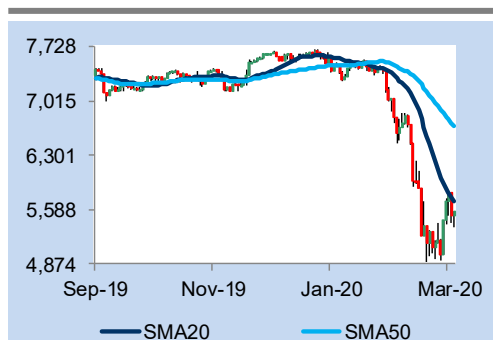


Key Global Indices

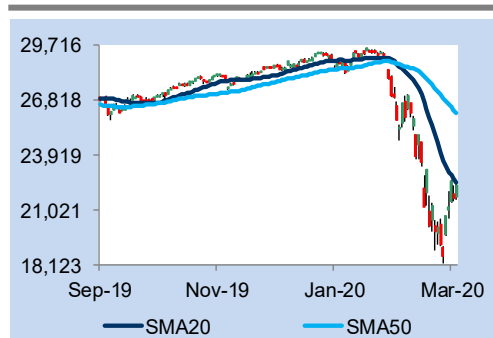
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	Last Close	1D% Chg	5D% Chg	1M% Chg	1Y% Chg		Last Close	1D% Chg	5D% Chg	1M% Chg	1Y% Chg
FTSE 100	5,563.7	↑ 1.0%	11.4%	-15.5%	-23.6%	S&P 500	2,626.7	↑ 3.4%	17.4%	-11.1%	-7.3%
FTSE 250	14,624.6	↓ -1.0%	11.8%	-24.3%	-23.5%	DJIA	22,327.5	↑ 3.2%	20.1%	-12.1%	-13.9%
DJSTOXX 50	2,699.9	↑ 2.3%	12.6%	-11.8%	-13.4%	Nasdaq	7,774.2	↑ 3.6%	13.3%	-9.3%	0.6%
FTSEurofirst 300	1,240.2	↑ 1.3%	12.4%	-15.3%	-16.9%	Nikkei 225*	19,233.5	↑ 0.8%	13.0%	-9.7%	-10.0%
German DAX 30	9,816.0	↑ 1.9%	12.3%	-17.4%	-14.8%	Shanghai Composite*	2,759.7	↑ 0.5%	-6.2%	-4.6%	-11.1%
France CAC 40	4,378.5	↑ 0.6%	11.9%	-17.5%	-18.2%	DJIA at London close	22,123.1	*Time - GMT 3:30			

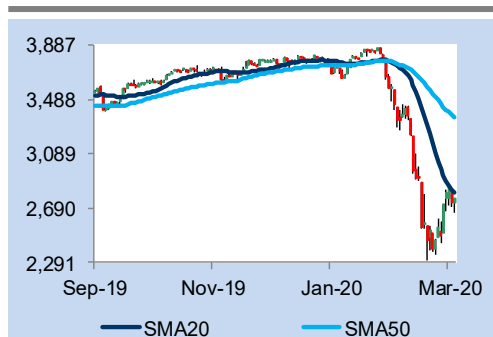
FTSE 100



DJIA



DJ Euro STOXX50



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Share Tips, Bids & Rumours and Newspaper Summary	5-7

UK Market Snapshot

UK markets finished mixed yesterday, as gains in energy and healthcare sector stocks were offset by losses in industrial and housebuilding sector stocks. AstraZeneca climbed 4.4%, after the drugmaker received an approval from the US Food and Drug Administration for its Imfinzi treatment against an aggressive type of lung cancer. Johnson Matthey advanced 1.6%. The company warned that annual results would miss market expectations, as auto demand was hit by coronavirus crisis. On the flipside, Hammerson tanked 22.1%, after the property company scrapped its final dividend and withdrew its 2020 financial outlook, due to the Covid-19 pandemic. EasyJet declined 7.2%, after the budget airline grounded its entire fleet of aircrafts, amid unprecedented travel restrictions imposed by governments across the globe. Ashted Group dropped 3.0%, following a rating downgrade on the stock to 'Sell' from 'Hold'. The FTSE 100 advanced 1.0%, to close at 5,563.7, while the FTSE 250 fell 1.0%, to end at 14,624.6.

US Market Snapshot

US markets closed higher yesterday, supported by gains in healthcare and technology sector stocks. Johnson & Johnson surged 8.0%, after the company revealed that the human testing of its experimental vaccine for the coronavirus will commence by September and it could be available for emergency use authorization in early 2021. Regeneron Pharmaceuticals advanced 5.2%, after announcing a partnership with French drugmaker Sanofi, up 4.6%, to expand its clinical trial for a potential coronavirus treatment using a rheumatoid arthritis drug. Cal-Maine Foods rose 0.1%, after its third quarter revenue and earnings topped market expectations. On the flipside, Marriott International declined 3.4%, after a leading broker lowered its target price on the stock to \$97.0 from \$148.0 and downgraded its rating to 'Sector Perform' from 'Outperform'. The S&P 500 gained 3.4%, to settle at 2,626.7. The DJIA rose 3.2%, to settle at 22,327.5, while the NASDAQ advanced 3.6%, to close at 7,774.2.

Europe Market Snapshot

European markets finished in positive territory yesterday, led by gains in healthcare and telecommunication sector stocks. Healthcare firms, Novartis, Roche Holding and Novo Nordisk advanced 2.4%, 3.2% and 5.8%, respectively. ASML Holding climbed 6.6%. The company lowered its first quarter revenue and gross margin outlook and halted its share buyback program, amid rising uncertainties from the coronavirus outbreak. On the flipside, ING Groep plunged 8.9%, after the lender scrapped its dividend payments until at least 1 October 2020. UniCredit tumbled 7.5%, after the company suspended its final dividend payment and share buyback programme. ABB declined 5.8%, after the engineering company forecasted a drop in its revenue for the first quarter, due to the Covid-19 pandemic. The FTSEurofirst 300 index gained 1.3%, to close at 1,240.2. The German DAX Xetra 30 rose 1.9%, to close at 9,816.0, while the French CAC-40 added 0.6%, to settle at 4,378.5.

Asia Market Snapshot

Markets in Asia are trading higher this morning. In Japan, Japan Steel Works and FUJIFILM Holdings have advanced 4.8% and 6.6%, respectively. Meanwhile, Yokohama Rubber and Toyo Seikan Group Holdings have declined 3.8% and 4.7%, respectively. In Hong Kong, CNOOC and Sino Land have climbed 4.1% and 4.4%, respectively. Meanwhile, CSPC Pharmaceutical Group and Sino Biopharmaceutical have dropped 3.5% and 5.8%, respectively. In South Korea, Hanmi Science and Celltrion have gained 4.1% and 11.4%, respectively. Meanwhile, Amorepacific and E-MART have fallen 0.9% and 1.4%, respectively. The Nikkei 225 index is trading 0.8% higher at 19,233.5. The Hang Seng index is trading 1.0% up at 23,405.5, while the Kospi index is trading 1.7% higher at 1,747.1.

Key Corporate Releases Today

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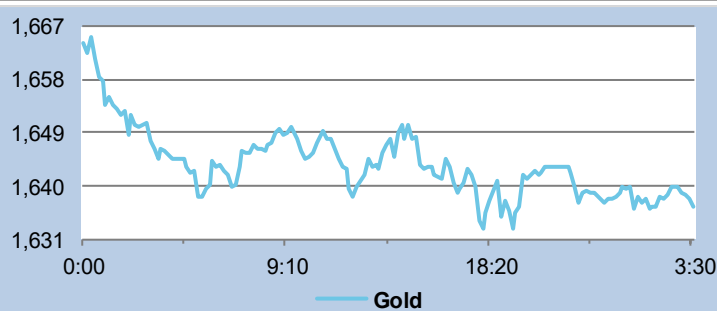
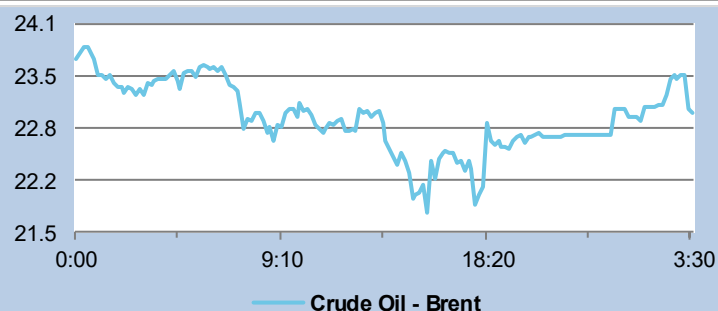
UK

Company Name	Results	Currency	Full Year Consensus	
			Estimated EPS	Estimated Revenue (Mn)
Diageo	Interim	GBP	1.27	12,976.36
Smiths Group	Interim	GBP	0.85	2,726.17
Chesnara Plc	Final	GBP	0.38	749.00
Tremor International Ltd.	Final	USD	0.43	325.00
James Halstead Plc	Interim	GBP	0.19	263.00
Luceco Plc	Final	GBP	0.07	172.00
IQE Plc	Final	GBP	(0.02)	139.17
MP Evans Group Plc	Final	USD	0.15	108.00
TP Group	Final	GBP	0.01	55.10
Michelmersh Brick Holdings Plc	Final	GBP	0.08	51.50
Inspired Energy Plc	Final	GBP	0.02	49.00
Gfinity Plc	Interim	GBP	-	14.40
DP Poland Plc	Final	GBP	(0.02)	12.65
Property Franchise Group Plc	Final	GBP	0.15	11.40
Surgical Innovations Group Plc	Final	GBP	0.00	10.60
One Media iP Group Plc	Final	GBP	0.00	3.40
Cyanconnode Holdings Plc	Final	GBP	(0.02)	2.30
Animalcare Group Plc	Final	GBP	-	-
JKX Oil & Gas Plc	Final	USD	-	-
Yu Group Plc	Final	GBP	-	-
Proteome Sciences Plc	Final	GBP	-	-

Note: All Estimates are for Full Year

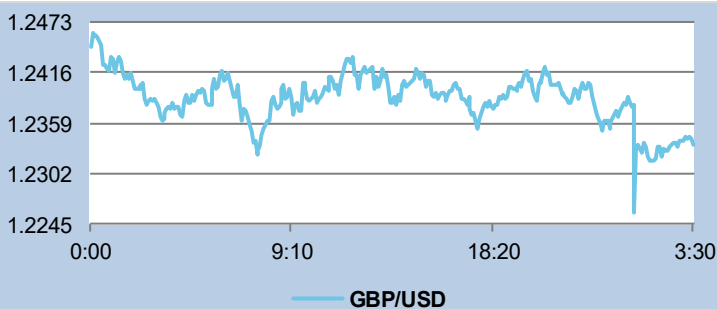
Commodity, Currency and Bitcoin

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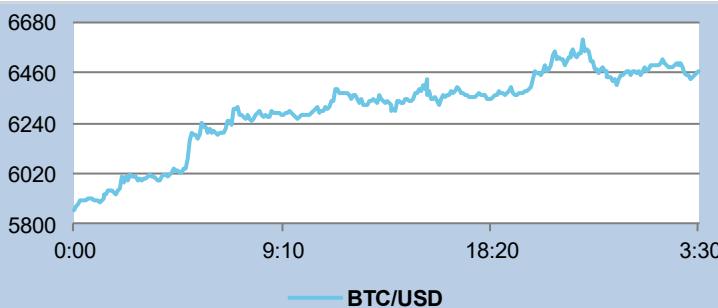
Commodity

- At 0330GMT today, Brent crude oil one-month futures contract is trading 0.97% or \$0.22 higher at \$22.98 per barrel, ahead of the American Petroleum Institute's weekly oil inventory data, scheduled to be released later today. Yesterday, the contract declined 8.70% or \$2.17, to settle at \$22.76 per barrel, its lowest level in 18 years, as rising concerns over global crude demand as well as ongoing oil price war between Saudi Arabia and Russia.
- At 0330GMT today, Gold futures contract is trading 0.92% or \$14.90 higher at \$1636.90 per ounce. Yesterday, the contract declined 0.18% or \$3.00, to settle at \$1622.00 per ounce, as strength in the US Dollar drifted investors away from the safe-haven commodity.



Currency

- At 0330GMT today, the EUR is trading 0.23% lower against the USD at \$1.1023, ahead of the Euro-zone inflation data for March, along with the German unemployment rate data for March, slated to be released later today. Additionally, investors await the US consumer confidence index data for March, scheduled later today. Yesterday, the EUR weakened 0.83% versus the USD, to close at \$1.1048, after the Euro-zone consumer confidence index declined in March, while the region's economic sentiment indicator fell to its lowest level since September 2013 in March. In other economic news, the US pending home sales rose to a 3-year high in February, whereas the Dallas Fed manufacturing business index unexpectedly dropped to a record low in March.
- At 0330GMT today, the GBP is trading 0.64% lower against the USD at \$1.2335, ahead of the UK fourth quarter GDP data, due in a few hours. Yesterday, the GBP weakened 0.37% versus the USD, to close at \$1.2414. On the data front, the UK number of mortgage approvals for house purchases advanced to its highest level since January 2014 in February, whereas the consumer confidence index dropped less than expected in March.



Bitcoin

- At 0330GMT today, BTC is trading 0.15% lower against the USD at \$6467.85. Yesterday, BTC declined 3.08% against the USD to close at \$6477.55. In major news, Spanish banking giant, Santander is planning to launch its Ripple-powered international payments system, One Pay FX, in Mexico in 2020. In a key development, Blockchain-as-a-Service (BaaS) company, BlockApps has joined hands with software consulting firm, Optimum, to develop a blockchain solution for tracking energy usage.

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UK Top Sector Performers

Sector	Current Price	1D Change	1D (%) Change	1M (%) Change	1Y (%) Change
Oil & Gas Producers	4941.68	191.55	4.0%	-21.0%	-45.4%
Pharmaceuticals & Biotechnology	15830.84	530.73	3.5%	-0.03%	4.1%
Gas, Water & Multiutilities	5138.93	126.81	2.5%	-5.6%	5.1%
Beverages	19966.09	442.11	2.3%	-9.7%	-20.0%
Personal Goods	33106.37	563.94	1.7%	-6.0%	-12.4%

UK Worst Sector Performers

Sector	Current Price	1D Change	1D (%) Change	1M (%) Change	1Y (%) Change
Automobiles & Parts	2684.08	-415.71	-13.4%	-32.0%	-56.5%
Industrial Transportation	1371.03	-124.74	-8.3%	-32.0%	-38.0%
Oil Equipment & Services	3512.69	-234.51	-6.3%	-52.2%	-67.7%
General Industrials	4278.13	-210.86	-4.7%	-23.5%	-22.0%
Aerospace & Defence	3418.91	-159.88	-4.5%	-27.9%	-26.9%

Key Economic News

UK consumer confidence index dropped in March

In the UK, the consumer confidence index recorded a drop to a level of -9.00 in March, compared to market expectations of a drop to a level of -14.00. In the prior month, the index had recorded to a reading of -7.00.

UK number of mortgage approvals for house purchases unexpectedly rose in February

In the UK, number of mortgage approvals for house purchases unexpectedly rose to a level of 73.55 K in February, compared to a revised to a level of 71.34 K in the prior month.

Euro-zone consumer confidence index dropped in March

In the Euro-zone, the final consumer confidence index fell to a level of -11.60 in March. The index had registered a level of -6.60 in the prior month.

Euro-zone economic sentiment indicator dropped in March

In the Euro-zone, the economic sentiment indicator dropped to a level of 94.50 in March, compared to market expectations of a fall to a reading of 90.60. The economic sentiment indicator had recorded a revised reading of 103.40 in the prior month.

US Dallas Fed manufacturing business index unexpectedly dropped in March

In the US, the Dallas Fed manufacturing business index unexpectedly eased to a level of -70.00 in March, compared to market expectations of an advance to 6.20. The index had recorded a level of 1.20 in the prior month.

US pending home sales unexpectedly climbed in February

In the US, pending home sales climbed 2.40% on a MoM basis in February, compared to a revised advance of 5.30% in the previous month. Markets were anticipating pending home sales to drop 0.30%.

Share Tips, Bids and Rumours

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- [The Times \(Tempus share tips\)](#): Taking stock of pension liabilities.
- [The Times](#): The sale of Kier's housebuilding business has been put on ice and about a third of the contractor and outsourcer's staff are to have their salaries cut.
- [The Daily Telegraph](#): Plessey, one of Britain's oldest electronics companies, has signed a deal to give Facebook exclusive use of its advanced wearable displays in developing new augmented reality glasses.
- [Financial Times](#): Italy's Exor is set to invest \$200 million into transport software business Via, valuing the company at \$2.3 billion, according to two people familiar with the matter.

Newspaper Summary

The Times

Busy supermarkets get £3 billion business rates holiday: Food retailers are in line for a £3 billion tax break at the same time as sales surge because of the coronavirus lockdown, according to research.

Dividend payouts leave banks with painful dilemma: Banks had lined up healthy dividends for shareholders after a reasonable year in 2019. Heads hoped that the payouts might get frustrated investors off their backs, kick their share prices out of the doldrums and pave the way for big bonuses.

We're in a real hole now, says JCB head Graeme Macdonald: The financial crisis of a decade ago "feels like a walk in the park" compared with the problems facing the global economy now, one of Britain's largest manufacturers has claimed.

Pay lifeline for staff at Carluccio's: Employees of Carluccio's were thrown a possible lifeline after administrators outlined plans to put the restaurant chain's 2,000-strong workforce on leave of absence.

Novacyt rushes to make virus tests available to hospitals: A London-listed biotechnology company is supplying more than 20 British hospitals with its coronavirus tests, but has admitted that its growth is being held back by manufacturing limitations.

Aston gets green light for change: Plans for a consortium led a Canadian billionaire to take a stake in Aston Martin Lagonda are on track.

Kier board among staff having salaries reduced: The sale of Kier's housebuilding business has been put on ice and about a third of the contractor and outsourcer's staff are to have their salaries cut.

Expect payment delay, landlords told:

Commercial landlords expecting retailers to start paying full rent after the end of the government's three-month moratorium are in need of a "severe reality check", surveyors have warned.

Smith & Nephew abandons guidance after only a month:

A FTSE 100 medical equipment maker has withdrawn the financial guidance that it issued only last month.

Hammerson scraps dividend as retail rent income slumps:

The owner of the Bullring shopping centre in Birmingham and Brent Cross in north London has scrapped its final dividend after retailers paid only 37% of their quarterly rent.

Ritz's new owner vows to retain staff during crisis:

The new Middle Eastern owner of The Ritz in London has vowed to retain all the luxury hotel's employees on full pay for the duration of the coronavirus closure.

First Great Western given green light to continue train services to southwest:

The government has extended its agreement with First Group to operate trains on the Great Western main line between London and the southwest for at least another three years.

Fabergé owner Gemfields cancels gemstone auctions:

The owner of the fabled Fabergé jeweller has cancelled six key gemstone auctions because of travel restrictions on potential buyers.

The Independent

Coronavirus: Aerospace firms and Formula 1 teams to begin producing 10,000 ventilators this week:

Rolls-Royce, Airbus and Microsoft are among 14 companies joining together to begin production of thousands of ventilators this

week to help save the lives of patients with Covid-19.

Coronavirus: Oil prices fall to lowest level in 18 years as pandemic impact compounded by Saudi-Russian price war:

Oil prices dropped to their lowest levels in 18 years as the global economy looked set to enter a coronavirus-induced recession.

Coronavirus: Rich Nordic economies are in deep shock following 660,000 job losses:

In one of the richest and most stable corners of the globe, well over half a million people are suddenly out of a job due to the economic standstill triggered by the spread of the coronavirus.

Financial Times

Energy groups seek help on payment holidays:

Energy companies have asked the U.K. government to back a loan scheme worth up to £100 million a month so they can offer payment holidays to households and businesses struggling to settle bills because of the coronavirus pandemic.

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BlackRock's Fink keeps door open to acquisitions:

BlackRock Chief Executive Larry Fink has raised the prospect of a return to dealmaking by the world's largest asset manager as it navigates upheaval in financial markets and intense competition.

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Japanese bank SMBC agrees cash infusion for Ares:

One of Japan's biggest banks is providing a \$384 million cash infusion to Ares Management Corporation, a U.S. investment group that has become a key part of the country's emerging non-bank "shadow" lending sector.

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EY quits as auditor for Travelex owner Finabl: EY has resigned as the auditor for Travelex owner Finabl, the troubled FTSE 250 financial services group that recently warned it was in danger of going out of business given a mounting accounting scandal and the impact of the coronavirus pandemic.

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Banks in talks with FCA over credit card payment deferrals: Britain's banks are asking regulators to relax the rules on credit card repayments as part of a series of measures to help customers cope during the coronavirus crisis.

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Big hedge funds raise money to capitalise on market turmoil: DE Shaw is raising \$2 billion in the first fundraising for its flagship vehicle in seven years, joining rivals Baupost Group and TCI Fund Management in a bid to capitalise on opportunities thrown up by market turmoil.

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Big names of U.K. engineering in push to make 30,000 ventilators: Some of the biggest names in U.K. engineering are pressing ahead with plans to build at least 30,000 ventilators, which are key to saving the lives of the worst-affected coronavirus patients.

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Gates Foundation and Wellcome Trust to fund Covid-19 drug trials: Three leading scientific institutions have embarked on trials to test whether existing drugs can be used to prevent coronavirus infections, as the accelerator funded by the world's two largest medical foundations makes its first investments.

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J&J and Abbott flag potential vaccine and rapid test: Two U.S. healthcare companies have brought new hope in the fight against coronavirus, with Johnson & Johnson announcing a potential vaccine that could be available early next year and Abbott Laboratories launching a rapid test kit.

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Top German ventilator company warns on global supply crunch: One of the world's largest makers of ventilators,

Drägerwerk, has warned that global demand for the machines that help severely ill coronavirus patients to breathe will outstrip supply, despite being on course to quadruple production this year.

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Aston Martin opens \$100 million credit line to avert cash crunch: Aston Martin has opened a fresh \$100 million credit line after warning the business will run out of money for its current spending plans within 12 months.

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Exor to invest \$200 million in transport start-up Via: Italy's Exor is set to invest \$200 million into transport software business Via, valuing the company at \$2.3 billion, according to two people familiar with the matter.

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EasyJet's Stelios slams critics over dividend: EasyJet founder Stelios Haji-Ioannou has lashed out at critics who have questioned his family's acceptance of a £60 million dividend this month from the low-cost carrier he created more than 20 years ago, which he has said risks insolvency unless it cancels a multibillion-dollar aircraft order from Airbus.

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Jeff Bezos's rocket company gets virus lockdown exemption: Blue Origin, the space exploration company founded by Amazon Chief Executive Jeff Bezos, is to continue operating through the coronavirus crisis after being deemed an "essential" business by the U.S. government.

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Airbnb pledges to cover some virus cancellation costs: Airbnb will pay out \$250 million to cover some of the costs of coronavirus cancellations, it said, in an apologetic letter sent to its hosts as it battles to stop them deserting the platform.

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Yum Brands raises \$600 million in first junk bond issue in weeks: Yum Brands, the owner of fast food franchises KFC, Taco Bell and Pizza Hut, has become the first junk-rated company to raise fresh capital from bond investors since the effects of the coronavirus brought issuance to a standstill in early March.

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Macy's, Gap and Kohl's put thousands on leave: The coronavirus employment crisis deepened when tens of thousands of U.S. retail workers at companies including Macy's, Gap and Kohl's were told that they would be temporarily laid off.

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Meituan Dianping warns of coronavirus hit: China's food delivery leader Meituan Dianping warned that its first-quarter revenue would shrink as a result of the coronavirus pandemic, which has halted the operations of restaurants, hotels and local businesses that rely on its "everything app" for deliveries and bookings.

To Read More Click [Here](#)

Coronavirus pushes Carluccio's and BrightHouse to collapse: Italian restaurant chain Carluccio's and rent-to-own retailer BrightHouse have collapsed into administration, putting 4,500 jobs at risk after government-enforced closures exacerbated problems at both groups.

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Ted Baker appoints Rachel Osborne as permanent Chief: Ted Baker has named Rachel Osborne as permanent Chief Executive, three months after she took the interim role at the struggling U.K. fashion chain.

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Tiger Global builds stake in TikTok-owner ByteDance: Tiger Global Management has built a stake in ByteDance, the Chinese owner of the viral video app TikTok, joining other global investors such as SoftBank and Sequoia Capital jostling to capitalise on the explosive popularity of short-form video.

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Bus companies to be promised coronavirus bailout this week: Bus companies will this week be promised hundreds of millions of pounds to deal with plummeting passenger numbers in the latest bailout by the U.K. government since the start of the coronavirus pandemic.

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Aircraft lessors cheered by U.S. airline bailout: Companies that lease aircraft are hopeful that government stimulus funds can help steady struggling U.S. airlines, as half

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of carriers worldwide seek rent relief on their planes.

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U.K. government agrees rail deals with Govia and First Group: The U.K. government has ended the limbo hanging over Southeastern and Great Western railway lines by giving the existing operators new contracts to ensure that a skeleton train service continues on both lines.

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Lex:

Indian outsourcers: victims of de-globalisation: Revenue will drop sharply following the hiatus in contract signings.

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U.S. grocers: cart these home: Despite being a low-margin business, supermarkets are surging thanks to 'pantry-loading'.

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Airbnb: cancel culture: Home rentals group has means to survive without listing for another year.

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Lombard:

Investors must think faster to catch up with anarchic government: The government has cancelled school and is forcing parents to be innovative and mark their children's homework. It should itself score highly for ripping up the rule books that govern companies and their relations with shareholders. Oh that investors could have been so nimble in their thinking as companies scrabble for cash and to stay afloat.

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The Daily Telegraph

Oil prices could turn negative as world runs out of storage: Oil prices could turn negative in some parts of the world as demand continues to collapse, with Russia

and the U.S. set to be the biggest losers from the crash.

M&S offers £30 food boxes with 20 household essentials: Marks & Spencer has become the latest grocer to sell food boxes online as part of a national effort to protect the vulnerable and keep supplies moving.

Carmakers in crisis as virus threatens to burst leasing bubble: Even before car dealerships were ordered to close by the Government, many had already decided to shut their doors and close down forecourts.

Troubled Blackmore Bond warns investors of coronavirus delay: Troubled savings firm Blackmore Bond has warned investors waiting for delayed interest payments that a property market crunch will make it even harder to find cash.

Daily Mail

Pressure growing on U.K.'s largest banks to cut heads' bonuses and shareholder payouts to preserve cash in face of growing coronavirus crisis: Pressure is growing on the U.K.'s largest banks to cut heads' bonuses and shareholder payouts to preserve cash in the face of the growing coronavirus crisis.

Easyjet's founder goes to war with struggling airline over its plans to spend £4.5 billion on aircraft: Easyjet's founder has gone to war with the struggling airline over its plans to spend £4.5 billion on aircraft.

The Scotsman

Coronavirus: Edinburgh-based GTS Solutions helping protect home workers: A Scottish social enterprise business has joined forces with a Swiss security firm to help businesses tackle the growing risk of cyber-crime amid the coronavirus crisis.

Coronavirus: Scotland's rural firms to suffer 'disproportionate' Covid-19 impact: More support is needed for Scotland's rural businesses as they will suffer a "disproportionate" impact due to

Covid-19, Perth-based GrowBiz has warned.

Edinburgh fintech offers secure email service for free to combat rise in cybercrime: Edinburgh fintech Origo is teaming up with a cyber security specialist to offer its encrypted email service for free during the coronavirus pandemic, as authorities warn businesses and the public of an increasing threat from cyber criminals.

Coronavirus: Edinburgh-based Care Sourcer launches Covid-19 taskforce: Care Sourcer, which describes itself as the U.K.'s first comparison and matching site for elderly care, has launched a Covid-19 industry taskforce in the face of what it is calling the worst health crisis facing the country in generations.

Glasgow's Macfarlane cuts board members' pay and cancels dividend amid Covid-19 downturn: Macfarlane Group, the Glasgow packaging and labelling business, has cancelled its annual dividend and announced directors will take a pay cut to combat a predicted "marked slowdown" in market activity.

Morrisons to give away £10 million worth of groceries to food banks: Fruit and Veg teams to work hour extra every day in new initiative during Covid-19 pandemic

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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.

If you are unsure about dealing in shares and other equity investments, you should contact your financial adviser as these types of investments may not be suitable for everyone.

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