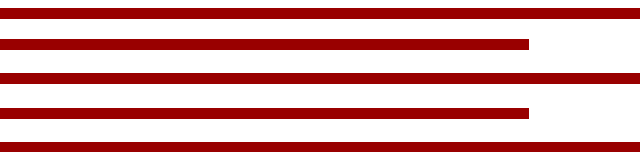


شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



## GCC DAILY MARKET WRAP

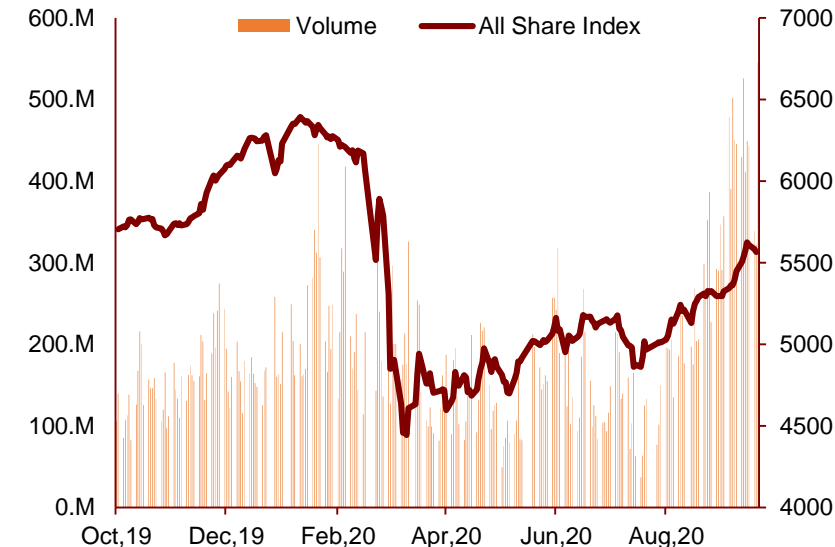
Tuesday, September 29, 2020



### Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>		%	%	%	%	%			
Kuwait All Share Index	5,445.20	-2.18	-2.92	2.85	6.13	-13.33	32.29 KWD	1.91	18.69
Kuwait Permier Index	6,020.84	-2.19	-3.23	2.84	7.38	-13.69	23.75 KWD	1.99	20.56
Kuwait Main Index	4,303.51	-2.15	-2.00	2.84	2.71	-12.36	8.54 KWD	1.68	13.49
NIC 50	6,667.60	-2.31	-0.07	2.95	7.77	-10.60	27.54 KWD	1.48	14.96
<b>Kuwait Sector</b>									
Banking	1,271.50	-2.15	-3.32	3.15	9.60	-14.24	19.28 KWD	2.16	20.02
Telecom	1,051.30	-1.22	-1.68	-1.82	1.45	-5.86	3.26 KWD	1.90	12.93
Industrials	797.79	-3.13	-3.21	4.16	0.19	-13.99	2.94 KWD	1.33	21.44
Financial services	906.29	-2.87	-3.51	3.53	4.42	-16.20	2.35 KWD	0.94	6.92
Real estate	944.49	-2.74	-2.89	8.12	5.74	-10.78	2.08 KWD	1.13	21.08
Basic materials	777.26	-1.98	-1.67	-0.43	-4.93	-14.41	0.71 KWD	1.23	19.09
Health care	820.13	0.00	0.00	-1.09	-0.11	-7.28	0.41 KWD	6.22	51.97
Consumer services	740.74	-1.51	0.64	3.38	-4.76	-30.92	0.39 KWD	1.97	13.09
Insurance	1,048.12	-1.31	2.98	8.26	9.71	9.88	0.39 KWD	0.95	8.44
Consumer goods	766.52	0.22	-0.31	-3.63	4.10	20.30	0.23 KWD	1.57	28.10
Oil and Gas	1,136.82	-0.95	-0.84	3.69	4.18	-8.19	0.24 KWD	1.67	10.74
Technology	512.16	-2.36	-4.86	3.08	3.53	-0.56	0.01 KWD	0.59	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>		%	%	%	%	%			
Saudi (TASI)	8,284.34	-0.60	0.58	4.33	14.68	-1.25	9,267 SAR	6.15	27.20
Qatar (QE Index)	9,910.72	0.27	1.25	0.67	10.14	-4.94	528 QAR	1.69	98.58
Dubai (DFMGI)	2,252.91	-0.38	0.03	0.34	9.09	-18.52	244 AED	20.98	10.74
Abu Dhabi (ADI)	4,494.75	0.06	0.63	-0.54	4.88	-11.45	669 AED	4.59	15.69
Bahrain (BAX)	1,430.84	-1.26	-1.35	3.62	11.99	-11.14	16 BHD	1.96	13.08
MUSCAT SE INDEX	3,614.64	-0.19	-0.33	-4.16	2.81	-9.20	4 OMR	0.75	10.87
<b>Developed Markets</b>									
MSCI World Index	2,366.41	1.70	1.70	-3.63	7.48	0.34			
U.S. (S&P 500)	3,351.60	1.61	1.61	-4.25	8.11	3.74			
U.K. (FTSE 100)	5,891.05	-0.62	0.83	-1.22	-4.52	-21.90			
Japan (Topix)	1,658.10	-0.23	1.46	2.47	6.37	-3.67			
<b>Emerging Markets</b>									
MSCI EM Index	1,069.88	1.02	1.02	-2.87	7.51	-4.02			
China (SSE Composite)	3,224.36	0.21	0.15	-5.05	8.03	5.71			
India (Sensex)	37,973.22	-0.02	1.63	-1.63	8.82	-7.89			



### What Move the GCC markets ,

#### Oil Prices

Oil prices fell on Tuesday, paring gains from the previous session, as persistent demand concerns due to the coronavirus pandemic outweighed hopes for a new U.S. stimulus package.

The International Energy Agency (IEA) on Tuesday trimmed its 2020 outlook by 200,000 barrels per day (bpd) to 91.7 million bpd, citing caution about the pace of economic recovery. **The more-active Brent crude futures for December fell 19 cents, or 0.4%, to \$42.68 a barrel.**

#### Kuwait Market

The market are closed today down by -2.18%, uncertainty elevated , with fear of the second wave Covid19 More than 1 million people have died of Covid-19 as of Tuesday, with fatalities and infections surging in several countries.

#### Saudi Market

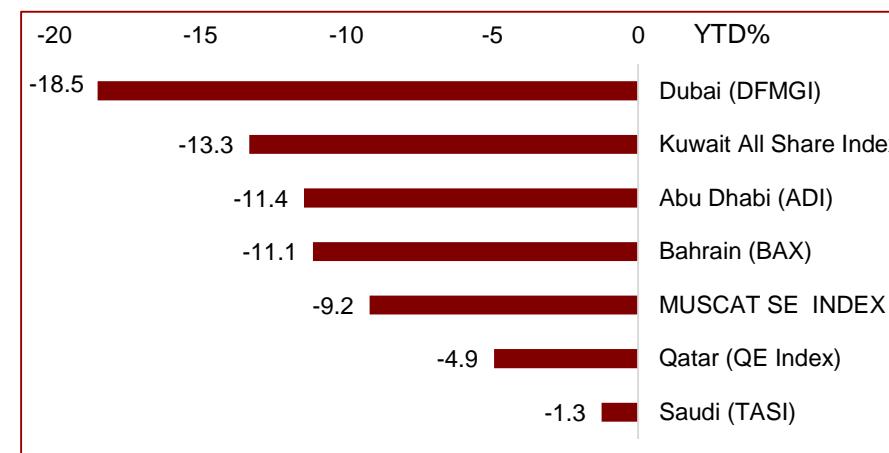
The Market closed today down by -0.6% , linked to the economic recovery over the globe and re-opening the global economy and oil prices over \$41 a barrel.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	0.870	-1.92	-2.68	1.16	5.97	-14.63	6.07 KWD	1.71	21.30
KFH	0.661	-2.36	-4.62	5.59	8.01	-10.35	5.19 KWD	2.76	25.98
Zain	0.574	-1.37	-1.88	-2.71	3.42	-4.33	2.52 KWD	2.05	12.38
BOUBYAN BANK	0.595	-0.50	-1.49	2.94	11.84	-2.54	1.81 KWD	3.17	36.02
Agility	0.657	-3.10	-3.10	5.29	2.94	-7.63	1.37 KWD	1.17	20.37
<b>Saudi Arabia</b>									
ARAMCO	36.20	-0.96	-1.36	1.83	11.38	2.70	7,310.00 SAR	7.12	30.16
SABIC	88.60	-0.34	-0.23	0.68	0.57	-5.64	266.70 SAR	1.63	0.00
STC	101.00	-0.98	1.00	5.21	2.02	-0.79	204.00 SAR	3.24	18.72
AL-RAJHI BANK	66.10	-0.60	-1.05	1.85	16.78	1.07	166.25 SAR	3.20	17.02
NCB	37.25	-0.53	-0.13	0.13	0.00	-24.37	112.35 SAR	1.53	10.46
<b>United Arab Emirates</b>									
ETISALAT.AD	16.54	0.00	-0.36	-0.12	0.24	1.10	143.84 AED	3.17	16.32
FAB.AD	11.18	0.36	0.90	-2.27	-0.36	-26.12	121.65 AED	1.25	11.61
EMIRATES NBD	10.30	-1.90	-1.44	-4.63	16.25	-20.77	66.32 AED	0.81	5.83
DB ISLAMIC BK	4.32	0.23	1.17	5.37	13.09	-21.60	31.21 AED	0.85	7.54
EMAAR PROPERT	2.81	-0.71	-1.40	-2.43	2.93	-30.10	20.26 AED	0.36	3.98
<b>Qatar</b>									
QNB	18.00	1.69	3.86	0.11	3.62	-12.48	163.50 QAR	1.80	12.70
INDUSTRIES QAT	9.95	0.10	-0.10	0.91	29.29	-3.21	60.14 QAR	1.86	37.58
QA ISLAMIC BK	16.06	0.75	0.69	0.38	1.97	4.76	37.67 QAR	1.81	13.21
MASRAF AL RAYA	4.12	0.00	0.78	-1.15	7.91	4.09	30.90 QAR	2.32	14.15
MESAEED PETRO	2.10	0.33	1.40	-1.08	3.81	-16.45	26.26 QAR	1.71	25.71
<b>OMAN</b>									
BANK MUSCAT	0.358	-0.55	-1.09	-9.05	7.74	-12.42	1.18 OMR	0.61	7.43
OMANTEL	0.632	0.00	0.64	0.64	-1.25	2.60	0.47 OMR	0.89	6.92
BANK DHOFAR	0.105	0.00	0.00	-5.41	0.00	-14.63	0.31 QAR	0.46	20.59
NAT BANK OF OMAN	0.165	1.80	0.00	-4.49	-2.30	-7.61	0.27 QAR	0.51	7.02
OMINVEST	0.330	0.00	0.00	-0.60	-2.35	0.61	0.27 QAR	1.07	6.31



### Leading Sector Performance

The market are down today by -2.18 % The leading sector bottom performance indices today are Industrials -3.13 % Financial services -2.87 % Real estate -2.74 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 20.3 % while the bottom sector performance is Consumer services by -30.92 %

Telecommunication sector are down today by -1.22 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by +7.47 %.

### KSA

Saudi Armco are have negative performance today by -0.96 %, SABIC have negative performance today by -0.34 %

STC are have negative performance today by -0.98 %, Al Rajhi Bank have negative performance today by -0.6 %

### UAE

ETISALAT AD are flat , still outperform the market performance in year to date basis and act defensively with COVID19

### Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
9-Sep-20	16.68%	11.69%	0.07%	0.32%	0.31%	3.65%	3.54%	7.72%	3.46%	2.94%
16-Sep-20	16.75%	11.76%	0.07%	0.31%	0.30%	3.66%	3.54%	7.76%	3.50%	2.94%

### End of Report

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