



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

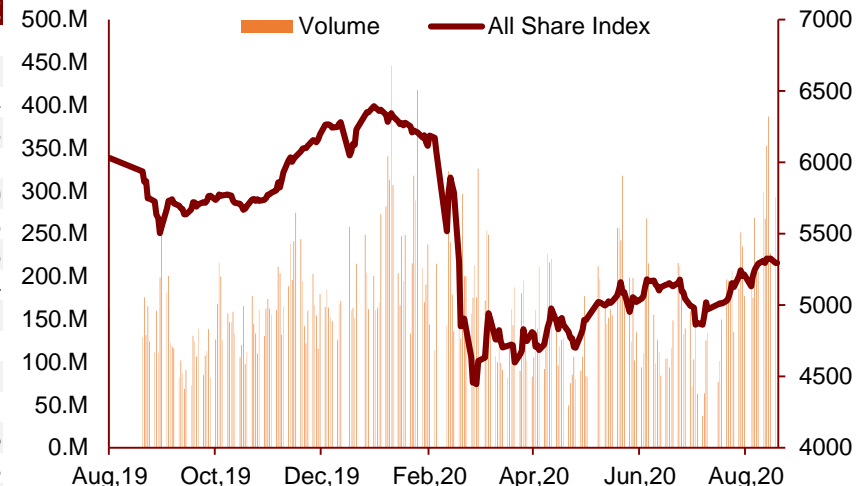
Monday, September 7, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,294.71	0.00	-0.59	0.01	3.20	-15.72	30.70 KWD	1.76	18.11
Kuwait Permier Index	5,807.89	-0.13	-0.98	-0.80	3.58	-16.74	22.44 KWD	1.88	19.44
Kuwait Main Index	4,281.94	0.38	0.51	2.32	2.19	-12.80	8.26 KWD	1.45	14.48
Kuwait Sector									
Banking	1,226.59	-0.09	-0.82	-0.49	5.73	-17.27	18.20 KWD	1.95	19.00
Telecom	1,048.13	0.15	-0.55	-2.11	1.15	-6.14	3.21 KWD	1.88	12.66
Industrials	778.32	0.43	-0.02	1.62	-2.25	-16.08	2.78 KWD	1.27	20.76
Financial services	917.21	0.50	0.51	4.78	5.68	-15.19	2.32 KWD	0.94	7.64
Real estate	883.54	0.06	-0.18	1.14	-1.09	-16.54	1.90 KWD	0.99	22.72
Basic materials	773.96	-0.07	-0.42	-0.85	-5.33	-14.77	0.69 KWD	1.15	18.79
Health care	829.21	0.00	0.00	0.00	1.00	-6.26	0.41 KWD	6.19	52.21
Consumer services	715.78	-0.21	-0.18	-0.10	-7.97	-33.25	0.37 KWD	1.86	12.42
Insurance	967.45	-0.37	-1.93	-0.07	1.27	1.42	0.36 KWD	0.84	7.75
Consumer goods	775.05	-2.30	-3.50	-2.56	5.26	21.64	0.24 KWD	1.60	29.23
Oil and Gas	1,088.84	0.61	0.75	-0.69	-0.22	-12.06	0.23 KWD	1.48	9.83
Technology	483.79	-9.52	-2.63	-2.63	-2.21	-6.07	0.01 KWD	0.54	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	8,050.14	0.32	0.06	1.38	11.43	-4.04	9,057 SAR	6.03	26.71
Qatar (QE Index)	9,725.28	0.02	-1.08	-1.17	8.13	-6.67	515 QAR	1.68	71.19
Dubai (DFMGI)	2,271.29	0.56	-0.50	1.16	9.97	-17.85	244 AED	28.00	10.64
Abu Dhabi (ADI)	4,507.95	-0.33	-0.97	-0.25	5.18	-11.19	671 AED	4.41	14.90
Bahrain (BAX)	1,404.83	0.15	-0.38	1.73	9.96	-12.75	15 BHD	1.51	12.82
MUSCAT SE INDEX	3,706.36	-0.01	-1.06	-1.74	5.41	-6.90	4 OMR	0.76	11.17
Developed Markets									
MSCI World Index	2,399.60	-1.08	0.00	-2.28	8.98	1.74			
U.S. (S&P 500)	3,426.96	-0.81	-2.31	-2.10	10.54	6.07			
U.K. (FTSE 100)	5,919.65	2.08	2.08	-0.74	-4.05	-21.52			
Japan (Topix)	1,609.74	-0.42	-0.42	-0.52	3.27	-6.48			
Emerging Markets									
MSCI EM Index	1,099.50	-0.84	0.00	-0.18	10.49	-1.36			
China (SSE Composite)	3,292.59	-1.87	-1.87	-3.04	10.32	7.95			
India (Sensex)	38,417.23	0.16	0.16	-0.55	10.03	-6.88			



What Move the GCC markets , Oil Prices

Oil prices dropped more than 1% on Monday after earlier hitting their lowest since July as Saudi Arabia made the deepest monthly price cuts for supply to Asia in five months while optimism about demand recovery cooled amid the coronavirus pandemic.

Prices were pressured by extended declines in the U.S. equities market and by a report showing U.S. job growth slowed further in August as financial assistance from the government ran out. **Brent crude was at \$42.21 a barrel, down 45 cents or 1.1%**

Kuwait Market

The market are closed today flat, concern around a slow of local economic recovery from the COVID-19 pandemic added to worries about weak oil demand. resurgence of the number of cases and the fear from second wave ,

Saudi Market

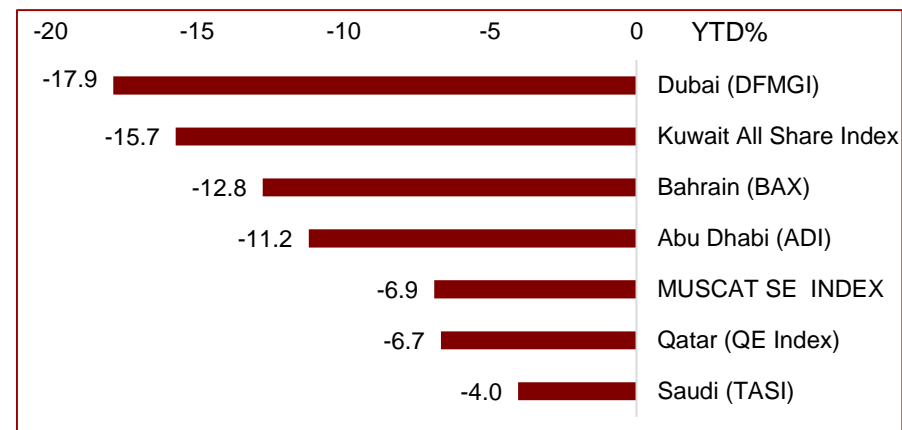
The Market closed up today by 0.32% , linked to the economic recovery over the globe and re-opening the global economy and oil prices over \$42 a barrel

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	0.853	0.12	-1.27	-0.81	3.90	-16.29	5.84 KWD	1.65	20.46
KFH	0.623	0.00	-0.80	-0.48	1.80	-15.50	4.78 KWD	2.54	23.91
Zain	0.572	0.18	-1.04	-3.05	3.06	-4.67	2.48 KWD	2.02	12.15
BOUBYAN BANK	0.583	0.00	-0.17	0.87	9.59	-4.50	1.77 KWD	3.09	35.12
Agility	0.622	-0.16	-0.64	-0.32	-2.55	-12.55	1.26 KWD	1.07	18.71
Saudi Arabia									
ARAMCO	35.75	-0.28	-0.69	0.56	10.00	1.42	7,170.00 SAR	6.99	29.67
SABIC	88.00	-0.11	-2.00	0.00	-0.11	-6.28	264.30 SAR	1.62	0.00
STC	97.30	-0.21	-0.41	1.35	-1.72	-4.42	195.00 SAR	3.10	18.26
AL-RAJHI BANK	66.10	0.15	0.15	1.85	16.78	1.07	165.00 SAR	3.18	16.84
NCB	37.00	0.14	-0.27	-0.54	-0.67	-24.87	110.85 SAR	1.51	10.40
United Arab Emirates									
ETISALAT.AD	16.52	-0.48	-0.84	0.12	0.48	1.34	143.67 AED	3.17	16.38
FAB.AD	11.40	-0.52	-1.21	-0.35	1.60	-24.67	124.49 AED	1.27	11.95
EMIRATES NBD	10.80	0.93	0.00	0.00	21.90	-16.92	68.22 AED	0.84	5.95
DB ISLAMIC BK	4.29	0.94	0.23	4.63	12.30	-22.14	31.06 AED	0.85	7.44
EMAAR PROPERT	2.93	0.00	-2.01	1.74	7.33	-27.11	20.98 AED	0.38	4.12
Qatar									
QNB	17.80	-0.22	-0.89	-0.89	2.59	-13.36	164.41 QAR	1.81	12.80
INDUSTRIES QAT	10.00	1.25	-0.99	1.42	29.94	-2.72	60.50 QAR	1.87	37.34
QA ISLAMIC BK	15.91	0.13	-0.37	-0.37	1.21	3.98	37.59 QAR	1.81	13.17
MASRAF AL RAYA	4.10	-0.51	-1.80	-1.63	7.38	3.59	30.74 QAR	2.31	14.14
MESAIEED PETRO	2.11	-0.66	-1.45	-0.52	4.41	-15.98	26.45 QAR	1.72	26.06
OMAN									
BANK MUSCAT	0.394	1.03	0.51	-1.51	16.67	-5.16	1.27 OMR	0.65	7.92
OMANTEL	0.620	0.00	-0.64	-1.27	-3.12	0.65	0.47 OMR	0.88	6.79
BANK DHOFAR	0.111	0.00	-0.89	0.00	5.71	-9.76	0.33 QAR	0.49	21.76
NAT BANK OF OMAN	0.179	0.00	0.56	0.56	2.87	-2.72	0.29 QAR	0.55	7.52
OMINVEST	0.332	0.61	0.61	-0.60	-2.35	0.61	0.27 QAR	1.07	6.27



Leading Sector Performance

Kuwait

The market are flat today 0 % The leading sector best performance indices today are Oil and Gas 0.61 % Financial services 0.5 % Industrials 0.43 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 21.64 % while the bottom sector performance is Consumer services by -33.25 %

Telecommunication sector are up today by + 0.15 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 9.58 %

KSA

Saudi Armco are have negative performance today by -0.28 %, SABIC have negative performance today by -0.11 %

STC are have negative performance today by -0.21 %, Al Rajhi Bank have positive performance today by + 0.15 %

UAE

ETISALAT AD are down today by -0.84%, still outperform the market performance and act defensively with COVID19

Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
26-Aug-20	16.56%	11.44%	0.07%	0.34%	0.33%	3.57%	3.36%	7.52%	3.42%	2.93%
2-Sep-20	16.63%	11.63%	0.07%	0.33%	0.32%	3.62%	3.45%	7.66%	3.40%	2.93%

End of Report

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