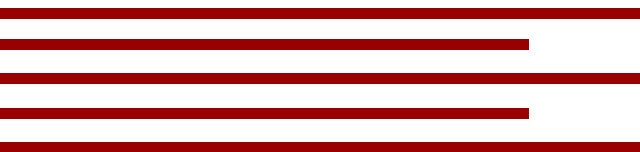
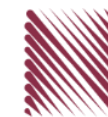


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

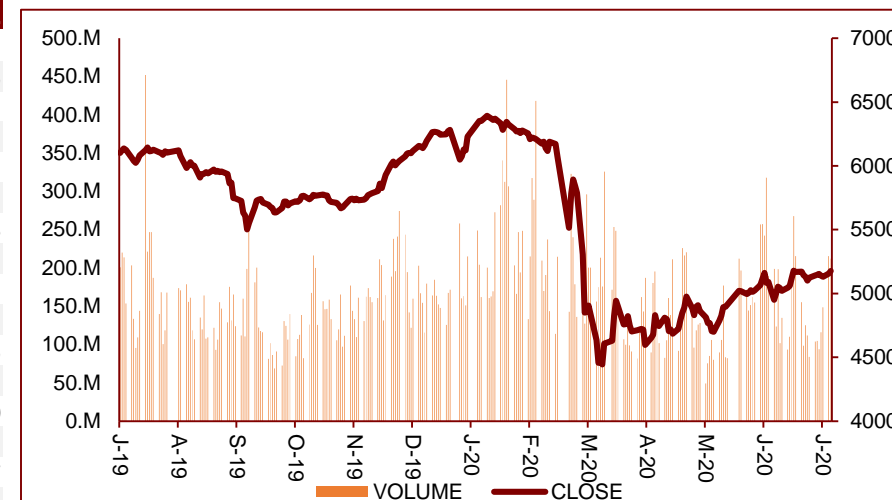
Tuesday, July 14, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,094.22	-1.60	-0.73	-0.71	-0.71	-18.91	30.01 KWD	1.53	15.36
Kuwait Permier Index	5,552.71	-1.91	-0.92	-0.97	-0.97	-20.40	21.85 KWD	1.63	15.41
Kuwait Main Index	4,189.36	-0.74	-0.21	-0.02	-0.02	-14.69	8.16 KWD	1.27	15.22
Kuwait Sector									
Banking	1,149.40	-1.68	-0.41	-0.93	-0.93	-22.48	17.36 KWD	1.57	15.79
Telecom	1,031.34	-1.83	-2.20	-0.47	-0.47	-7.64	3.22 KWD	1.75	11.13
Industrials	806.50	-2.35	-0.85	1.29	1.29	-13.05	2.95 KWD	1.41	17.11
Financial services	848.41	-1.25	-0.44	-2.25	-2.25	-21.55	2.19 KWD	0.83	12.05
Real estate	881.90	-0.66	-1.12	-1.27	-1.27	-16.70	1.91 KWD	0.94	12.82
Basic materials	841.53	-1.03	0.75	2.94	2.94	-7.33	0.76 KWD	1.21	18.66
Health care	839.19	0.00	0.00	2.21	2.21	-5.13	0.42 KWD	6.38	47.95
Consumer services	762.30	-1.13	-0.86	-1.99	-1.99	-28.91	0.40 KWD	1.50	9.10
Insurance	938.24	0.18	-2.89	-1.79	-1.79	-1.64	0.34 KWD	0.78	8.09
Consumer goods	693.92	-3.19	-3.67	-5.76	-5.76	8.91	0.22 KWD	1.51	31.17
Oil and Gas	1,096.14	-0.11	-0.53	0.45	0.45	-11.47	0.23 KWD	1.62	9.12
Technology	446.69	0.00	-9.70	-9.70	-9.70	-13.28	0.01 KWD	0.48	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	7,380.35	-0.43	-0.49	2.16	2.16	-12.03	8,427 SAR	5.39	29.27
Qatar (QE Index)	9,319.40	0.23	0.09	3.63	3.63	-10.56	493 QAR	1.67	30.40
Dubai (DFMGI)	2,052.76	-0.72	-1.41	-0.61	-0.61	-25.76	223 AED	0.96	7.99
Abu Dhabi (ADI)	4,287.82	-0.45	-0.18	0.05	0.05	-15.52	598 AED	3.93	17.69
Bahrain (BAX)	1,307.52	-0.58	1.65	2.34	2.34	-18.80	14 BHD	1.01	16.43
MUSCAT SE INDEX	3,504.16	0.19	0.29	-0.34	-0.34	-11.98	4 OMR	0.74	9.27
Developed Markets									
MSCI World Index	2,253.76	-0.26	-0.26	2.36	2.36	-4.44			
U.S. (S&P 500)	3,155.22	0.00	-0.94	1.77	1.77	-2.34			
U.K. (FTSE 100)	6,167.05	-0.15	1.18	-0.04	-0.04	-18.24			
Japan (Topix)	1,565.15	-0.50	1.95	0.41	0.41	-9.07			
Emerging Markets									
MSCI EM Index	1,071.36	0.20	0.20	7.66	7.66	-3.88			
China (SSE Composite)	3,414.62	-0.83	0.93	14.41	14.41	11.95			
India (Sensex)	36,033.06	-1.80	-1.52	3.22	3.22	-12.64			



What Move the GCC markets ,

Oil Prices

Oil prices fell around 2% in early trade on Tuesday on worries that new clampdowns on businesses to stem surging coronavirus cases in California and other U.S. states could threaten the nascent recovery in fuel demand.

Under their existing agreement, OPEC+ is set to taper its record supply cut of 9.7 million barrels per day to 7.7 million bpd from August through December.

Brent crude futures fell 24 cents, or 0.56% to \$42.48 a barrel

Kuwait Market

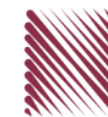
The market are closed today down by -1.6%, linked by uncertainty of the closer disclosures of companies semiannual financial results and fear of the second wave coronavirus effect of the global economy. *Value traded over 37.4 Million KD.*

Saudi Market

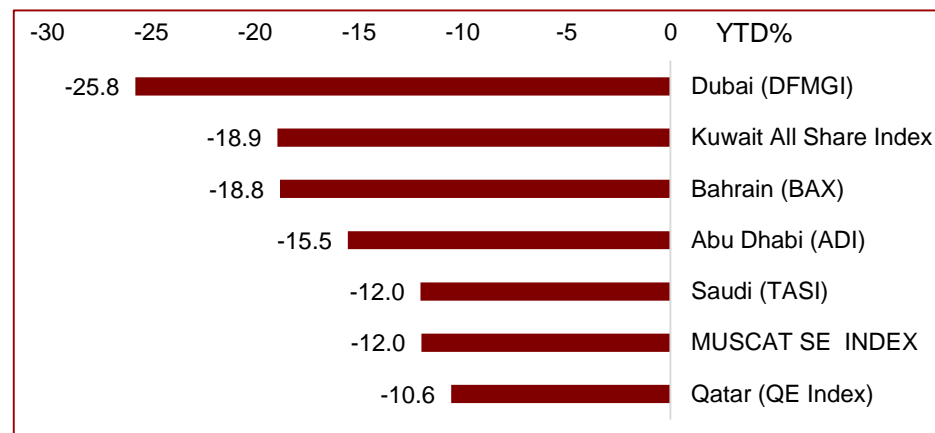
The Market closed down today by -0.43% , linked to the fear of coronavirus second wave , and the effect of the re-opening the local economy also the oil performance above 42\$ with the production cuts.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	0.805	-1.71	-0.62	-1.95	-1.95	-21.00	5.61 KWD	1.44	14.36
KFH	0.593	-1.50	-1.66	-3.10	-3.10	-19.57	4.62 KWD	2.02	18.51
Zain	0.551	-2.13	-2.82	-0.72	-0.72	-8.17	2.44 KWD	1.88	11.23
BOUBYAN BANK	0.535	-1.47	-0.19	0.56	0.56	-12.36	1.65 KWD	2.53	27.61
Agility	0.765	-2.92	-0.26	4.22	4.22	-6.48	1.39 KWD	1.19	15.59
Saudi Arabia									
ARAMCO	33.35	0.15	0.15	2.62	2.62	-5.39	6,659.82 SAR	6.22	21.50
SABIC	88.30	0.11	-0.45	0.23	0.23	-5.96	264.59 SAR	1.58	219.35
STC	96.90	-0.10	-1.12	-2.12	-2.12	-4.81	193.99 SAR	3.09	18.01
AL-RAJHI BANK	57.10	-0.70	-1.04	0.88	0.88	-12.69	143.75 SAR	2.90	14.56
NCB	35.90	-2.58	-3.23	-3.62	-3.62	-27.11	110.55 SAR	1.72	9.66
United Arab Emirates									
ETISALAT.AD	16.78	0.48	-0.24	1.09	1.09	1.96	145.23 AED	3.22	16.77
FAB.AD	10.98	-1.26	-0.18	-1.96	-1.96	-27.31	121.43 AED	1.29	10.76
EMIRATES NBD	8.62	-1.60	-3.04	-2.71	-2.71	-33.69	55.33 AED	0.70	3.82
DB ISLAMIC BK	3.88	-0.51	0.52	1.57	1.57	-29.58	28.24 AED	0.79	6.00
EMAAR PROPERT	2.62	-1.50	-4.73	-4.03	-4.03	-34.83	19.04 AED	0.35	3.07
Qatar									
QNB	18.05	-0.39	-0.39	3.97	3.97	-12.19	167.30 QAR	1.91	11.87
INDUSTRIES QAT	8.00	-0.63	-2.39	3.99	3.99	-22.15	48.69 QAR	1.52	23.15
QA ISLAMIC BK	15.85	0.32	-0.75	0.95	0.95	3.72	37.32 QAR	1.84	13.09
MASRAF AL RAYA	3.91	-0.05	-0.64	2.33	2.33	-1.29	29.32 QAR	2.30	13.45
MESAIEED PETRO	2.12	1.92	1.58	4.95	4.95	-15.54	26.12 QAR	1.81	27.01
OMAN									
BANK MUSCAT	0.334	0.00	0.00	0.00	0.00	-18.71	1.09 OMR	0.57	6.39
OMANTEL	0.628	0.00	0.00	-1.87	-1.87	1.95	0.47 OMR	0.83	6.06
BANK DHOFAR	0.105	0.00	0.00	0.00	0.00	-14.63	0.31 QAR	0.46	19.81
NAT BANK OF OMAN	0.166	0.00	0.00	-4.60	-4.60	-9.78	0.27 QAR	0.51	6.48
OMINVEST	0.322	0.00	0.59	0.59	0.59	3.64	0.28 QAR	0.89	8.64



Leading Sector Performance

Kuwait

The market are down today by -1.6 %The leading sector bottom performance indices today are Consumer goods -3.19 % Industrials -2.35 % Telecom -1.83 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 8.91 % while the bottom sector performance is Consumer services by -28.91 %

KFH has a positive price return performance spread over NBK in YTD perspective by +1.44%.

Banking sector performance year to date are -22.5 %

KSA

Saudi Armco are have positive performance today by + 0.15 %, SABIC have positive performance today by + 0.11 %compared to yesterday close .

STC are have negative performance today by -0.1 %, Al Rajhi Bank have negative performance today by -0.7 %

UAE

ETISALAT.AD are up today by +0.48% also less affected by the COVID 19 Crises as telecommunication sectors are outperform and act defensively on this crises.

Summary - Absolute change in Foreign Ownership

	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
1-Jul-20	16.57%	11.82%	0.09%	0.37%	0.35%	3.55%	3.39%	7.51%	3.33%	2.90%
8-Jul-20	16.54%	11.82%	0.09%	0.37%	0.35%	3.55%	3.38%	7.50%	3.34%	2.90%

End of Report

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شركة الاستثمار الوطنية
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