



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

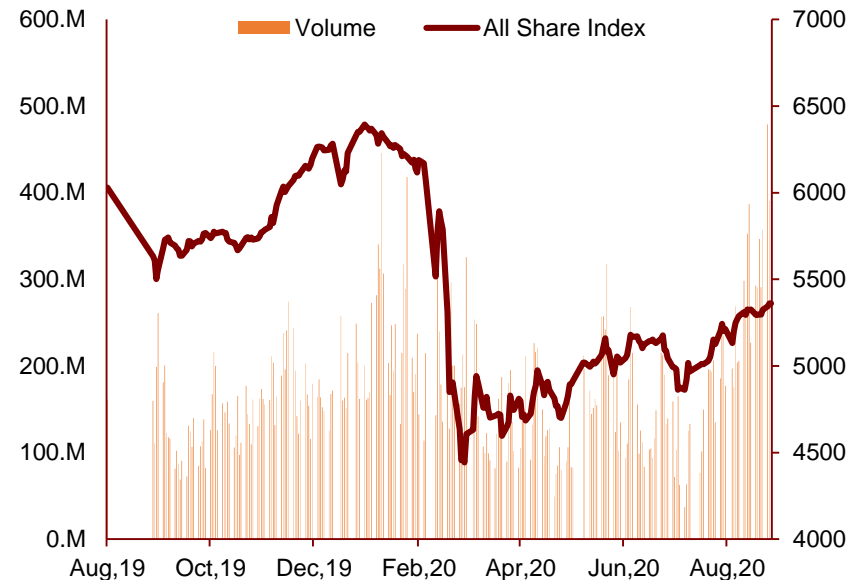
Tuesday, September 15, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	5,361.14	-0.02	0.69	1.26	4.49	-14.66	31.05 KWD	1.78	18.23
Kuwait Premier Index	5,882.28	0.09	0.80	0.47	4.91	-15.68	22.68 KWD	1.90	19.63
Kuwait Main Index	4,332.35	-0.31	0.38	3.52	3.40	-11.78	8.37 KWD	1.45	14.42
Kuwait Sector									
Banking	1,243.86	0.14	0.92	0.91	7.21	-16.11	18.42 KWD	1.97	19.23
Telecom	1,050.28	-0.75	-0.30	-1.91	1.35	-5.95	3.22 KWD	1.88	12.84
Industrials	789.71	-0.23	0.09	3.10	-0.82	-14.86	2.82 KWD	1.33	20.80
Financial services	912.85	-0.71	-0.17	4.28	5.18	-15.59	2.31 KWD	0.93	7.20
Real estate	911.00	0.20	1.81	4.29	1.99	-13.95	1.96 KWD	1.02	22.58
Basic materials	774.41	1.42	1.18	-0.79	-5.27	-14.72	0.69 KWD	1.20	18.49
Health care	829.21	0.00	0.00	0.00	1.00	-6.26	0.41 KWD	6.19	52.21
Consumer services	733.80	0.49	0.70	2.41	-5.65	-31.57	0.38 KWD	1.86	12.87
Insurance	996.95	-0.20	0.91	2.97	4.36	4.52	0.37 KWD	0.87	7.96
Consumer goods	769.26	0.85	0.13	-3.29	4.47	20.73	0.24 KWD	1.58	28.05
Oil and Gas	1,125.61	-0.71	-0.93	2.67	3.15	-9.09	0.23 KWD	1.61	10.43
Technology	523.80	-1.37	2.86	5.42	5.88	1.69	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)	8,321.74	0.80	2.29	4.80	15.19	-0.80	9,148 SAR	6.07	26.75
Qatar (QE Index)	9,892.54	0.20	1.38	0.54	10.00	-5.05	530 QAR	1.71	98.44
Dubai (DFMGI)	2,293.10	0.47	0.99	2.13	11.03	-17.06	247 AED	26.18	10.71
Abu Dhabi (ADI)	4,509.00	-0.14	-0.22	-0.23	5.21	-11.17	665 AED	4.44	15.28
Bahrain (BAX)	1,401.14	-0.03	0.82	1.47	9.67	-12.98	15 BHD	1.50	12.81
MUSCAT SE INDEX	3,677.77	-0.18	-0.23	-2.49	4.60	-7.62	4 OMR	0.75	11.15
Developed Markets									
MSCI World Index	2,396.37	1.19	1.19	-2.41	8.84	1.61			
U.S. (S&P 500)	3,383.54	1.09	1.27	-3.34	9.14	4.73			
U.K. (FTSE 100)	6,093.84	1.12	1.02	2.18	-1.23	-19.21			
Japan (Topix)	1,640.84	-0.62	0.26	1.40	5.27	-4.68			
Emerging Markets									
MSCI EM Index	1,104.27	1.14	1.14	0.25	10.97	-0.93			
China (SSE Composite)	3,295.68	0.51	1.08	-2.94	10.42	8.05			
India (Sensex)	39,044.35	0.74	0.49	1.08	11.82	-5.36			



What Move the GCC markets ,

Oil Prices

Oil prices edged slightly higher on Tuesday, but forecasts of a slower than expected recovery in global fuel demand due to the coronavirus pandemic weighed.

The International Energy Agency (IEA) on Tuesday trimmed its 2020 outlook by 200,000 barrels per day (bpd) to 91.7 million bpd, citing caution about the pace of economic recovery. **Brent crude was up 55 cents, or 1.4%, at \$40.16 a barrel**

Kuwait Market

The market are closed today down by -0.02% , 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

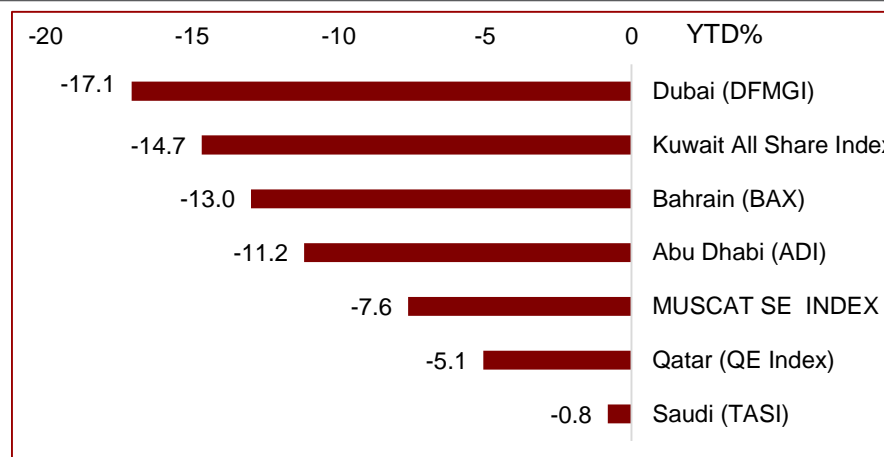
The Market closed today up by +0.80% , linked to the slow economic recovery over the globe and re-opening the global economy and oil prices over \$40 a barrel

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	0.861	-0.46	0.23	0.12	4.87	-15.51	5.90 KWD	1.66	20.77
KFH	0.630	0.16	0.80	0.64	2.94	-14.55	4.83 KWD	2.57	24.14
Zain	0.573	-0.69	-0.17	-2.88	3.24	-4.50	2.48 KWD	2.02	12.28
BOUBYAN BANK	0.590	-0.34	-0.67	2.08	10.90	-3.35	1.79 KWD	3.13	35.66
Agility	0.625	-0.64	-0.32	0.16	-2.08	-12.13	1.27 KWD	1.08	18.89
Saudi Arabia									
ARAMCO	36.15	0.28	1.26	1.69	11.23	2.55	7,210.00 SAR	7.03	29.63
SABIC	89.00	1.02	1.02	1.14	1.02	-5.22	264.30 SAR	1.62	0.00
STC	102.00	2.82	2.82	6.25	3.03	0.20	198.40 SAR	3.15	18.52
AL-RAJHI BANK	68.60	1.03	3.16	5.70	21.20	4.89	169.75 SAR	3.27	17.12
NCB	38.05	0.13	2.84	2.28	2.15	-22.74	114.00 SAR	1.55	10.37
United Arab Emirates									
ETISALAT.AD	16.52	0.00	-0.48	-0.36	0.00	0.86	143.67 AED	3.17	16.30
FAB.AD	11.30	-0.70	-1.40	-1.75	0.18	-25.73	123.40 AED	1.26	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	0.00	-0.69	5.12	12.83	-21.78	31.21 AED	0.85	7.54
EMAAR PROPERT	2.93	0.69	0.69	1.74	7.33	-27.11	20.98 AED	0.38	4.09
Qatar									
QNB	17.80	0.85	0.45	-1.11	2.36	-13.55	164.41 QAR	1.81	12.66
INDUSTRIES QAT	10.50	1.94	5.11	6.49	36.43	2.14	63.53 QAR	1.97	38.94
QA ISLAMIC BK	15.93	0.06	-0.31	-0.31	1.27	4.04	37.64 QAR	1.81	13.19
MASRAF AL RAYA	4.14	-0.27	-0.14	-0.62	8.48	4.65	31.05 QAR	2.34	14.25
MESAEED PETRO	2.11	-0.52	1.05	-0.28	4.65	-15.78	26.56 QAR	1.73	26.14
OMAN									
BANK MUSCAT	0.374	-1.57	-3.11	-6.03	11.31	-9.52	1.22 OMR	0.63	7.80
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	0.170	0.00	0.00	-4.49	-2.30	-7.61	0.28 QAR	0.52	7.14
OMINVEST	0.332	0.00	3.11	-0.60	-2.35	0.61	0.27 QAR	1.07	6.31



Leading Sector Performance

Kuwait

The market are down today by -0.02 % The leading sector bottom performance indices today are Technology -1.37 % Telecom -0.75 % Financial services -0.71 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 20.73 % while the bottom sector performance is Consumer services by -31.57 %.

Telecommunication sector are down today by -0.75 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 8.71 %

KSA

Saudi Armco are have positive performance today by + 0.28 %, SABIC have positive performance today by + 1.02 %

STC are have positive performance today by + 2.82 %, Al Rajhi Bank have positive performance today by + 1.03 %

UAE

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

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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