
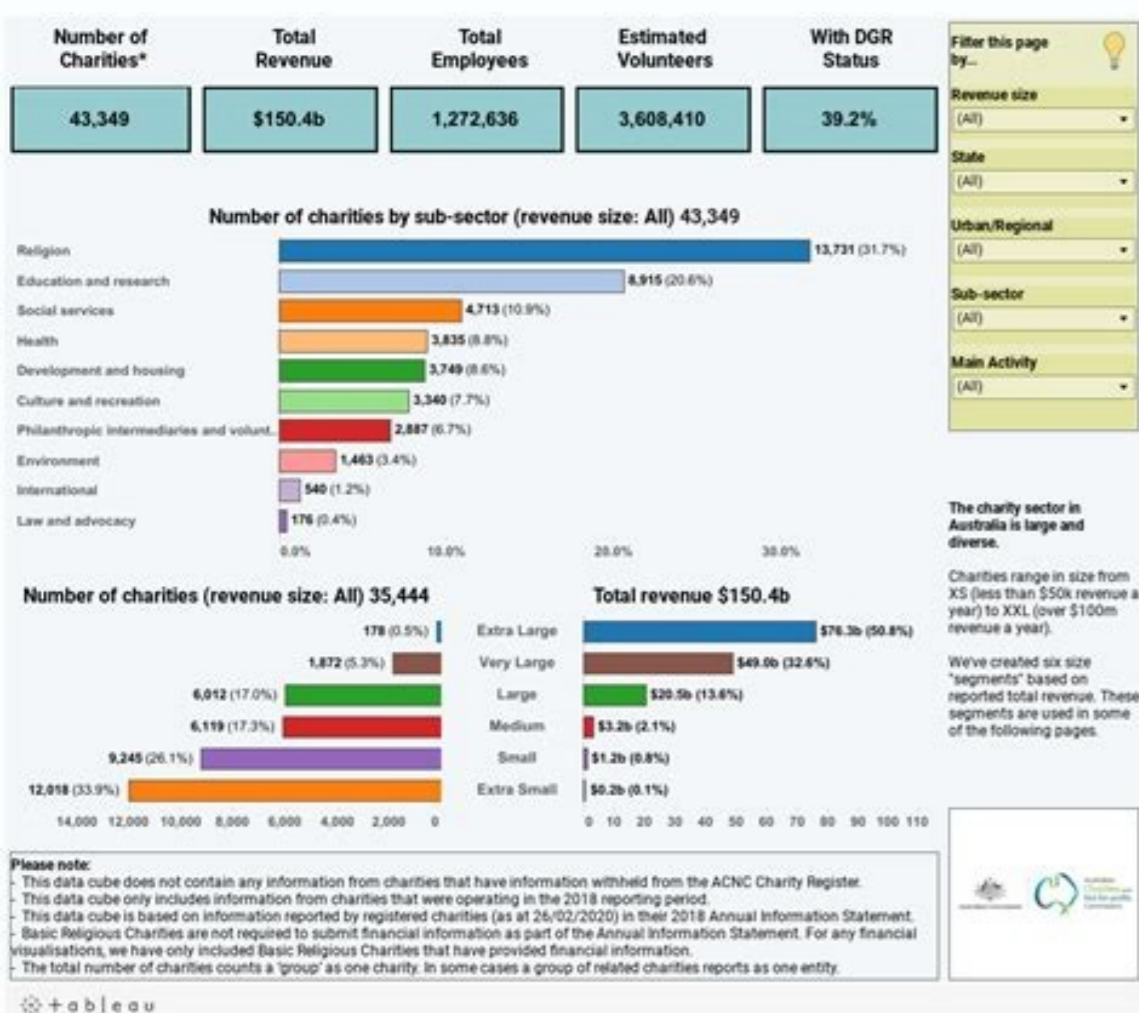


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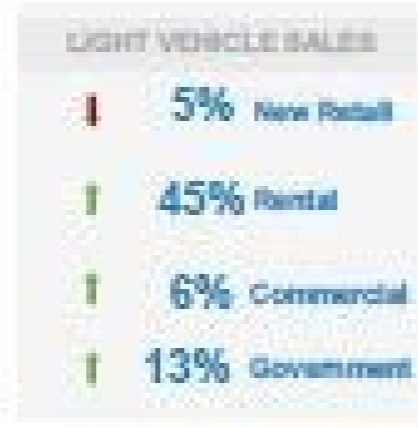


ECONOMIC INDICATORS

- While the economy grew a robust 6.1% in the second quarter, the best growth in almost 4 years, consumer sentiment fell in July to the lowest level since January. According to the University of Michigan, the decline in sentiment is being driven by consumer concern about tariffs. However, consumer spending on durable goods, including autos, increased likely due to a sense of urgency to buy ahead of potential import taxes. The second half of the year should deliver a solid but slower 3% growth.
- The Manheim Used Vehicle Value Index in July was 136.3, a 5.1% increase YOY and a new record. More affordable vehicles are seeing the greatest increases in values, with compact and midsize cars outperforming the overall market. This atypical summer Used price appreciation is partly a function of a strong economy, mounting affordability challenges for consumers that favor growth in Used at the expense of New, and fear of a new import tariff pushing vehicle prices even higher. Higher prices and declining supply are encouraging consumers to buy now rather than later.

DEMAND

- July New vehicle sales decreased 3% YOY, with one less selling day compared to July 2017. July SAAR came in at 16.7 million, flat versus last year's 16.7 million. July is just the second month this year to have new vehicle SAAR come in under 17 million. Retail sales decreased 6% YOY in July, but retail SAAR came in at the highest level this year at 14.7 million. Cars continue to see sharp declines as sales in July fell 17% YOY. Light trucks outperformed cars in July and were up 4% YOY. New vehicle sales year-to-date are up 1% versus last year.
- Cox Automotive estimates that Used vehicle sales increased by 3% YOY in July, even with one fewer selling day. The annualized pace of Used vehicle sales is up 1% YOY at 20.5M – a new peak for this expansion period.
- FCA and Subaru saw the biggest gains in July, with FCA earning a market share of 12.5% (increasing 1.1% YOY) and Subaru increasing 0.4% YOY to earn a market share of 3.3%.

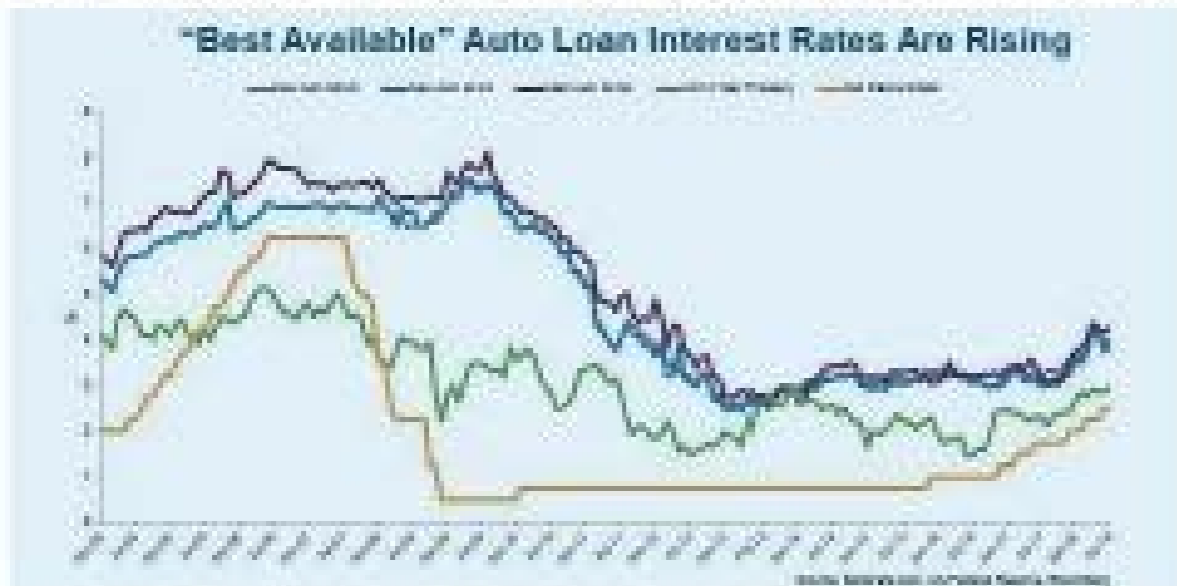


SUPPLY

- The days' supply for July was 65, down 3 days YOY and down 3 days from June. New vehicle inventories came in under 4M units for the third consecutive month and are at the lowest level in 23 months.
- The July average incentive spend was \$3,775, up 4% YOY and down 0.2% MOM. July average incentive monthly YOY growth was the lowest since March. Total industry incentive spend (at \$30B) is up 5% versus last year. The sales-weighted average incentive for the year is roughly \$3,740, which is up 5% YOY.

CREDIT

- The Fed's quarterly Senior Loan Officer Survey indicated that banks loosened standards for auto loans this quarter, breaking the streak of tightening in auto loan standards over 8 straight quarters. Correspondingly, banks saw an increase in demand. "Best Available" auto loan rates are edging up and have increased 90 basis points YOY.

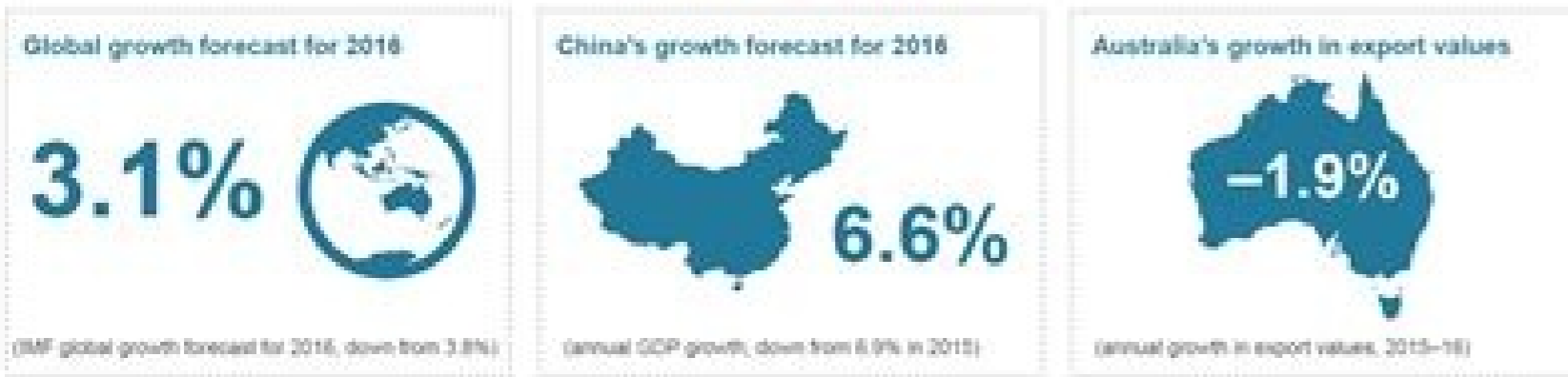


Source: Cox Automotive Industry Outlook Report, August 13, 2018

2 Economic conditions

Assessing Australian industry's economic performance over the past financial year, focusing on international, domestic and industry-specific developments.

International



Australia



Industry



Australian Government
Department of Industry,
Innovation and Science

Office of the Chief Economist

Australian Industry Report 2016



When are regions likely to close the economic gender gap?



Source: Global Gender Gap Report 2016, World Economic Forum

If the first report is presented orally, a written report must be presented within 84 hours of the first report. A prelude to the content of these rules can be found on the website of the Department of Interior Affairs of the Information Center for Information Technology and Infrastructure (here). This is contrary to the definition of critical assets of the aviation, which does not include a threshold and is based on the provision of a property air service or managed by an airplane operator. As an example, the rules projects set the threshold of electricity production at 30 MW for a critical electrical system. Critical Cybersecurity Incidents, must be reported within 12 hours from the time the responsible entity is aware of the event. Significant changes have been approved to the law regarding the security of critical infrastructures in Australia, including improving the reporting requirements of cybersecurity accidents and the inclusion of additional asset classes. With only 28 days to respond, we recommend potentially interested organizations to immediately start working to: understand the scope of laws to your assets and your activities. This obligation will apply to the remaining 12 activities of activity once the rules defining the new critical infrastructures. This will have an immediate impact on foreign investments in entities involved in the management of the ten classes of activities already defined in the draft change law (and that do not require further rules). The reporting body to which the reports must be sent is the competent Commonwealth body, once again defined in the rules, or, in the absence of this body, the Australian Signals Directors, to the extent that the current ones investment plans concern activities falling within Expanded and be interested foreign foreign activities e enoizartsiger id itsiuger ied enoizacilppa' ehc eritarag rep etasseretni etnemaiznetop inoizazzinagro el rep ocitirc otmemom nu "A otseuQ .inretni iraffa ilged ortsnim lad otitseg otavresir ortsgir nu a ollortnoc id e azneulfni id .evitarepo inoizamrofni elled enoizacinumoc id ogilbbol' erifresart rep emron iroiretlu erirassecen idniuoq onoS .anailartsua acimonoe Ativitta'lled etrap atsav anu odnaruttae etnemaiznetop , Ativitta id issalc 22 onorop ehc irottes icidnu a jltrop e sag , Aticirrtelle .auccaq Ativitta id issalc orttauq ad eggel alled enoizacilppa' ednetse eggel al .enoizacilppa id otibma'lled enoisnetsE .ehciticr erurttsarfni elled tessa nu assereetni ehc azzerucisrebic id ovitacifingis etnedicni nu id osac ni erottes led issenno tessa ilg e inoizarepo el rep ehcna am .ehciticr erurttsarfni elled tessa issets ilg rep olso non ilibinopsid onos iretop itseuQ .otnemitsevni' rep enoizazzirota ataugeda'nu erenetto rep draoB weiv'eR tnm'tsevnI ngieroF la jiretse itnemitsevni id aretarn ni iggel elled isnes ia elibaciferev etnemaiznetop ais otnemitsevni' arolauq airatmolov o airotagilbbol' acitilon al atseilc'ir Aras es eratulav onnarvod irotitsevni ilg .eggel alled erogiv ni atartne'l opod ocoo etidortni eresse onassop arpos iuc id etsoporp eligos el ehc isrednetta elovenogiar otinatrep 'A de etasseretni Atitne el eratusnoc id ortsnim la onognoipi non emron el .icitiere ilarurttsarfni ivitta ilg rep eligos elled enoizangised alled mif ia .enoizalanges amirp allad ero 84 ortne atitres enoizaler eroiredu'nu .etnemlaro eneiva 'Ai' es .e otneve'lled azsesonoc a onognev iuc ni otmemom lad ero 27 ortne italanges eresse onoved azzerucisrebic id itnedicni ir'IA . 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By expanding the number of critical sectors and assets, the Bill consequently expands the scope of national security businesses to include new responsible entities and direct interest holders across a wide range of different industries. Cybersecurity reporting requirements The Bill will include two new cybersecurity incident reporting obligations where a cybersecurity incident affects or has affected a critical infrastructure asset. The powers, contained in Part 3A of the amended Act, have been hotly debated by industry and are subject to some oversight by the Parliamentary Joint Committee on Intelligence and Security, but such oversight is limited to the filing of a report. On 22 November 2021, the Security Legislation Amendment (Critical Infrastructure) Bill 2021 (Bill) passed both houses of the federal parliament of Australia and will come into force after receiving assent, likely before the end of 2021. Foreign Investment One of the lesser known impacts of the expansion of the definition of critical infrastructure assets is the consequential effect on the definition of eAAAnational security businessesAAA in theA Foreign Acquisitions and Takeovers Act Regulations 2015. consider whether any mixed-use systems may benefit from segregation. This legislation amends theA Security of Critical Infrastructure Act 2018A A(Cth) In four significant ways. Upcoming steps once in force, many of the aforementioned changes require that the relevant parts of the legislation are A e a .- A "switched on" using the minister's production powers. It is important that organizations include the application of law and of the benefits of submitting subscriptions. An event is fundamental where it has a "significant impact" defined as whether it is where an asset used in relation to the supply of essential goods or services is materially interrupted, which affects its availability , or back as the rules can define. Changes to registry reporting obligations for new inclusion activities and advanced cybers' security obligations require both rules to be implemented to turn on the obligations and this process will probably begin immediately after the law comes into force. An additional dimension is that many of the new activities of activities require further definition through the creation of specific rules of the sector by the Minister for Internal Affairs that define the operational thresholds to classify the resources of critical infrastructure. Other events are those who have a A e a .- A "General Cath" on the critical infrastructure resource, which means that availability, integrity, reliability or activity confidentiality have been affected. It remains to be seen when And how are these powers be used, but companies operating in the sectors concerned will have to determine how to prepare for this request, if it occurs. A national security business is defined to include responsible bodies and direct interest holders as defined in act. There is little in the event of appeal for private entities to challenge such directions and little to any capacity to request compensation for any .ihgilbbO .ihgilbbO .itaznava enoizalanges id ihgilbbO ilg erafsidoss id odary ni onos acitamrofni azzerucis id itnedicni id enoizalanges al e notalacese' rep issocrep e ehcitiop eut el eritnarG .etnentrep enoizerid anu id ottepsir lad otasuc eresse 'Aup ehc

The Commissioner submitted his final report to the Governor-General on 1 February 2019. The final report was tabled in the Australian Parliament on 4 February 2019. More information can be found on the Royal Commission into Misconduct in the Banking, Superannuation and Financial Services Industry website. The Australian Recording Industry Association (ARIA) is a trade group representing the Australian recording industry which was established in the 1970s by six major record companies, EMI, Festival, CBS, RCA, WEA and Universal replacing the Association of Australian Record Manufacturers (AARM) which was formed in 1956. It oversees the collection, administration ... The Australian Civil Space Strategy outlines the Government's plan to transform and grow our space industry over 10 years. We envision an industry that lifts the broader economy, inspires and improves the lives of Australians. Report an issue with packaging or storage of a medicine; ... Therapeutic Goods Advertising Code: Comparing the 2018 and 2021 Codes; Prescription medicines. ... We've just released a trial (beta) version of a new tool to search the Australian Register of Therapeutic Goods (ARTG). The resources sector delivers economic wealth, jobs, high wages, investment and tax revenues to Australians. The sector's contribution has exploded since the most recent mining boom kicked off in the mid 2000s (Figure 1). Together with mining services, the resources sector makes up over 8 per cent of Australia's economy4 and its economic impact is even higher on other measures: 21.01.2022 - This page provides high-level information on the Sport, Fitness and Recreation Activities industry. The Sport, Fitness and Recreation landscape is complex, and comprises of four main industry sectors: Aquatic and Community Recreation Fitness Outdoor Recreation Sport. The Sport, Fitness and Recreation sector is extremely popular with Australian consumers and ... The AISC National Industry Insights Report is a collection of skills, training, employment and labour market information and analysis, by industry sector. It also includes a National Skills Overview, which examines cross-industry insights. 05.03.2020 - Industry-based approaches. While the 2018 National Survey showed that workers across all industries and sectors experience sexual harassment, ... Marian Baird et al. Women and the Future of Work (Report 1 of the Australian Women's Working Futures Project, 2018) 92. 28.05.2021 - Australian Industry estimates report on the performance of selected industries compiled from the annual Economic Activity Survey (EAS), which excludes most of the General government sector (except for Subdivision 28 Water supply, sewerage and drainage services) and entities classified to Division K Financial and insurance services.

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