

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	5,965.8	↓ -7.7%	-10.4%	-20.1%	-16.0%	S&P 500	2,746.6	↓ -7.6%	-11.1%	-17.5%	0.1%
FTSE 250	17,547.2	↓ -6.4%	-9.1%	-18.4%	-7.9%	DJIA	23,851.0	↓ -7.8%	-10.7%	-18.0%	-6.3%
DJSTOXX 50	2,788.7	↓ -7.5%	-9.3%	-19.9%	-7.9%	Nasdaq	7,950.7	↓ -7.3%	-11.2%	-16.5%	7.3%
FTSEurofirst 300	1,323.7	↓ -7.6%	-9.9%	-20.1%	-9.2%	Nikkei 225*	19,643.9	↓ -0.3%	-7.7%	-17.3%	-6.3%
German DAX 30	10,625.0	↓ -7.9%	-10.4%	-21.4%	-7.3%	Shanghai Composite*	2,961.5	↑ 0.6%	0.5%	2.3%	-0.9%
France CAC 40	4,707.9	↓ -8.4%	-11.7%	-21.9%	-10.0%	DJIA at London close	24,607.2				*Time - GMT 4:30

FTSE 100



UK Market Snapshot

UK markets finished sharply lower yesterday, as a sharp drop in crude oil prices due to a price war between Saudi Arabia and Russia stoked global recession fears. Anglo American plunged 10.7%, after a top broker lowered its target price on the stock to 2,300.0p from 3,000.0p and downgraded its rating to 'Outperform' from 'Top Pick'. Vodafone Group plummeted 9.1%. The telecommunication giant received an approval from the European Commission for the merger of its Italian towers with INWIT's passive network infrastructure. Informa tumbled 5.4%, following a rating downgrade on the stock to 'Hold' from 'Buy'. Clarkson declined 4.0%, after the company warned that its first half performance will be impacted due to coronavirus outbreak. Phoenix Group Holdings dropped 3.4%. The company reported a rise in its gross premiums for 2019. The FTSE 100 declined 7.7%, to close at 5,965.8, while the FTSE 250 fell 6.4%, to end at 17,547.2.

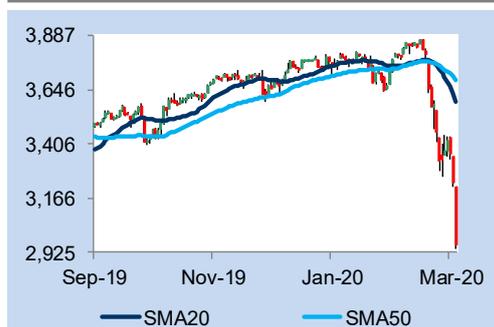
DJIA



US Market Snapshot

US markets closed significantly lower yesterday, as a jump in the new coronavirus cases and a steep fall in crude oil prices triggered a broad-based sell-off. Energy giants, Chevron, Marathon Oil and Apache tanked 15.4%, 46.9% and 53.9%, respectively, following a plunge in oil prices. Boeing plunged 13.4%, after the Federal Aviation Administration stated that the wiring layout of the company's grounded 737 Max jet violates wiring-safety standards aimed at preventing short-circuits. Uber Technologies plummeted 11.1%, following reports that the company is planning to set up a fund to compensate drivers affected by the coronavirus. Twitter dropped 3.0%, after the social media company reached an agreement with investment firms, Silver Lake and Elliott Management, over the role of its Chief Executive Officer (CEO), Jack Dorsey. The S&P 500 slumped 7.6%, to settle at 2,746.6. The DJIA plunged 7.8%, to settle at 23,851.0, while the NASDAQ plummeted 7.3%, to close at 7,950.7.

DJ Euro STOXX50



Europe Market Snapshot

European markets finished considerably lower yesterday, as escalating concerns over the economic impact of the coronavirus outbreak continued to weigh on the investor sentiment. Energy firms, TOTAL, Eni and Equinor plummeted 16.6%, 20.9% and 21.7%, respectively. Lenders, Deutsche Bank, BNP Paribas and Commerzbank tumbled 12.0%, 12.3% and 14.6%, respectively. Nordex tanked 15.8%, after the wind turbine maker reported lower than expected earnings for the full year. Ams plunged 11.8%, after the sensor maker announced the departure of its Chief Financial Officer (CFO), Michael Wachslar, effective from 31 May 2020. Novartis declined 4.1%. The drugmaker received an approval from the US Food and Drug Administration (FDA) for its Isturisa oral tablets designed to treat Cushing's disease. The FTSEurofirst 300 index slipped 7.6%, to settle at 1,323.7. The German DAX Xetra fell 7.9%, to settle at 10,625.0, while the French CAC-40 shed 8.4%, to close at 4,707.9.

Asia Market Snapshot

Markets in Asia are trading mostly higher this morning. In Japan, JGC Holdings, Chiyoda and Inpex have declined 3.2%, 4.5% and 5.8%, respectively. Meanwhile, Ricoh, Toho Zinc and Nomura Holdings have advanced 5.1%, 5.7% and 6.5%, respectively. In Hong Kong, PetroChina, Wharf Real Estate Investment and CITIC have gained 3.3%, 3.9% and 4.5%, respectively. Moreover, China Mengniu Dairy, China Unicom Hong Kong and Sino Biopharmaceutical have risen 0.2%, each. In South Korea, NAVER, LG Electronics and S-Oil have added 2.7%, 4.3% and 5.2%, respectively. Meanwhile, Hyundai Motor, Kia Motors and Hanmi Science have dropped 2.4%, 2.6% and 4.2%, respectively. The Nikkei 225 index is trading 0.3% lower at 19,643.9. The Hang Seng index is trading 1.8% up at 25,494.7, while the Kospi index is trading marginally higher at 1,955.3.

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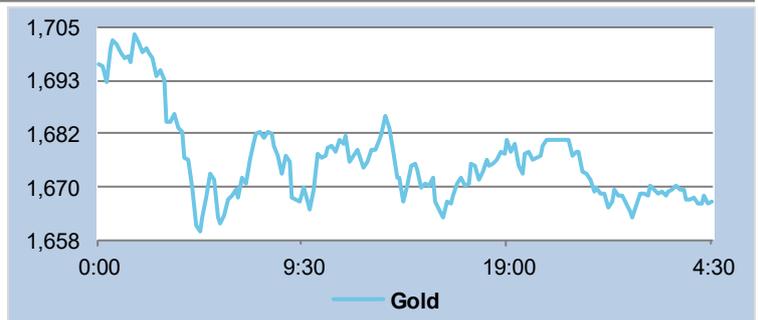
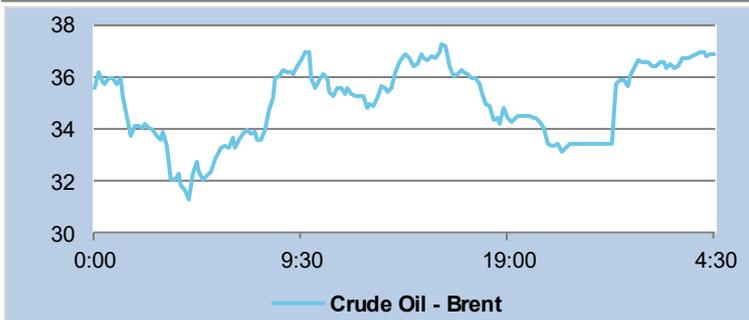
UK

Company Name	Results	Currency	Full Year Consensus	
			Estimated EPS	Estimated Revenue (Mn)
A & J Mucklow Group Plc	Final	GBP	0.37	19,566.60
John Wood Group Plc	Final	USD	0.47	10,187.57
Informa Plc	Final	GBP	0.51	2,865.18
TP ICAP Plc	Final	GBP	0.33	1,822.00
Standard Life Aberdeen Plc	Final	GBP	0.18	1,617.25
John Menzies Plc	Final	GBP	0.28	1,349.00
DFS Furniture Plc	Interim	GBP	0.17	991.50
Close Brothers Group Plc	Interim	GBP	1.32	847.17
Ultra Electronics Holdings Plc	Final	GBP	1.16	805.36
Midwich Group Plc	Final	GBP	0.28	683.67
Cairn Energy Plc	Final	USD	0.15	520.82
Forterra Plc	Final	GBP	0.26	379.11
LSL Property Services Plc	Final	GBP	0.26	312.67
H&T Group Plc	Final	GBP	0.38	158.50
STV Group Plc	Final	GBP	0.44	124.67
Simplybiz Group Plc/The	Final	GBP	0.13	64.05
Team17 Group Plc	Final	GBP	0.12	61.24
Target Healthcare REIT Plc	Interim	GBP	0.10	46.35
Gresham Technologies Plc	Final	GBP	0.02	25.00
Brand Architekts Group Plc	Interim	GBP	0.09	20.50
PRS REIT Plc/The	Interim	GBP	0.03	15.25
e-Therapeutics Plc	Final	GBP	(0.01)	0.50
Arix Bioscience Plc	Final	GBP	(0.08)	(15.77)
BioPharma Credit Plc	Final	USD	-	-
Standard Life Investment Property Income Trust Ltd	Final	GBP	-	-
Polar Capital Global Financial	Final	GBP	-	-
French Connection Group Plc	Final	GBP	-	-
Maestrano 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 7.33% or \$2.52 higher at \$36.88 per barrel, ahead of the American Petroleum Institute's weekly oil inventory data, scheduled to be released later today. Yesterday, the contract declined 24.1% or \$10.91, to settle at \$34.36 per barrel, after the Saudi Arabia and Russia began a price dispute that stoked fears about the global oil supply.
- At 0430GMT today, Gold futures contract is trading 0.53% or \$8.90 lower at \$1666.80 per ounce. Yesterday, the contract climbed 0.2% or \$3.30, to settle at \$1675.70 per ounce, as investors sought shelter in the safe-haven commodity, amid mounting concerns over the economic slowdown and following weakness in the US Dollar.



Currency

- At 0430GMT today, the EUR is trading 0.54% lower against the USD at \$1.1388, ahead of the Euro-zone fourth quarter GDP data, due in a few hours. Additionally, investors await the US NFIB business optimism index for February, slated to be released later today. Yesterday, the EUR strengthened 1.47% versus the USD, to close at \$1.1450. On the data front, the Euro-zone investor confidence index declined in March, whereas the German industrial production rose more than expected in January. Meanwhile, the German trade surplus narrowed in January.
- At 0430GMT today, the GBP is trading 0.37% lower against the USD at \$1.3068. Yesterday, the GBP strengthened 0.53% versus the USD, to close at \$1.3117. On the data front, the UK retail sales across all sectors dropped more than expected in February.



Bitcoin

- At 0430GMT today, BTC is trading 0.72% higher against the USD at \$7917.82. Yesterday, BTC declined 13.98% against the USD to close at \$7861.20. In major news, cryptocurrency exchange, Kraken announced its plan to expand its operations in the Indian market, after the country's Supreme Court lifted the ban imposed by the Reserve Bank of India on banking services for cryptocurrency businesses. In a key development, Bittrex Global announced the launch of new product features on its platform that will allow its users additional benefits, including credit card support and upgrades to its mobile app.

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FTSE All Share Index- Performance

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UK Worst Sector Performers

Sector	Current Price	1D Change	1D (%) Change	1M (%) Change	1Y (%) Change
Oil & Gas Producers	4948.13	-1136.20	-18.7%	-33.0%	-43.1%
Oil Equipment & Services	5305.56	-1071.93	-16.8%	-30.7%	-51.4%
Industrial Metals	2270.75	-339.84	-13.0%	-37.1%	-59.1%
Automobiles & Parts	3064.66	-424.41	-12.2%	-36.3%	-52.4%
Mining	13239.63	-1566.56	-10.6%	-25.8%	-29.4%

Key Economic News

UK retail sales across all sectors dropped more than expected in February

In the UK, retail sales across all sectors fell 0.40% on a YoY basis in February, compared to a flat reading in the prior month. Markets were anticipating retail sales across all sectors to drop 0.20%.

Euro-zone investor confidence index dropped in March

In the Euro-zone, the investor confidence index fell to a level of -17.10 in March, lower than market expectations of a fall to a level of -5.00. The index had recorded to a level of 5.20 in the previous month.

German trade surplus narrowed in January

In Germany, the seasonally adjusted trade surplus narrowed to €18.50 billion in January, more than market expectations of a trade surplus of €15.40 billion. Germany had registered a trade surplus of €19.00 billion in the previous month.

German industrial production rose more than expected in January

In Germany, the seasonally adjusted industrial production rose 3.00% on a MoM basis in January, more than market expectations for a rise of 1.50%. In the prior month, industrial production had fallen by a revised 2.20%.

Chinese CPI rose in February

In China, the consumer price index (CPI) advanced 0.80% on a MoM basis in February. In the previous month, the CPI had risen 1.40%.

Share Tips, Bids and Rumours

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- [The Times \(Tempus share tips\)](#): "Avoid" energy company stocks as sustained low oil price would eat into profits, reduce investment and, in some cases, threaten dividends.
- [The Guardian](#): Jingye Group, the steelmaker, has completed its buyout of British Steel.
- [The Daily Telegraph](#): Tesco is selling its supermarkets in Thailand and Malaysia in a £8.2 billion deal.
- [The Times](#): GKSD Investment Holding, second bidder for NMC Health, has walked away, increasing uncertainty for the struggling hospitals group.
- [Financial Times \(Comment\)](#): Music stops for stock markets' great bull run.
- [The Daily Telegraph \(Comment\)](#): Coronavirus may be more destructive than the Lehman crisis.

Newspaper Summary

The Times

Boris bounce ends as coronavirus fears shatter business confidence: A post-election "Boris bounce" in the confidence of business leaders has been destroyed by the coronavirus outbreak, a new survey has revealed.

Dispute hits Saudi Aramco shares hard: Shares in Saudi Arabia's state oil group have fallen below the float price, three months after their launch in the world's largest initial public offering.

U.S. shale oil producers routed in price slide: The value of America's top shale oil producers was decimated after investors fled the sector because of concerns that the fall in the price of oil could cause businesses to collapse.

Apple iPhone sales down 61% in China: Sales of the iPhone in China fell 61% last month as the coronavirus epidemic took hold, a report showed.

Rough waters on horizon, shipping group Clarkson warns: A shipping services group led the latest corporate warnings over coronavirus as it cautioned that the outbreak would suppress trading over the coming months.

Betfred pair take punt on rival William Hill: The billionaire brothers behind Betfred set the hares running after declaring a 3.03% stake in rival bookmaker William Hill.

Boeing hit by new 737 Max safety issue: America's aviation safety watchdog is to order Boeing to rewire its 737 Max jets in the latest setback to the troubled programme.

Onthemarket board sacks founding Chief Executive Ian Springett: A troubled estate agent-backed property portal has sacked its Chief Executive with immediate effect.

Dividend cut looms as Abcam expands: One of Britain's most promising biotechnology companies has raised the prospect of a dividend cut as it boosts investment and pursues acquisitions.

Incoming head sees a way for Phoenix to rise again: The new Chief Executive of Phoenix, which buys up books of life insurance and pensions policies, said that there was scope to grow by offering retirement savings and advising people on how to manage their existing policies.

The Independent

Millions believe they have 'great idea' for business but could not set one up, poll claims: Millions of people think they have a "great" idea for a business but half think they would not be able to set one up, a poll has found.

Coronavirus 'pushing Europe into recession', say economists: Coronavirus is pushing Europe into recession as the rapidly spreading outbreak takes a heavy toll on businesses and consumer confidence, economists have warned.

Coronavirus: Markets in meltdown as oil prices plunge to biggest drop in decades: Global markets have plunged after oil prices suffered their biggest drop in decades, with the launch of a price war between oil-producing Saudi Arabia and Russia compounding fears over coronavirus.

Financial Times

Investors query Blackstone's Saudi-led oil pipeline deal: One of the first deals signed by Blackstone's Saudi Arabia-backed infrastructure fund appeared to investors to be in jeopardy, after the kingdom's oil price war caused a collapse in the shares of U.S. pipeline company Tallgrass Energy.

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U.K. funds exposed to energy companies hit hard: Funds that focus on energy companies have been especially badly hit by the market sell off.

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Battle over oil discovery is test case for Mexico investors: Energy companies trying to do a deal with Pemex to share one of Mexico's biggest oil discoveries accuse the state giant of dragging its feet to win control of the project, in a test case for foreign investment under President Andrés Manuel López Obrador.

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Junk bonds hit by slump in oil prices: The riskier end of the corporate bond market has suffered a sharp blast of nerves in response to the slump in oil, with prices dropping and the cost to investors of insuring against defaults rising higher in Europe and the U.S.

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Russia says it can deal with pain of a Saudi oil price war: Russia said it could withstand low oil prices for as long as a decade, setting the stage for a prolonged battle with Saudi Arabia after talks over further production cuts collapsed, leading to

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the biggest one-day fall in prices since the 1991 Gulf war.

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U.S. bank regulators urge relief for borrowers over coronavirus: Federal bank regulators urged U.S. banks to work “constructively” with borrowers affected by the coronavirus outbreak, in a joint announcement similar to ones issued after 9/11 and Hurricane Katrina.

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FCA to review pricing of market data: U.K. markets regulators are to review whether stock exchanges and trading venues are charging their customers a fair price for market data, as those who control the valuable information come under greater scrutiny.

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Indian prosecutors accuse Yes Bank co-founder of taking kickbacks: Indian criminal investigators have accused Yes Bank’s co-founder Rana Kapoor of receiving illicit kickbacks in 2018 to provide funds to a now bankrupt housing finance company, raising new questions about the troubled institution’s lending practices.

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Aon to buy Willis Towers Watson in \$30 billion deal: Aon is to buy Willis Towers Watson for \$30 billion in an all-share deal that will combine the world’s second and third-largest insurance brokers into a new industry leader.

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Betsy Duke steps down as Wells Fargo Chair: Wells Fargo’s board Chair and another longstanding board member resigned ahead of this week’s hearings scrutinising the bank’s 2016 fake accounts scandal.

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OakNorth doubles profits but sees slowdown in growth: SoftBank-backed lender OakNorth Bank almost doubled its profits in 2019 but slowed down its pace of expansion as economic concerns discouraged business borrowing.

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NY judge freezes hedge fund manager Falcone’s assets: A New York judge has frozen assets belonging to hedge fund

manager Philip Falcone and his Harbinger Offshore fund after he failed to pay millions in legal fees to a Manhattan law firm that defended him in high-stakes litigation against U.S. regulators.

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Prudential looks to float or sell stake in U.S. unit: Prudential is this week set to unveil plans to either float or sell a stake in Jackson, its U.S. business, as it responds to demands from activist investor Dan Loeb that the 172-year-old insurer should break itself up, said people with knowledge of the situation.

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Citi to cut ties with two-thirds of foreign exchange platforms: Citigroup, one of the largest dealers in the \$6.6 trillion-a-day foreign exchange market, has confirmed it is severing ties with nearly two-thirds of the trading platforms it uses as part of an effort to cut costs.

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Tech groups link with NHS against false virus advice: Technology companies are to work with U.K. health authorities to counteract misleading information about coronavirus, as inaccurate claims about the disease proliferate online.

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Gruppo San Donato withdraws from bidding for NMC: A company affiliated to Gruppo San Donato, Italy’s private healthcare group, has withdrawn from bidding for NMC Health, the Middle East-focused healthcare company.

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Chinese buyer of British Steel to pursue French arm: British Steel’s Chinese buyer intends to continue pursuing the company’s French arm after completing the takeover of the rest of the group and saving 3,200 jobs.

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Coronavirus threatens to wipe out third of Nissan profits: The coronavirus epidemic is threatening to wipe 35% off Nissan’s annual profits, putting its fractured alliance with Renault under serious financial strain.

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U.K. government plots audit laws in ‘Kingman 2’: The U.K. government is

finalising plans for a consultation on proposed laws that would overhaul audit regulation and force company directors to be responsible for certifying the accuracy of financial statements.

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Amazon offers to sell its technology to other retailers: Amazon is starting to sell its cashier-less shopping technology to other retailers, offering them camera systems that automatically record what shoppers pick up and walk out with.

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Cineworld’s biggest shareholder GCT cuts stake by a third: Cineworld’s biggest shareholder has cut its stake in the cinema chain by a third as part of a refinancing deal, after fears that coronavirus would force cinemas to close sent the group’s shares down to near record lows.

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Tesco to sell Thai and Malaysian operations for \$10.6 billion: Tesco has agreed to sell its south-east Asian operations to Thai conglomerate Charoen Pokphand for \$10.6 billion in cash, taking another big step back from its international expansion and setting the stage for a lavish return of cash to investors.

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Pret puts cost of food safety overhaul at £20 million: Pret A Manger spent £20 million last year on anti-allergy measures, including full ingredients labelling, as it overhauled safety measures after the deaths of two people who had eaten its products.

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Suntory Chief warns of coronavirus hit: The Chief Executive of Suntory has warned that the coronavirus outbreak is hitting alcohol consumption, which will eventually impact on profits at the third-largest spirits maker, adding that he expects the turmoil in China to trigger a return of production to Japan.

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Twitter and Elliott strike deal that keeps Jack Dorsey at helm: Elliott Management and Twitter have agreed a ceasefire that will see Jack Dorsey keep his post as Chief Executive of the technology group, while the company prepares a \$2 billion share

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buyback programme partly funded by private equity firm Silver Lake.

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Robinhood faces third outage since start of last week: Robinhood, the stock trading app, suffered its third outage since the start of last week as U.S. stocks fell sharply.

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Australia privacy watchdog sues Facebook over data breach: Australia's privacy watchdog is suing Facebook over its role in the Cambridge Analytica scandal, which involved harvesting the personal data of tens of millions of people from the social media platform for political advertising purposes.

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Sunak announces £1 billion deal to boost mobile 'not spots': Rishi Sunak, the Chancellor, will this week announce a £1 billion deal with the mobile phone industry to improve patchy network coverage, and confirm long-promised funding for a £5 billion rollout of the next generation of broadband for rural areas.

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Lex:

Aon/Willis: a bad day for a big deal: Shareholders should step back sceptically from an offer launched amid a market rout.

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Twitter/Elliott: peace in our time: Investors could welcome a bid offer at an appropriate premium.

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FCA/LSE: high margins raise eyebrows: Probe should prompt heart-searching at London Stock Exchange.

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Lombard:

Changing times as Tesco cashes in on aversion to risk: Timing is all. Tesco's \$10.6 billion sale of its Thai operations has little to do with coronavirus or the plunge in the oil price. It has even less to do with the U.K.'s leading grocer rationing UHT milk and dried pasta to customers emptying its shelves in the U.K. But Tesco was about

the only share in the FTSE 100 to rise. The sale — dubbed by Tesco as an opportunistic exercise in de-risking and returning cash to investors — is everything to do with the defensiveness of selling food in times of crisis and the instinct to retrench.

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Daily Mail

Aston Martin slides 21.4% as upsurge in coronavirus cases plagues car companies across the world: Aston Martin's stock was stuck in reverse as car makers across the world were battered by the upsurge in coronavirus cases.

IMF urges governments and central bankers to take action to protect businesses: The International Monetary Fund has piled pressure on governments and central bankers around the world to do more to combat the economic fallout of Covid-19.

Cinema tycoons have licence to sell shares: Greidinger family slashes stake in Cineworld after 007 delay: The Greidinger family has slashed its stake in Cineworld by a third after the cinema chain's share price plummeted over coronavirus worries.

Activist Coast Capital ramps up its attack on First Group demanding it dump its U.S. operations: Activist investor Coast Capital has renewed its assault on the board of First Group.

The Scottish Herald

Markets shaken by oil shock as FTSE loses £125 billion: A bloodbath stained trading floors across the world as traders reacted to a huge drop in the price of oil when Riyadh launched the first salvo in an oil price war against Russia.

Iain Percy in bid to make U.K. world leader in eco-friendly ferries: A double Olympic gold medallist is skipping a bid to make the U.K. a world leader in zero-emissions passenger ferries.

The Scotsman

Aberdeen's Dynamic Edge acquires Hampshire IT business: Aberdeen-based technology business Dynamic Edge has become a £5 million turnover firm and

extended its geographical reach after the acquisition of Hampshire-based IT business Tekkers IT Solutions.

Allied Vehicles co-founder Michael Facenna exits Glasgow business: Michael Facenna, the co-founder of Allied Vehicles Group, has exited the Glasgow business, leaving it in the ownership of his brother and nephews.

Aberdeen tech start-up expands with Edinburgh office after oversubscribed fundraiser: An Aberdeen start-up which provides a platform for micro-internships is expanding into the Central Belt after an oversubscribed funding round.

RBS unveils £350 million pot to help coronavirus-hit Scots firms: Royal Bank of Scotland (RBS) has announced a £350 million funding pot as well as other measures to support Scottish businesses as they face the increasing knock-on effect of the spread of coronavirus.

Nine Scottish care homes sold to property trust in £47 million deal: Nine Scottish care homes are set to change hands in a sale-and-leaseback agreement worth £47.5 million.

Simpsons Malt thanks whisky and beer sectors for earnings rise: Simpsons Malt has unveiled increased sales and earnings for 2019, hailing strong results in its malting and agricultural arms.

Tesco Bank appoints Edinburgh-based Chief Information Officer: Tesco Bank has appointed Gary Balmer as its new Chief Information Officer, based at the firm's Edinburgh headquarters.

Glasgow takeover sees English business advisory firm move into Scotland: An English-based business advisory firm has made its first move into the Scottish market with a deal to acquire a Glasgow insolvency and restructuring practice.

Aberdeen energy services giant Wood seals £250 million nuclear sale to Jacobs: Wood, the Aberdeen-headquartered energy and engineering services heavyweight, has sealed the sale of its nuclear business to U.S. firm Jacobs for £250 million.

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