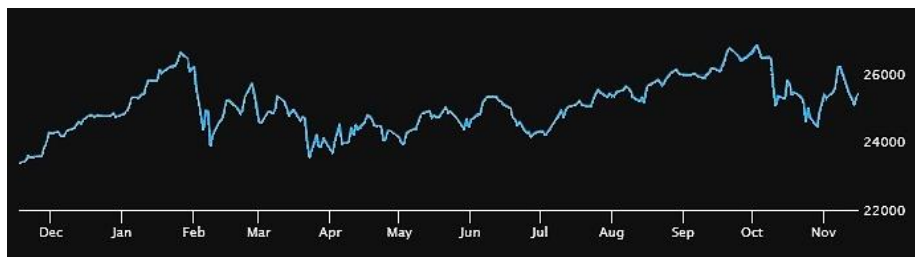


HEADLINES

US MARKETS

US stocks rose on Monday after the US and Chinese Presidents agreed to a 90-day truce in the trade war. Global trade bellwethers Boeing and Caterpillar rose 3.8% and 2.4% on the news, lifting both the Dow and the S&P's industrial index. Energy stocks climbed 2.3% after oil prices bounced back following news of a production cut in Alberta, Canada, and ahead of the OPEC meeting which is expected to result in a supply cut. Shares in carmakers were also higher following the developments over the weekend; Ford, General Motors, and Tesla rose 2%, 1.4%, and 2.3%. Meanwhile, tech stocks rose with all five members of the FAANG group posting gains. Amazon, which closed 4.9% higher, briefly became the most valuable company on Wall Street in intraday trade. In dealmaking news, Nexstar Media Group agreed to buy peer Tribune Media Co. The two stocks gained 6.9% and 11.7% respectively. On the economic data front, construction spending fell for a third straight month, down 0.1% in October. The ISM manufacturing index rose to 59.3 last month, up from 57.7 the month before. The Dow, S&P 500, and NASDAQ gained 1.13%, 1.09%, and 1.51% respectively.

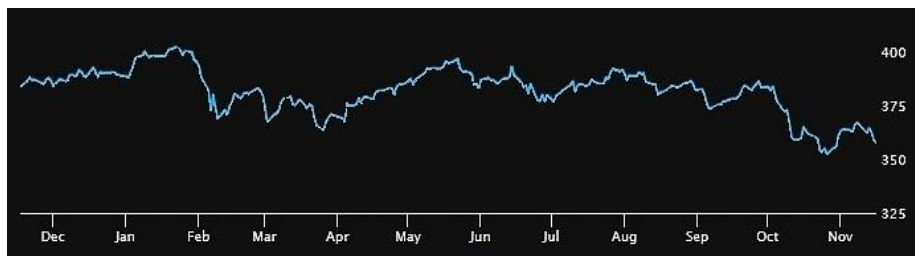
DOW JONES ONE-YEAR CHART



STOXX 600 ONE-YEAR CHART

EUROPEAN MARKETS

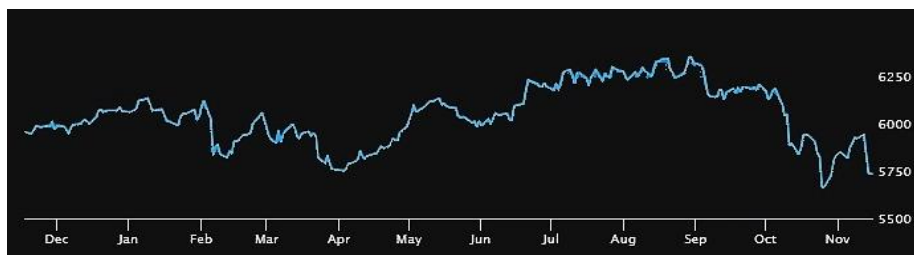
European markets were sharply higher as the market reacted positively to the truce between the US and Chinese leaders. Trade-sensitive sectors such as the autos and mining stocks gained 3% and 4% respectively. Miners Anglo American and Antofagasta jumped 7% and 7.9%, while Glencore rose 3.7%. Among the automakers, BMW and Daimler were at least 4.5% higher, while Volkswagen, Faurecia, and tire maker Continental added 2.9%, 5.6%, and 3.3% respectively. The tech sector popped 2.6% owing to gains among the chipmakers; AMS, Infineon, and STMicroelectronics were up between 3.8–6%. Oil stocks advanced as crude prices rose ahead of this week's OPEC meeting. Elsewhere on the market, shares in Dutch biopharma Argenx shot up by 12.7% after the company signed a deal with Johnson & Johnson affiliate Cilag. Meanwhile, GlaxoSmithKline tumbled 7.6% after agreeing to buy American cancer specialist Tesaro. The STOXX 600, DAX, and FTSE 100 rose 1.03%, 1.85%, and 1.18% respectively.



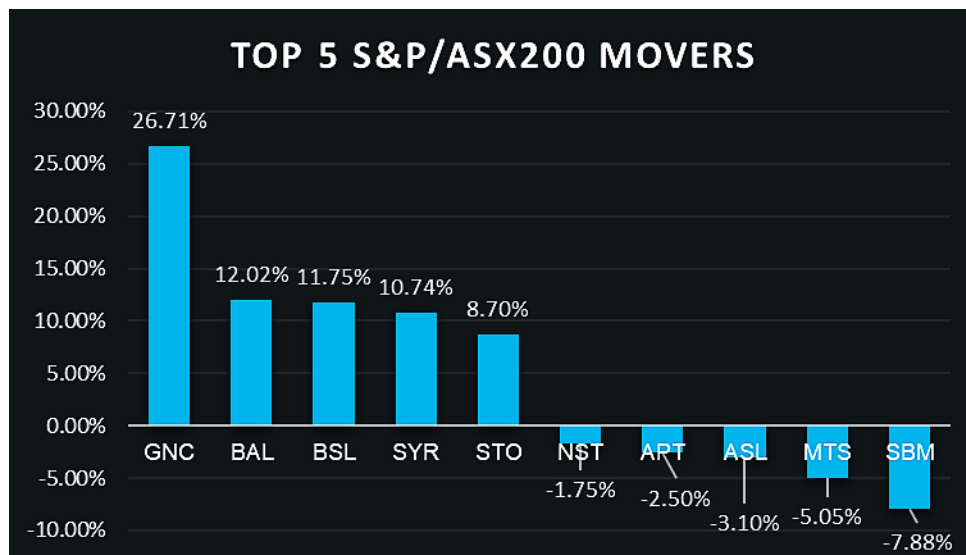
AUSTRALIAN MARKET

Australian shares advanced by 1.84%. The energy sector was a standout performer, up 4.6%, after receiving a boost from stronger oil prices ahead of Thursday's OPEC meeting. Among the individual stock movements in the market, GrainCorp's shares shot up by 26.7% after receiving a takeover bid from Long-Term Asset Partners. BlueScope Steel also performed well, rising 11.8%, after announcing a \$250 million buyback program, while graphite miner Syrah Resources rose 10.7% following a production update. On the other end of the index, Metcash fell by just over 5% as it reported that its half-year profit is up 3% but warned that its grocery unit faced challenging market conditions as its total sales came in flat from last year. Elsewhere, gold miners were on the backfoot as trade war concerns eased; St Barbara fell 7.9%, while Northern Star was off by 1.8%. In terms of data, the AiG performance of manufacturing index fell to 51.3 in November from last month's 58.3, while the CoreLogic home value index showed that home prices in capital cities fell 0.9% in November. Building approvals fell 1.5% in October and 13.4% year-on-year.

ASX 200 ONE-YEAR CHART



TOP MOVERS (PREVIOUS SESSION)



MARKET DATA

INDICES	CLOSE	CHANGE	FX	CLOSE	CHANGE	COMMODITIES	PRICE (US\$)	CHANGE	AU BONDS	RATES
ASX 200	5771	1.84%	AUD/USD	0.7357	0.70%	GOLD	\$1,230.73	0.69%	1 YEAR	1.92
SPI FUTURES	5761	-0.17%	AUD/NZD	1.062	0.06%	SILVER	\$14.36	1.33%	2 YEAR	1.98
DOW	25826	1.13%	AUD/EUR	0.6480	0.42%	PLATINUM	\$804.74	0.88%	3 YEAR	2.04
FTSE 100	7062	1.18%	AUD/GBP	0.5782	1.01%	BRENT CRUDE	\$61.85	5.23%	4 YEAR	2.10
NIKKE 225	22575	1.00%	AUD/YEN	83.60	0.77%	NATURAL GAS	\$4.37	-5.07%	5 YEAR	2.16
HANG SENG	27182	2.55%	EUR/USD	1.135	0.29%	COPPER	\$2.78	0.14%	10 YEAR	2.54
VIX	16	-9.02%	GBP/USD	1.2721	-0.24%	IRON ORE	\$66.38	0.70%	15 YEAR	2.70

WEEKLY ECONOMIC CALENDAR

TUES	04/12	WED	05/12	THURS	06/12	FRI	07/12	MON	10/12
	ANZ Roy-Morgan Weekly Consumer Confidence Index (DEC 2)		Gross Domestic Product (YoY) (3Q)		Trade Balance (OCT)		Euro-Zone Gross Domestic Product s.a. (YoY)		Home Loans (MoM) (OCT)
	RBA Interest Rate Decision (DEC 4)		ISM Non-Manufacturing / Services Composite (NOV)		Trade Balance (OCT)		Unemployment Rate (NOV)		JOLTS Job Openings (OCT)

TODAY'S CORPORATE ACTIONS

SECURITY	ACTIONS
A4N	RENAME: [CLL] COLLERINAC FPO NEW: [A4N] ALPHA HPA FPO
ABVDA	CHANGE OF DESC: ADV BRAKE FPO NEW: ADV BRAKE DEF SET
ABVDA	QUOTED: Reconstructed
ALL	QUOTED: Ex Dividend
BENPF	QUOTED: Ex Dividend
DTR	QUOTED: Ex Rights Issues
DTRR	NEW LISTING: [DTRR] DATELINE RTS23JAND
IKWNA	NEW LISTING: [IKWNA] IKWEZI DEF
IMFHA	CHANGE OF DESC: IMFBENTHAM FYM3WE NEW: IMFBENTHAM FYM3WET
KRR	RENAME: [KRC] KING RIVER FPO NEW: [KRR] KING RIVER FPO
KRROB	RENAME: [KRROB] KING RIVER OPT JUL20 NEW: [KRROB] KING RIVER OPT JUL20
NABPA	QUOTED: Ex Dividend
NXEOB	NEW LISTING: [NXEOB] NEWENERGY OPT NOV20
RDC	CHANGE OF DESC: REDCAPE DEF SET NEW: REDCAPE STAPLED
RMC	RENAME: [HOM] HOMELOANS FPO NEW: [RMC] RESIMAC FPO
RVS	NEW LISTING: [RVS] REVASUM DEF SET
SSNDA	QUOTED: Reconstructed
SSNDA	CHANGE OF DESC: SAMSON FPO NEW: SAMSON DEF SET
SWJDA	CHANGE OF DESC: STONEWALL FPO NEW: STONEWALL DEF SET
SWJDA	QUOTED: Reconstructed
SWJDB	CHANGE OF DESC: STONEWALL OPT OCT20 NEW: STONEWALL OPTOCT20D
SWJDB	QUOTED: Reconstructed
YAL	QUOTED: Ex Entitlement

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