So wrote a Financial Times reader, and former BA Goldcard holder, two weeks ago. But, now, we do know. BA's owner IAG said

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“the net financial impact of the industrial action is estimated to be €137 million”. Add that to €33 million for “disruption” at Heathrow, and €45 million for “adverse” booking trends at its low-cost airlines, and the loss — or the reduction to full-year operating profit — is 6%. All of this to avoid paying pilots another £5 million, or €5.6 million, a year, which is the gap between their demands and the current BA pay offer, according to the union, Balpa.

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## The Daily Telegraph

**U.S. crackdown on vaping wipes £7 billion off tobacco firms:** Panicked traders have wiped almost £7 billion off Britain's tobacco firms since Donald Trump launched a crackdown on vaping.

**Barclays adds two big names to board in wake of investor pressure:** Barclays Chairman Nigel Higgins has shaken up the bank's board by hiring two well-known financiers following pressure from investors to bring in fresh faces.

**Forget the BLT: McDonald's and Beyond launch the plant-based PLT burger:** McDonald's is the latest fast food chain to offer plant-based burgers following the success of Burger King's meatless "Whopper".

**Woodford trust to slash value of three more holdings:** Embattled fund manager Neil Woodford suffered a triple-whammy humiliation after the investment trust he runs was forced to cut the value of three more of its holdings.

**All Bar One owner Mitchells & Butlers toasts jump in sales:** Mitchells & Butlers toasted higher sales as punters flocked to its watering holes over the summer.

## Daily Mail

**Sir Philip Green was a perfect gent! The VERY surprising verdict of pensions boss after dealing with Arcadia tycoon:** Since Oliver Morley took the reins at the

Pension Protection Fund in 2018 his life has been dominated by catastrophe on the High Street as a string of retailers have sought to escape debts.

**M&S Chairman Archie Norman buys nearly £100,000 worth of shares as they crash:** The retail guru purchased 55,000 shares for 180.5p each - taking his holding up to 148,600. That was worth nearly £270,000 at closing price of 180.25p - the lowest level since early 2001.

**New battle against Aldi and Lidl: Sainsbury's to close 125 shops after botched Asda merger, as Tesco plans a supermarket shake-up too:** Sainsbury's will close 125 stores to cut costs and shift focus on to convenience stores as a plan B after its failed merger with Asda. It hopes to find £500 million of savings over five years.

**Sofa chain DFS flags sales slowdown amid ongoing Brexit saga and stagnating housing market:** The furniture firm, founded 50 years ago, said sales momentum slowed towards the back end of its financial year amid 'the increasingly uncertain political and economic backdrop'.

## The Scotsman

**Airbnb to bring in Scottish registration system and landlord regulations:** Airbnb has revealed proposals for landlord planning regulations and a registration system across Scotland.

**Former top secret Machrihanish air base wins £488,000 spaceport funding:** The former top secret Machrihanish air base has been awarded nearly £500,000 to develop its spaceport plans - but rivals Prestwick says it hasn't been left behind.

**Sir David Murray's family firm swings into red:** The family investment firm of Sir David Murray – behind two of the biggest development projects in the pipeline for Edinburgh – fell into the red last year as it took a £1.2 million provision over a possible tax bill.

**Winchburgh garage told to clear car lot:** A Winchburgh garage has been told to clear a car lot in the village's main street after failing to obtain planning permission for the site.

**Edinburgh International Conference Centre hosting session to attract talent into £40 billion U.K. events trade:** The Edinburgh International Conference Centre (EICC) is hosting an open day to help encourage more talent into the U.K. events industry – which it says is now worth more than £40 billion.

**Gin proves a real tonic for investors in Scotland:** Looking at the headline figures on the value of deals done in the first half of this year, it would seem that oil and gas were particularly active, but analysis shows there is more to the investment story in Scotland.

**Silicon Valley tech firm scales up with 45 new jobs at Glasgow base:** A global engineering software company headquartered in Silicon Valley is promising 45 jobs after rolling out an expanded base in Glasgow.

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## Risk Warning & Disclaimer

### CFD and Spread betting Risk Warning

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The value of stocks and shares, and the income from them, can fall as well as rise and you may not get back the full amount you originally invested. Past performance is not necessarily a guide to future performance.

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