



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

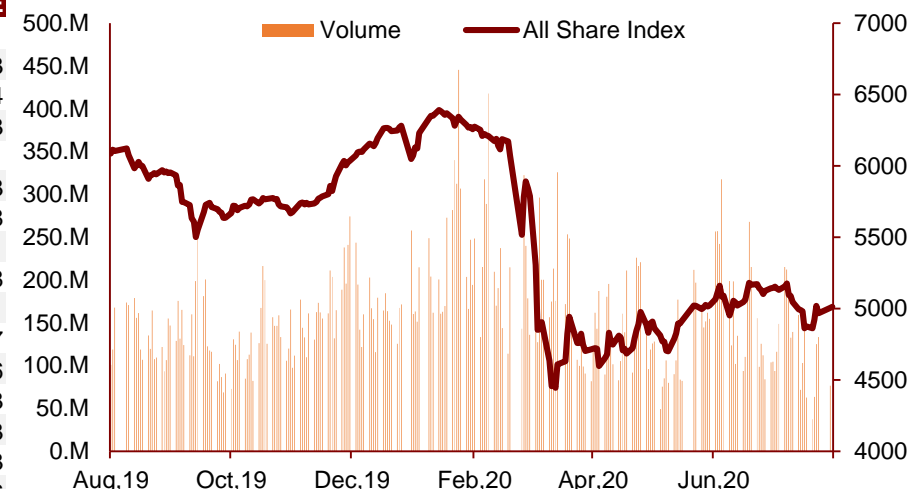
Wednesday, August 5, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,012.18	0.16	0.88	0.88	-2.31	-20.22	28.95 KWD	1.54	16.23
Kuwait Permier Index	5,490.97	0.35	1.40	1.40	-2.07	-21.29	21.06 KWD	1.65	16.64
Kuwait Main Index	4,066.20	-0.36	-0.48	-0.48	-2.96	-17.20	7.89 KWD	1.26	15.13
Kuwait Sector									
Banking	1,138.39	0.22	1.29	1.29	-1.88	-23.22	16.81 KWD	1.62	17.33
Telecom	1,017.92	0.16	0.77	0.77	-1.77	-8.84	3.12 KWD	1.82	12.38
Industrials	776.94	0.08	0.43	0.43	-2.43	-16.23	2.78 KWD	1.28	16.91
Financial services	830.06	-0.42	-0.74	-0.74	-4.36	-23.25	2.13 KWD	0.81	11.58
Real estate	858.23	1.08	1.46	1.46	-3.92	-18.93	1.83 KWD	0.90	12.01
Basic materials	774.64	1.32	1.60	1.60	-5.25	-14.70	0.68 KWD	1.11	16.47
Health care	839.19	0.00	0.00	0.00	2.21	-5.13	0.42 KWD	6.29	47.76
Consumer services	743.47	-0.27	-1.56	-1.56	-4.41	-30.66	0.39 KWD	1.41	8.93
Insurance	938.94	-1.79	0.08	0.08	-1.72	-1.57	0.35 KWD	0.82	7.83
Consumer goods	722.37	-0.71	-0.15	-0.15	-1.90	13.37	0.22 KWD	1.55	31.43
Oil and Gas	1,041.60	-4.66	-4.90	-4.90	-4.54	-15.88	0.23 KWD	1.63	9.16
Technology	465.60	0.00	0.00	0.00	-5.88	-9.60	0.01 KWD	0.50	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	7,470.26	0.15	0.15	0.15	3.41	-10.95	8,380 SAR	5.34	28.47
Qatar (QE Index)	9,321.96	-0.49	0.05	0.05	4.16	-10.09	497 QAR	1.63	33.38
Dubai (DFMGI)	2,079.39	0.03	1.40	1.40	0.68	-24.79	224 AED	0.97	8.69
Abu Dhabi (ADI)	4,305.92	-0.28	0.03	0.03	0.47	-15.17	643 AED	4.39	18.40
Bahrain (BAX)	1,292.44	0.15	0.15	0.15	1.16	-19.73	14 BHD	1.02	16.53
MUSCAT SE INDEX	3,568.10	0.28	0.12	1.48	1.48	-10.38	4 OMR	0.73	9.70
Developed Markets									
MSCI World Index	2,336.82	0.55	1.38	1.38	6.13	-0.92			
U.S. (S&P 500)	3,306.51	0.36	1.08	1.08	6.65	2.34			
U.K. (FTSE 100)	6,097.04	1.01	3.38	3.38	-1.18	-19.16			
Japan (Topix)	1,554.71	-0.04	3.92	3.92	-0.26	-9.68			
Emerging Markets									
MSCI EM Index	1,089.58	1.09	0.99	0.99	9.49	-2.25			
China (SSE Composite)	3,377.56	0.17	2.04	2.04	13.16	10.74			
India (Sensex)	37,663.33	-0.07	0.28	0.28	8.01	-8.59			



What Move the GCC markets , Oil Prices

Oil prices rose to their highest since early March on Wednesday after data showed a big drop in U.S. crude inventories, although concerns that mounting coronavirus infections will lead to reduced fuel demand capped gains.

Inventories of crude oil in the U.S. dropped by 6.8 million barrels last week to 531 million barrels, data from industry group the American Petroleum Institute showed on Tuesday. **Brent crude was up \$1.43, or 3.22%, at \$45.86 a barrel.**

Kuwait Market

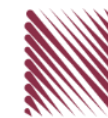
The market are closed today up by +0.16%, the hope of re- opening the local economy and the effect of demand recovery and production cut effect on the oil prices also the positive effect on inflows from MSCI in Nov 2020 . **Value traded over 25.3 Million KD.**

Saudi Market

The Market closed up last week by +0.15% , linked to the effect of the re-opening the local economy also the oil performance above 45\$ with the production cuts.

DAILY MARKETS WRAP,

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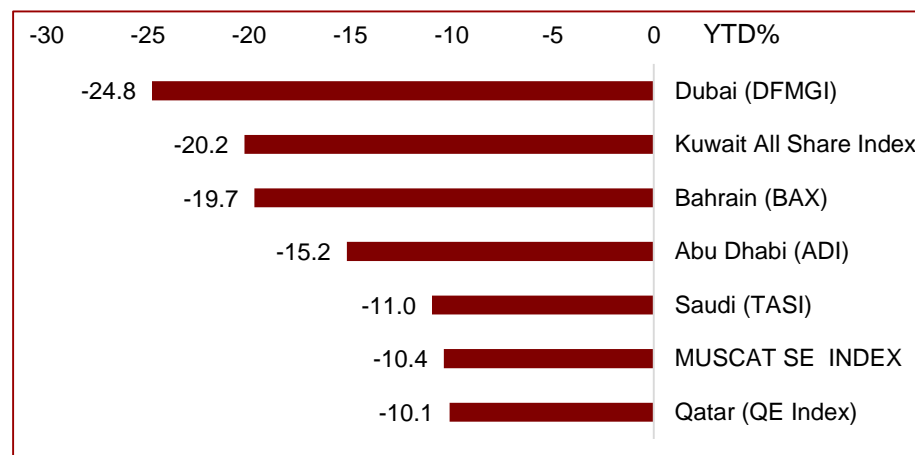
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.796	-0.25	0.89	0.89	-3.05	-21.89	5.47 KWD	1.54	18.94
KFH	0.588	0.68	1.73	1.73	-3.92	-20.25	4.48 KWD	1.96	17.78
Zain	0.555	0.18	0.91	0.91	0.00	-7.50	2.40 KWD	1.95	11.70
BOUBYAN BANK	0.538	0.56	1.32	1.32	1.13	-11.87	1.62 KWD	2.84	31.99
Agility	0.645	-0.15	0.78	0.78	1.06	-9.32	1.31 KWD	1.12	14.56
Saudi Arabia									
ARAMCO	33.05	0.15	0.15	0.15	1.69	-6.24	6,600.00 SAR	6.17	21.05
SABIC	88.00	-1.01	-1.01	-1.01	-0.11	-6.28	266.74 SAR	1.60	217.86
STC	96.00	-1.23	-1.23	-1.23	-3.03	-5.70	194.43 SAR	3.09	18.14
AL-RAJHI BANK	58.90	0.00	0.00	0.00	4.06	-9.94	147.25 SAR	2.97	15.01
NCB	36.35	0.14	0.14	0.14	-2.42	-26.19	108.91 SAR	1.69	9.37
United Arab Emirates									
ETISALAT.AD	16.44	-0.60	-0.60	-0.60	0.24	1.10	143.84 AED	3.17	16.42
FAB.AD	10.96	-0.72	0.37	0.37	-2.49	-27.70	120.56 AED	1.23	11.47
EMIRATES NBD	9.20	0.88	4.07	4.07	3.84	-29.23	57.61 AED	0.71	5.02
DB ISLAMIC BK	3.78	-0.26	0.27	0.27	-1.05	-31.40	27.44 AED	0.75	6.67
EMAAR PROPERT	2.63	0.38	2.33	2.33	-3.66	-34.58	18.76 AED	0.35	2.96
Qatar									
QNB	18.00	0.00	0.00	0.00	3.51	-12.58	166.26 QAR	1.83	12.98
INDUSTRIES QAT	7.80	-0.26	0.51	0.51	2.13	-23.54	47.31 QAR	1.46	29.20
QA ISLAMIC BK	15.91	-1.18	-1.18	-1.18	1.02	3.78	38.04 QAR	1.83	13.33
MASRAF AL RAYA	3.91	-0.66	-0.66	-0.66	2.41	-1.21	29.54 QAR	2.22	13.42
MESAEIED PETRO	2.07	-0.72	-0.72	-0.72	2.48	-17.53	26.19 QAR	1.82	27.27
OMAN									
BANK MUSCAT	0.350	0.58	0.00	3.57	3.57	-15.81	1.13 OMR	0.58	6.58
OMANTEL	0.608	0.00	0.66	-4.37	-4.37	-0.65	0.46 OMR	0.87	5.91
BANK DHOFAR	0.100	1.00	1.00	-3.81	-3.81	-17.89	0.30 QAR	0.44	18.87
NAT BANK OF OMAN	0.169	0.00	0.00	-2.87	-2.87	-8.15	0.27 QAR	0.52	6.60
OMINVEST	0.344	0.00	0.58	1.18	1.18	4.24	0.28 QAR	0.89	8.69

Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
22-Jul-20	16.47%	11.62%	0.09%	0.38%	0.33%	3.56%	3.38%	7.60%	3.37%	2.92%
29-Jul-20	16.46%	11.41%	0.08%	0.36%	0.33%	3.57%	3.36%	7.58%	3.38%	2.91%

End of Report

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Leading Sector Performance

Kuwait

The market are up today by +0.16 % The leading sector best performance indices today are Basic materials 1.32 % Real estate 1.08 % Banking 0.22 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 13.37 % while the bottom sector performance is Consumer services by -30.66 %

Telecommunication sector are up today by +0.16 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by +11.38 %

KSA

Saudi Armco are have positive performance today by +0.15 %, SABIC have negative performance today by -1.01 %

STC are have negative performance today by -1.23 %, Al Rajhi Bank flat performance today 0 %

UAE

ETISALAT AD are down today by -0.6% , still outperform the market performance and act defensively with COVID19



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