



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

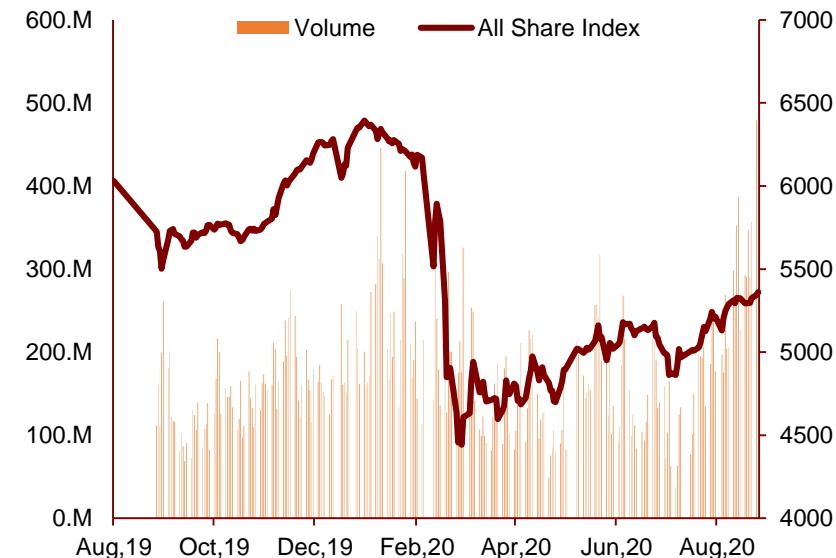
Monday, September 14, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,362.11	0.32	0.71	1.28	4.51	-14.65	31.10 KWD	1.78	18.15
Kuwait Permier Index	5,877.26	0.39	0.71	0.39	4.82	-15.75	22.71 KWD	1.91	19.55
Kuwait Main Index	4,345.85	0.12	0.70	3.85	3.72	-11.50	8.38 KWD	1.42	14.34
Kuwait Sector									
Banking	1,242.13	0.41	0.78	0.77	7.07	-16.22	18.44 KWD	1.96	19.16
Telecom	1,058.22	-0.21	0.46	-1.17	2.12	-5.24	3.24 KWD	1.89	12.86
Industrials	791.51	0.45	0.32	3.34	-0.60	-14.66	2.83 KWD	1.33	20.78
Financial services	919.34	-1.02	0.53	5.02	5.92	-14.99	2.32 KWD	0.92	7.14
Real estate	909.16	1.65	1.60	4.08	1.78	-14.12	1.96 KWD	1.00	22.12
Basic materials	763.56	0.09	-0.23	-2.18	-6.60	-15.92	0.68 KWD	1.14	18.55
Health care	829.21	0.00	0.00	0.00	1.00	-6.26	0.41 KWD	6.19	52.21
Consumer services	730.22	0.49	0.21	1.91	-6.11	-31.90	0.38 KWD	1.89	12.66
Insurance	998.90	0.01	1.11	3.18	4.56	4.72	0.37 KWD	0.87	7.95
Consumer goods	762.77	-0.32	-0.71	-4.10	3.59	19.71	0.23 KWD	1.57	28.14
Oil and Gas	1,133.61	-0.32	-0.22	3.39	3.89	-8.45	0.24 KWD	1.61	10.42
Technology	531.08	-2.01	4.29	6.88	7.35	3.11	0.01 KWD	0.59	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	8,256.07	0.64	1.49	3.97	14.29	-1.59	9,117 SAR	6.05	26.56
Qatar (QE Index)	9,872.86	-0.05	1.22	0.38	9.83	-5.20	529 QAR	1.70	94.18
Dubai (DFMGI)	2,282.38	0.35	0.52	1.65	10.51	-17.45	245 AED	26.14	10.67
Abu Dhabi (ADI)	4,515.11	0.11	-0.09	-0.09	5.35	-11.05	670 AED	4.46	15.02
Bahrain (BAX)	1,401.51	0.22	0.85	1.49	9.70	-12.96	15 BHD	1.45	12.79
MUSCAT SE INDEX	3,684.50	-0.20	-0.05	-2.32	4.79	-7.45	4 OMR	0.75	11.16
Developed Markets									
MSCI World Index	2,368.14	0.01	0.00	-3.56	7.56	0.41			
U.S. (S&P 500)	3,340.97	0.00	-2.51	-4.55	7.76	3.41			
U.K. (FTSE 100)	6,041.14	0.15	0.15	1.30	-2.08	-19.90			
Japan (Topix)	1,651.10	0.88	0.88	2.03	5.92	-4.08			
Emerging Markets									
MSCI EM Index	1,091.79	0.60	0.00	-0.88	9.72	-2.05			
China (SSE Composite)	3,278.81	0.57	0.57	-3.44	9.86	7.50			
India (Sensex)	38,756.63	-0.25	-0.44	0.14	10.79	-6.23			



What Move the GCC markets , Oil Prices

Oil prices slipped slightly on Monday amid concerns about a stalled global economic recovery and worries over renewed Libyan supply, but were supported by an impending storm which has disrupted U.S. oil production.

Infections are growing faster in India than anywhere else, and the health ministry reported another record daily jump of 96,551 new cases on Friday, taking the official total to 4.5 million. Brent crude was down 11 cents, or 0.2%, at \$39.72 a barrel .

Kuwait Market

The market are closed today up by +0.32% , after re-opening the local economy , oil performance , MSCI positive liquidity expectation , New IPO's Boursa Kuwait Co , the value traded over 56 million KD

Saudi Market

The Market closed today up by +0.64% , linked to the slow economic recovery over the globe and re-opening the global economy and oil prices over \$40 a barrel

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



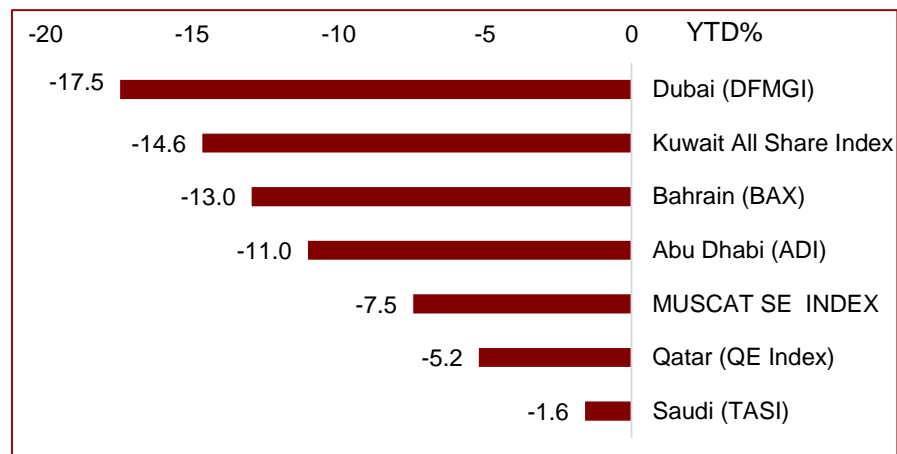
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.865	-0.12	0.70	0.58	5.36	-15.12	5.93 KWD	1.67	20.79
KFH	0.629	0.48	0.64	0.48	2.78	-14.69	4.83 KWD	2.56	24.02
Zain	0.577	-0.17	0.52	-2.20	3.96	-3.83	2.50 KWD	2.03	12.30
BOUBYAN BANK	0.592	0.51	-0.34	2.42	11.28	-3.03	1.79 KWD	3.14	35.48
Agility	0.629	0.64	0.32	0.80	-1.45	-11.57	1.28 KWD	1.08	18.77
Saudi Arabia									
ARAMCO	36.05	0.28	0.98	1.41	10.92	2.27	7,190.19 SAR	7.01	29.42
SABIC	88.10	0.23	0.00	0.11	0.00	-6.18	263.71 SAR	1.61	0.00
STC	99.20	0.10	0.00	3.33	0.20	-2.55	198.21 SAR	3.15	18.54
AL-RAJHI BANK	67.90	1.19	2.11	4.62	19.96	3.82	167.75 SAR	3.23	16.97
NCB	38.00	2.70	2.70	2.15	2.01	-22.84	111.00 SAR	1.51	10.37
United Arab Emirates									
ETISALAT.AD	16.52	-0.12	-0.36	-0.24	0.12	0.98	143.67 AED	3.17	16.32
FAB.AD	11.38	0.00	-0.35	-0.70	1.25	-24.93	124.27 AED	1.27	11.86
EMIRATES NBD	10.85	0.00	1.40	0.46	22.46	-16.54	68.54 AED	0.84	6.03
DB ISLAMIC BK	4.31	-0.46	-0.69	5.12	12.83	-21.78	31.21 AED	0.85	7.58
EMAAR PROPERT	2.91	0.69	0.00	1.04	6.59	-27.61	20.83 AED	0.37	4.06
Qatar									
QNB	17.65	-2.43	0.06	-1.50	1.96	-13.89	163.02 QAR	1.80	12.98
INDUSTRIES QAT	10.30	1.98	3.10	4.46	33.84	0.19	62.32 QAR	1.93	38.19
QA ISLAMIC BK	15.92	-0.19	-0.37	-0.37	1.21	3.98	37.62 QAR	1.81	13.22
MASRAF AL RAYA	4.15	-0.69	0.12	-0.36	8.77	4.92	31.13 QAR	2.34	14.35
MESAIEED PETRO	2.13	1.09	1.53	0.19	5.15	-15.38	26.70 QAR	1.73	25.85
OMAN									
BANK MUSCAT	0.380	-0.52	-1.55	-4.52	13.10	-8.06	1.24 OMR	0.64	7.84
OMANTEL	0.624	0.00	0.00	-0.64	-2.50	1.30	0.47 OMR	0.88	6.83
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	0.168	-0.58	0.00	-4.49	-2.30	-7.61	0.28 QAR	0.52	7.18
OMINVEST	0.332	0.00	3.11	-0.60	-2.35	0.61	0.27 QAR	1.07	6.31

Summary - Absolute change in Foreign Ownership

	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
2-Sep-20	16.63%	11.63%	0.07%	0.33%	0.32%	3.62%	3.45%	7.66%	3.40%	2.93%
9-Sep-20	16.68%	11.69%	0.07%	0.32%	0.31%	3.65%	3.54%	7.72%	3.46%	2.94%

End of Report

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Leading Sector Performance

Kuwait

The market are up today by + 0.32 % The leading sector best performance indices today are Real estate 1.65 % Consumer services 0.49 % Industrials 0.45 % respectively

from YTD performance perspective the best sector performance are Consumer goods by 19.71 % while the bottom sector performance is Consumer services by -31.9 %

Telecommunication sector are down today by -0.21 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 9.41 %

KSA

Saudi Armco are have positive performance today by + 0.28 %, SABIC have positive performance today by + 0.23 %

STC are have positive performance today by + 0.1 %, Al Rajhi Bank have positive performance today by + 1.19 %

UAE

ETISALAT AD are down today by -0.12%, still outperform the market performance and act defensively with COVID19



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