

Key Global Indices

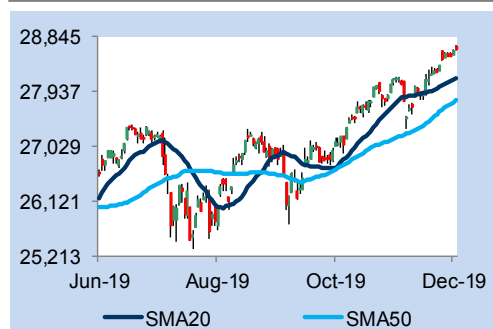
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	Last Close	1D% Chg	5D% Chg	1M% Chg	1Y% Chg		Last Close	1D% Chg	5D% Chg	1M% Chg	1Y% Chg		
FTSE 100	7,644.9	↑	0.2%	0.8%	2.9%	16.1%	S&P 500	3,240.0	↑	0.003%	0.6%	2.7%	30.2%
FTSE 250	22,059.0	↑	0.4%	1.8%	5.3%	29.1%	DJIA	28,645.3	↑	0.1%	0.7%	1.7%	23.8%
DJSTOXX 50	3,435.5	↑	0.2%	0.1%	2.2%	27.4%	Nasdaq	9,006.6	↓	-0.2%	0.9%	3.5%	36.9%
FTSEurofirst 300	1,639.3	↑	0.2%	0.2%	2.3%	26.1%	Nikkei 225*	23,676.5	↓	-0.7%	0.1%	1.7%	18.7%
German DAX 30	13,337.1	↑	0.3%	0.1%	0.4%	28.5%	Shanghai Composite*	3,033.3	↑	0.9%	2.6%	3.5%	21.0%
France CAC 40	6,037.4	↑	0.1%	0.3%	1.9%	31.3%	DJIA at London close	28,698.5			*Time - GMT	4:30	

FTSE 100



DJIA



DJ Euro STOXX50



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UK Market Snapshot

UK markets finished higher on Friday, led by gains in mining and retail sector stocks. Miners, Antofagasta, BHP Group and Glencore rose 0.9%, 1.1% and 1.7%, respectively. Retailers, J Sainsbury, Tesco and Ocado Group advanced 0.7%, 1.0% and 1.3%, respectively. Infrastrata gained 1.6%, after the company announced the appointment of Clive Richardson as its Chairman, effective from 1 February 2020. On the flipside, Anglo African Oil & Gas plunged 10.0%, after the company agreed to sell majority stake of its Congolese subsidiary to oil & gas producer, Zenith Energy, up 8.8% for £1.0 million. NMC Health dropped 2.6%. The company stated that it has obtained a letter from the engineering consultant confirming the total built-up floor area of the NMC Royal Women's Hospital. The FTSE 100 advanced 0.2%, to close at 7,644.9, while the FTSE 250 rose 0.4%, to end at 22,059.0.

US Market Snapshot

US markets closed mostly higher on Friday, supported by gains in technology and consumer discretionary sector stocks. Technology stocks, Microsoft, International Business Machines and Intel rose 0.2%, 0.3% and 0.4%, respectively. Michaels rallied 32.9%, after announcing the appointment of Ashley Buchanan as its new Chief Executive Officer (CEO). Flexion Therapeutics surged 9.2%, after the pharmaceutical firm received an approval from the US Food and Drug Administration (FDA) to update the product label for its osteoarthritis knee pain treatment, Zilretta. Anixter International advanced 2.9%, after the company revealed that it is considering a revised proposal from WESCO International, up 2.6%. Comcast gained 0.3%, following reports that the company is in advanced talks to acquire video-streaming company, Xumo. The S&P 500 marginally rose to settle at 3,240.0, while the DJIA gained 0.1% to settle at 28,645.3. The NASDAQ fell 0.2%, to close at 9,006.6.

Europe Market Snapshot

European markets finished in positive territory on Friday, driven by gains in technology and healthcare sector stocks. Chipmakers, STMicroelectronics, Logitech International and Dialog Semiconductor advanced 0.3%, 0.4% and 1.3%, respectively. Adidas gained 0.7%, on the back of reports that the company is planning to introduce a wide range of products for alpine skiing. Credit Suisse Group added 0.6%. The US Financial Industry Regulatory Authority (FINRA) and several major exchanges have imposed a penalty of \$6.5 million on the company's US-based securities business for supervisory failure. Volkswagen rose 0.1%, after the German automaker revealed that it would reach its key production target of 1.5 million electric cars by the end of 2025 earlier than previously anticipated. The FTSEurofirst 300 index gained 0.2%, to close at 1,639.3. The German DAX Xetra 30 rose 0.3%, to close at 13,337.1, while the French CAC-40 advanced 0.1%, to settle at 6,037.4.

Asia Market Snapshot

Markets in Asia are trading mostly lower this morning. In Japan, Adastria has declined 6.5%, after the clothing shop operator's quarterly earnings outlook fell short of market consensus. Meanwhile, Takashimaya, Credit Saison and Toyobo have advanced 1.1%, 1.3% and 2.0%, respectively. In Hong Kong, PetroChina, Country Garden Holdings and Techtronic Industries have gained 0.3%, 2.1% and 2.4%, respectively. Meanwhile, AAC Technologies Holdings, CSPC Pharmaceutical Group and Sino Biopharmaceutical have fallen 0.2%, 0.3% and 0.7%, respectively. In South Korea, SK Hynix, Lotte Chemical and Hana Financial Group have dropped 1.3%, 1.8% and 2.4%, respectively. Meanwhile, Amorepacific, NAVER and Hanmi Science have added 1.5%, 1.9% and 3.7%, respectively. The Nikkei 225 index is trading 0.7% lower at 23,676.5. The Hang Seng index is trading 0.6% up at 28,403.8, while the Kospi index is trading 0.1% lower at 2,201.0.

Key Corporate Releases Today

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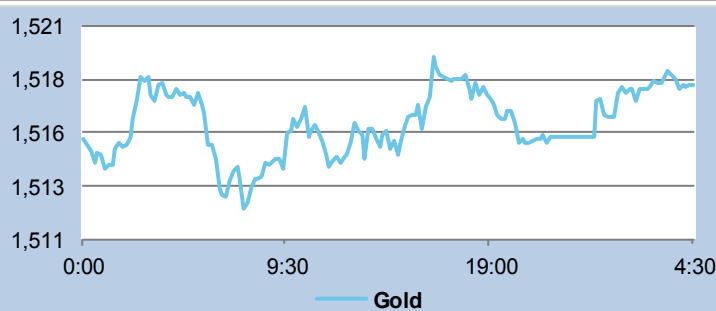
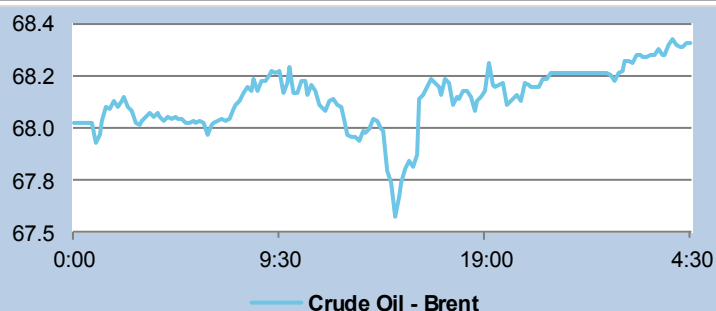
UK

Company Name	Results	Currency	Full Year Consensus	
			Estimated EPS	Estimated Revenue (Mn)
Proxexis Plc	Interim	GBP	-	-
Coral Products Plc	Interim	GBP	-	-
SimiGon Ltd	Interim	USD	-	-
Catenae Innovation Plc	Final	GBP	-	-

Note: All Estimates are for Full Year

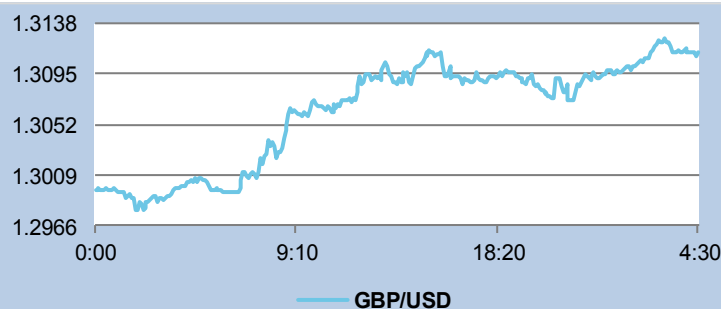
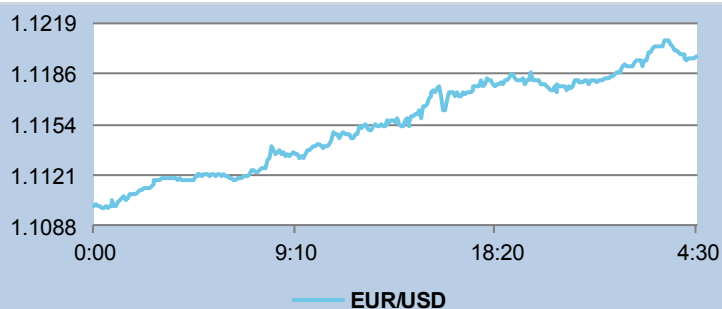
Commodity, Currency and Bitcoin

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Commodity

- At 0430GMT today, Brent crude oil one-month futures contract is trading 0.25% or \$0.17 higher at \$68.33 per barrel. On Friday, the contract climbed 0.35% or \$0.24, to settle at \$68.16 per barrel, after the Energy Information Administration reported that the US crude oil inventories dropped by 5.4 million barrels in the week ended 20 December 2019. Further, Baker Hughes reported that the active oil drilling rigs in the US fell by 8 to 677 in the week ended 27 December 2019.
- At 0430GMT today, Gold futures contract is trading marginally higher at \$1518.10 per ounce. On Friday, the contract climbed 0.58% or \$8.80, to settle at \$1518.10 per ounce, as weakness in the US Dollar prompted investors to seek shelter in the dollar denominated commodity.



Currency

- At 0430GMT today, the EUR is trading 0.19% higher against the USD at \$1.1198, ahead of the German retail sales for November, due in a few hours. Additionally, investors await the US pending home sales data for November and Dallas Fed manufacturing business index for December, slated to be released later today. On Friday, the EUR strengthened 0.71% versus the USD, to close at \$1.1177.
- At 0430GMT today, the GBP is trading 0.27% higher against the USD at \$1.3113, ahead of the UK's mortgage approvals data for November, due in a few hours. On Friday, the GBP strengthened 0.65% versus the USD, to close at \$1.3078.



Bitcoin

- At 0430GMT today, BTC is trading 1.76% higher against the USD at \$7346.44. On Friday, BTC advanced 0.42% against the USD to close at \$7219.50. According to sources, Apple has asked cryptocurrency exchange Coinbase to remove the DApp browser feature from its mobile cryptocurrency wallet, Coinbase Wallet. In a key development, cryptocurrency exchange, Huobi has unveiled a fiat gateway in Indonesia, which will enable a direct fiat-to-cryptocurrency trading between the Indonesian Rupiah and Tether.

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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
Real Estate Investment & Services	3031.24	40.59	1.4%	9.1%	32.0%
Real Estate Investment Trusts	3362.83	44.37	1.3%	3.9%	29.6%
General Retailers	2551.68	26.88	1.1%	10.1%	40.3%
Industrial Metals	3736.13	35.15	0.9%	8.1%	-15.0%
Construction & Materials	7188.37	66.79	0.9%	5.8%	50.4%

UK Worst Sector Performers

Sector	Current Price	1D Change	1D (%) Change	1M (%) Change	1Y (%) Change
Oil Equipment & Services	8350.63	-121.66	-1.4%	8.5%	-17.0%
Health Care Equipment & Services	8431.20	-93.12	-1.1%	2.6%	25.1%
Oil & Gas Producers	8211.64	-41.90	-0.5%	2.0%	-0.1%
Software & Computer Services	2233.05	-6.12	-0.3%	2.0%	33.8%
Banks	3825.12	-6.32	-0.2%	4.2%	5.8%

Key Economic News

ECB Economic Bulletin: Global economy shows signs of stabilisation although inflation remains subdued

The European Central Bank (ECB), in its latest economic bulletin, indicated that the central bank will maintain its current dovish policy stance throughout 2020, with policymakers showing no particular inclination to shift towards higher interest rates. Moreover, it stated that the economic conditions are starting to stabilise, although inflationary pressures remain generally muted.

Swiss economic expectations index unexpectedly rose in December

In Switzerland, the economic expectations index registered an unexpected rise to a level of 12.50 in December, compared to a reading of -3.90 in the previous month. Market expectation was for the index to drop to a level of -8.50.

Japanese vehicle production declined in October

In Japan, vehicle production recorded a drop of 11.90% on a YoY basis in October. Vehicle production had risen 2.30% in the previous month.

Share Tips, Bids and Rumours

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- [The Daily Telegraph \(Questor share tips\)](#): There were plenty of hits this year, but we must take stock of the misses too.
- [The Daily Telegraph](#): Digital challenger bank Monzo is in talks to raise up to £100 million in the next few weeks ahead of plans for a significant new funding round in 2020.

Newspaper Summary

The Times

Honour for Ross McEwan angers small businesses hit by RBS scandal: The CBE awarded to the former head of Royal Bank of Scotland in the new year's honour list has provoked a backlash from business owners and MPs.

Coltrane Asset Management bets against Future magazines: An American hedge fund that blocked a rescue deal for Interserve, the giant outsourcer, has taken a £17 million short position in Future, the fast-growing magazine and website owner. Coltrane Asset Management is betting that the publisher's share price is heading for a fall.

Scrap rail season tickets that penalise part-time workers, urges British Chambers of Commerce: Train companies have been urged to scrap season tickets because they exacerbate skills shortages by imposing a "part-time penalty" on commuters.

Shop staff bear brunt of crisis on high street: The growing pressure on bricks-and-mortar retailers has caused the biggest loss of jobs on the high street in 25 years, research suggests.

Apple skips a beat as doctor sues over its smart watch: A doctor from New York has sued Apple over the heartbeat monitoring technology used in its smart watch, claiming that the giant technology company has infringed his patent for a method of detecting irregular heartbeats.

Collapse of fashion chain Joy signals new year pain for retailers: Fashion and trinkets retailer Joy Group is set to collapse for the third time as harsh high street trading claims its first post-Christmas casualty.

Pets hungry for gourmet dining from Lily's Kitchen: Pet-food maker Lily's Kitchen has seen sales jump by almost 19% to £31 million.

Schroders family mints £4 million a day after FTSE surges back to life: The Schroders dynasty are this year's biggest winners on the London stock market, having chalked up gains at a rate of more than £4 million a day.

Neil Woodford flagship fund's surprise £15 million hit: The flagship fund of disgraced stock-picker Neil Woodford has been forced to pump £15 million into a loss-making chain of cancer centres as investors wait for their money to be returned at a big discount.

Brexit investment tycoon Jeremy Hosking lands slice of £153 million: An investment fund founded by Jeremy Hosking, a vocal Brexiteer and one of Britain's biggest steam-train collectors, has paid £127.2 million to just four individuals.

Financial Times

Graft and mismanagement claims taint Nigeria oil clean-up: At the public well in Ogale, locals say the water still stinks of benzene eight years after the UN recommended emergency measures to remove the carcinogen after decades of oil production in the Niger Delta. But they still gather each day to collect it for washing, cooking and drinking.

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WeWork documents reveal heads' golden parachutes: WeWork will have to pay close to \$17 million to replace its Co-Chief Executives under exit packages negotiated in the run-up to the company's rescue by SoftBank, according to documents reviewed by the Financial Times and people briefed on the matter.

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London's prime housing market stops falling: The beleaguered estate agents of Mayfair can raise a small festive cheer: house prices in London's most exclusive districts have stopped falling for the first quarter in more than four years.

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Monzo looks to raise up to £100 million in new funding: Monzo, the U.K. digital bank, is weeks away from raising fresh funds of between £50 million and £100 million in a deal that could precede another big investment round next year.

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Goldman tweaks repo operations to limit Basel impact: Goldman Sachs and JPMorgan have found ways to keep trading in the \$1.2 trillion U.S. repo market while limiting regulatory burdens, potentially easing a cash crunch at the turn of the year.

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U.S. bank lending plateaus as businesses hold back: U.S. banks' portfolios of business loans all but stopped growing in the second half of 2019, as an industrial slowdown crimped loan demand and larger businesses took advantage of cheap financing available in the capital markets.

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Prudential to prioritise Asia after split: Prudential will prioritise investing in Asia following the demerger of its U.K. business as it seeks to step up expansion in the region that already accounts for more than half of its profits.

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Yeovil hospital offers hope for U.K.'s stretched NHS: Surrounded by the Christmas trappings brightening the sterility of Yeovil District Hospital in Somerset, Eileen Johnstone is engaged in the less-than-festive process of receiving intravenous antibiotics for an infected knee.

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British Steel's new Chinese owner in stand-off with suppliers: British Steel's Chinese buyer is struggling to agree new

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contracts with suppliers, according to people with knowledge of the situation.

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Ethical sales rise as consumers go sustainable: Sales of ethical goods and services in the U.K. have increased almost tenfold in 20 years to hit record highs, according to the Co-operative Group.

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Sparkling wine sales lose fizz in U.K. as tastes change: Changing consumer tastes and an increase in taxes have taken the sparkle out of sales for champagne and other fizzy wines in the U.K., with the first fall in demand since the start of the 'prosecco boom' more than five years ago.

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Italian football club AS Roma set for sale to U.S. billionaire: AS Roma, the Italian football club, is nearing a deal to be acquired by a consortium led by U.S. billionaire Daniel Friedkin, said people briefed about the matter, which would make it the latest top Serie A team to change hands in recent years.

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Hong Kong struggles through a lean festive season: The festive season is usually a boom time for Hong Kong's retailers, restaurateurs and bar owners. But this year, many in the protest-rocked city are fighting for survival.

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Johnson urged to completely overhaul HS2 project: Boris Johnson has been urged to completely overhaul the High Speed 2 rail project by a former government adviser on rail, who has warned that the scheme in its current form is "misguided".

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Lex:

Corporate research: business of dreams: These days, heavy outlays are necessary to fuel innovation.

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The Daily Telegraph

Car giants face billions in fines as EU emissions rules take effect: Tough new emissions controls could see car manufacturers hit with mega-fines next year amid disappointing sales of electric vehicles.

Half of all audit fines in 2019 went to one firm: Accounting firm KPMG was on the receiving end of half of all fines issued by the audit watchdog this year.

Bankers' pay surges at City's top boutique firms: Bankers' pay has risen across the board at boutique advisory firms in the City as some of the largest U.K. mergers and acquisitions boosted profits and narrowed the lead of the big investment banks.

Electric scooter bubble fears mount as funding tops £1 billion: Venture capital funding for electric scooter start-ups topped £1 billion this year and hit record levels in Europe and the U.S. amid rising fears of a bubble emerging.

The techlash that never was: Facebook and Google unbowed after year of challenges: 2019 was supposed to be the year of the "techlash" - a political, cultural and regulatory backlash against the world's biggest technology companies. Yet the tidal wave did not quite break.

Daily Mail

Up to 10,000 jobs at risk in HSBC overhaul: Lender's interim head seeks to cut costs across global bank: Noel Quinn, the lender's interim head who is

vying to win the role on a full-time basis, will unveil the shake-up in February as he seeks to cut costs across the sprawling global bank. In the firing line will be parts of HSBC's U.S. division, its retail banking operations in France and about 10,000 jobs. In the U.S., it is understood that HSBC is considering offloading its west coast branches.

Smiths Group head rumoured to be set to leave after firm spins off its medical arm: Andy Reynolds Smith, 53, could stand down from his role after the deal is completed in the first half of next year. Smiths Group rejected the claim as 'inaccurate and without substance'.

Digital giants like Amazon and Facebook are natural monopolists which seek to wipe out competition: The CMA's holiday season intervention against Amazon's effort to gain a foothold in the U.K.'s restaurant delivery market by making a £442 million investment in Deliveroo is a significant moment.

Doting daughters sending their mothers flowers help business boom at florist Bloom & Wild: Turnover surged by 70% at the online florist, which specialises in posting bouquets in letterbox-sized packages. Bloom & Wild was founded in 2013 by Aron Gelbard.

The Scotsman

Aberdonian head of U.S.-based fintech mulls opening of Scottish office: The Scottish Founder of a U.S.-based fintech is considering opening an office in Scotland amid plans to expand in Europe.

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