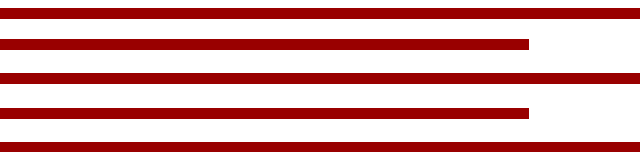


شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



## GCC DAILY MARKET WRAP

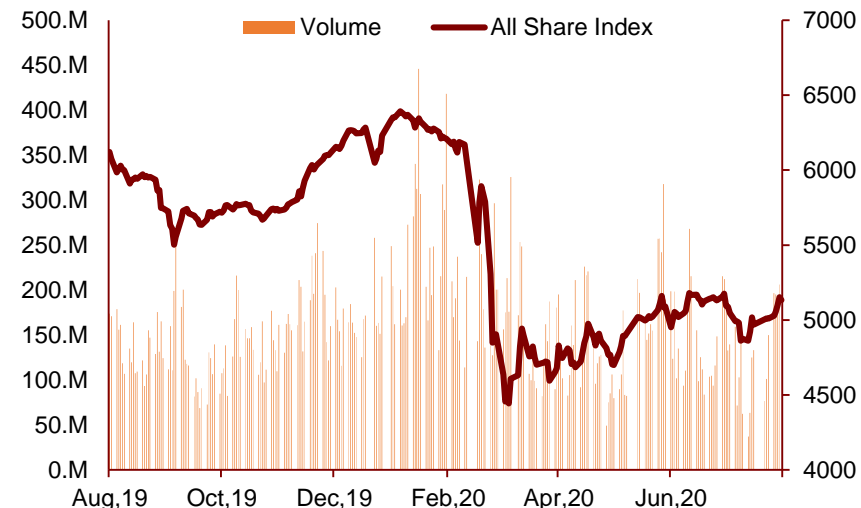
Thursday, August 13, 2020



### Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>		%	%	%	%	%			
Kuwait All Share Index	5,126.09	-0.51	2.32	3.18	-0.09	-18.41	29.90 KWD	1.68	17.91
Kuwait Permier Index	5,652.91	-0.53	3.08	4.39	0.82	-18.97	21.92 KWD	1.82	18.90
Kuwait Main Index	4,083.82	-0.46	0.27	-0.05	-2.54	-16.84	7.98 KWD	1.29	15.19
<b>Kuwait Sector</b>									
Banking	1,177.10	-0.61	3.39	4.73	1.46	-20.61	17.56 KWD	1.82	19.54
Telecom	1,045.71	0.22	2.81	3.52	0.91	-6.36	3.21 KWD	1.88	12.75
Industrials	768.19	-0.61	-0.64	-0.70	-3.52	-17.18	2.77 KWD	1.25	16.99
Financial services	821.92	-0.70	-0.69	-1.71	-5.30	-24.00	2.15 KWD	0.83	11.61
Real estate	865.98	-0.19	0.75	2.38	-3.05	-18.20	1.87 KWD	0.99	16.69
Basic materials	786.16	-0.45	2.49	3.11	-3.84	-13.43	0.70 KWD	1.13	16.92
Health care	839.19	0.00	0.00	0.00	2.21	-5.13	0.42 KWD	6.29	47.76
Consumer services	738.93	0.31	-0.72	-2.16	-4.99	-31.09	0.38 KWD	1.42	7.79
Insurance	951.70	-1.13	-1.16	1.44	-0.38	-0.23	0.35 KWD	0.83	8.07
Consumer goods	766.77	-1.86	5.45	5.99	4.13	20.34	0.24 KWD	1.67	33.96
Oil and Gas	1,075.57	-3.02	3.05	-1.80	-1.43	-13.13	0.23 KWD	1.69	10.53
Technology	447.41	0.00	-3.91	-3.91	-9.56	-13.14	0.01 KWD	0.48	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>		%	%	%	%	%			
Saudi (TASI)	7,704.25	0.77	2.72	3.29	6.65	-8.16	8,445 SAR	5.57	25.57
Qatar (QE Index)	9,602.49	0.52	1.76	2.23	6.43	-8.14	506 QAR	1.66	33.50
Dubai (DFMGI)	2,155.40	1.90	2.27	5.10	4.36	-22.04	228 AED	0.99	9.58
Abu Dhabi (ADI)	4,386.67	0.62	0.62	1.90	2.35	-13.58	654 AED	4.43	14.83
Bahrain (BAX)	1,311.30	-0.25	1.74	1.61	2.64	-18.56	14 BHD	1.09	15.71
MUSCAT SE INDEX	3,565.21	-0.05	-0.08	-0.08	1.40	-10.45	4 OMR	0.73	10.68
<b>Developed Markets</b>									
MSCI World Index	2,391.80	1.37	1.52	3.77	8.63	1.41			
U.S. (S&P 500)	3,380.35	1.40	0.87	3.34	9.03	4.63			
U.K. (FTSE 100)	6,215.25	-1.03	3.03	5.38	0.74	-17.60			
Japan (Topix)	1,624.15	1.16	5.00	8.56	4.19	-5.65			
<b>Emerging Markets</b>									
MSCI EM Index	1,093.98	0.25	0.43	1.40	9.94	-1.86			
China (SSE Composite)	3,320.73	0.04	-0.98	0.33	11.27	8.88			
India (Sensex)	38,310.49	-0.15	0.81	1.97	9.83	-7.04			



### What Move the GCC markets , Oil Prices

Crude oil prices slipped on Thursday after OPEC said it expected fuel demand to fall more than expected, although U.S. government data showing a fall in inventories suggested demand is returning despite the coronavirus pandemic.

OPEC said in a monthly report that world oil demand will fall by 9.06 million bpd this year, more than the 8.95 million bpd decline expected a month ago. **Brent crude was down 8 cents at \$45.35 a barre**

### Kuwait Market

The market are closed today down by -0.51%, after positive week closing by +2.3% 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 23.8 Million KD.**

### Saudi Market

The Market closed up today by +0.77% , linked to the effect of the re-opening the local economy also the oil performance above 45\$ with the production cuts.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



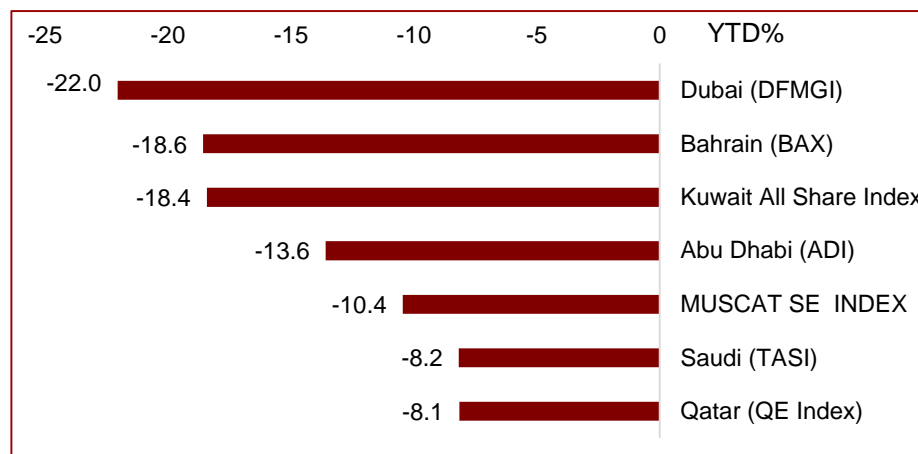
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	0.814	-0.61	2.91	3.17	-0.85	-20.12	5.62 KWD	1.58	19.66
KFH	0.614	-0.49	4.42	6.23	0.33	-16.72	4.75 KWD	2.51	23.68
Zain	0.574	0.35	3.61	4.36	3.42	-4.33	2.48 KWD	2.02	12.17
BOUBYAN BANK	0.557	-0.36	3.53	4.90	4.70	-8.76	1.70 KWD	2.96	33.67
Agility	0.641	-1.08	-0.47	0.16	0.43	-9.88	1.32 KWD	1.13	14.74
<b>Saudi Arabia</b>									
ARAMCO	33.50	1.06	1.67	1.52	3.08	-4.96	6,630.00 SAR	6.46	27.44
SABIC	88.80	0.68	1.14	-0.11	0.79	-5.43	264.60 SAR	1.58	0.00
STC	96.70	0.00	-0.31	-0.51	-2.32	-5.01	193.40 SAR	3.07	18.03
AL-RAJHI BANK	62.80	0.48	5.55	6.62	10.95	-3.98	156.25 SAR	3.01	15.79
NCB	37.10	0.27	1.09	2.20	-0.40	-24.67	111.00 SAR	1.51	10.34
<b>United Arab Emirates</b>									
ETISALAT.AD	16.62	0.61	-0.36	-0.12	0.73	1.59	143.67 AED	3.17	16.30
FAB.AD	11.08	0.91	-0.72	1.10	-1.78	-27.18	119.90 AED	1.23	11.45
EMIRATES NBD	9.75	2.63	4.28	10.29	10.05	-25.00	60.01 AED	0.74	5.28
DB ISLAMIC BK	3.89	1.04	1.30	3.18	1.83	-29.40	27.88 AED	0.76	6.74
EMAAR PROPERT	2.78	2.96	3.35	8.17	1.83	-30.85	19.33 AED	0.36	3.12
<b>Qatar</b>									
QNB	18.18	0.17	-0.83	0.17	3.68	-12.43	167.71 QAR	1.85	13.02
INDUSTRIES QAT	8.80	1.85	9.35	12.57	14.38	-14.37	52.29 QAR	1.62	32.67
QA ISLAMIC BK	16.13	0.19	-0.37	0.06	2.29	5.09	38.06 QAR	1.83	13.34
MASRAF AL RAYA	4.02	1.06	1.88	1.88	5.03	1.31	29.86 QAR	2.25	13.67
MESAIIEED PETRO	2.15	0.94	2.74	2.49	5.79	-14.86	26.77 QAR	1.85	27.66
<b>OMAN</b>									
BANK MUSCAT	0.354	0.00	2.29	2.29	6.55	-13.39	1.16 OMR	0.60	7.31
OMANTEL	0.612	-0.65	0.66	0.66	-4.37	-0.65	0.46 OMR	0.87	6.75
BANK DHOFAR	0.100	0.00	0.00	0.00	-4.76	-18.70	0.30 QAR	0.44	19.61
NAT BANK OF OMAN	0.169	0.00	0.00	0.00	-2.87	-8.15	0.27 QAR	0.52	7.10
OMINVEST	0.338	0.00	-1.74	-1.74	-0.59	2.42	0.27 QAR	0.88	8.54

### Summary - Absolute change in Foreign Ownership

	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
5-Aug-20	16.51%	11.46%	0.08%	0.36%	0.33%	3.57%	3.36%	7.58%	3.41%	2.92%
12-Aug-20	16.54%	11.44%	0.07%	0.35%	0.33%	3.57%	3.35%	7.52%	3.45%	2.92%

### End of Report

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### Leading Sector Performance

#### Kuwait

The market are down today by -0.51 % The leading sector bottom performance indices today are Oil and Gas -3.02 % Consumer goods -1.86 % Insurance -1.13 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 20.34 % while the bottom sector performance is Consumer services by -31.09 %

Telecommunication sector are up today by + 0.22 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 12.05 %

#### KSA

Saudi Armco are have negative performance today by -0.45 %, SABIC have positive performance today by + 0.34 %

STC are have positive performance today by + 0.21 %, Al Rajhi Bank have positive performance today by + 0.97 %

#### UAE

ETISALAT AD are up today by 0.61% , still outperform the market performance and act defensively with COVID19



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NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | [www.nic.com.kw](http://www.nic.com.kw)