



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

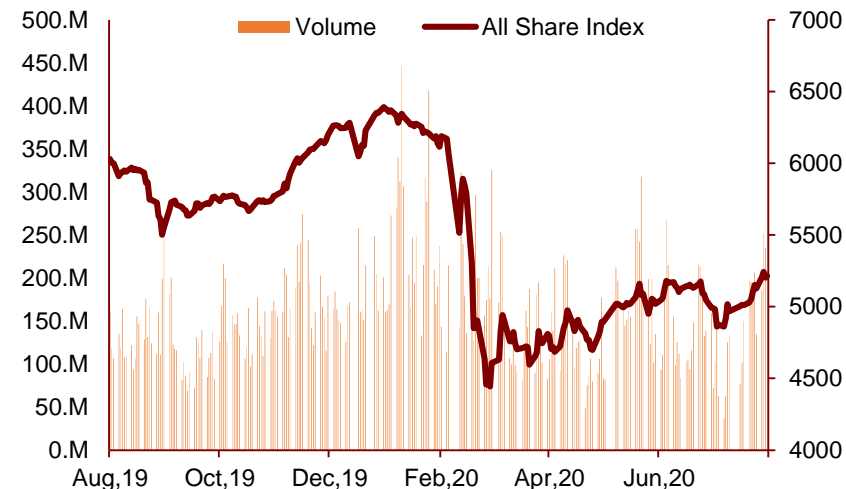
Wednesday, August 19, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,213.00	0.21	1.70	4.93	1.60	-17.02	30.18 KWD	1.72	18.39
Kuwait Premier Index	5,754.92	0.25	1.80	6.27	2.64	-17.50	22.18 KWD	1.86	19.04
Kuwait Main Index	4,140.58	0.10	1.39	1.34	-1.18	-15.68	8.00 KWD	1.32	16.58
Kuwait Sector									
Banking	1,206.59	0.37	2.51	7.35	4.00	-18.62	17.83 KWD	1.86	19.20
Telecom	1,067.79	0.15	2.11	5.71	3.04	-4.38	3.27 KWD	1.93	13.02
Industrials	758.79	0.22	-1.22	-1.91	-4.70	-18.19	2.71 KWD	1.24	18.42
Financial services	851.07	0.18	3.55	1.77	-1.94	-21.30	2.17 KWD	0.91	12.41
Real estate	877.48	-0.02	1.33	3.74	-1.77	-17.11	1.89 KWD	1.02	22.66
Basic materials	789.33	-0.04	0.40	3.53	-3.45	-13.08	0.70 KWD	1.15	17.11
Health care	839.19	0.00	0.00	0.00	2.21	-5.13	0.42 KWD	6.14	52.50
Consumer services	724.30	0.34	-1.98	-4.09	-6.87	-32.45	0.37 KWD	1.87	11.12
Insurance	936.29	-0.90	-1.62	-0.20	-1.99	-1.84	0.34 KWD	0.81	7.70
Consumer goods	786.63	-0.73	2.59	8.73	6.83	23.46	0.24 KWD	1.62	30.84
Oil and Gas	1,096.77	1.68	1.97	0.14	0.51	-11.42	0.23 KWD	1.60	10.12
Technology	440.87	-0.66	-1.46	-5.31	-10.88	-14.41	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)	7,853.05	-0.01	1.93	5.28	8.71	-6.39	8,660 SAR	5.71	25.75
Qatar (QE Index)	9,813.78	0.39	2.06	4.61	8.91	-6.00	517 QAR	1.69	58.47
Dubai (DFMGI)	2,246.78	1.00	4.24	9.56	8.79	-18.74	242 AED	43.84	10.22
Abu Dhabi (ADI)	4,500.66	1.24	2.60	4.55	5.01	-11.33	687 AED	4.56	14.32
Bahrain (BAX)	1,355.31	0.47	3.36	5.02	6.08	-15.83	15 BHD	1.22	19.85
MUSCAT SE INDEX	3,607.68	1.04	1.20	1.11	2.61	-9.38	4 OMR	0.75	10.52
Developed Markets									
MSCI World Index	2,399.37	0.23	0.64	4.10	8.97	1.73			
U.S. (S&P 500)	3,389.78	0.23	0.50	3.63	9.34	4.92			
U.K. (FTSE 100)	6,094.21	0.29	0.07	3.33	-1.22	-19.20			
Japan (Topix)	1,613.73	0.18	-0.59	7.87	3.53	-6.25			
Emerging Markets									
MSCI EM Index	1,104.96	0.45	1.08	2.41	11.04	-0.87			
China (SSE Composite)	3,408.13	-1.24	1.43	2.96	14.19	11.74			
India (Sensex)	38,614.79	0.22	1.97	2.71	10.62	-6.37			



What Move the GCC markets , Oil Prices

Oil prices eased on Wednesday as concerns grew that U.S. fuel demand may not recover quickly amid stalled talks on a post-coronavirus economic stimulus package, overshadowing a bigger-than-expected drawdown in U.S. crude stocks.

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 futures fell 38 cents, or 0.84%, to \$45.08 a barrel**

Kuwait Market

The market are closed today up by +0.21%, also close the +1.7% week in positive territory due to 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 also new companies traded and the expected positive effect to the market liquidity.

Saudi Market

The Market closed down today by -0.01% , 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

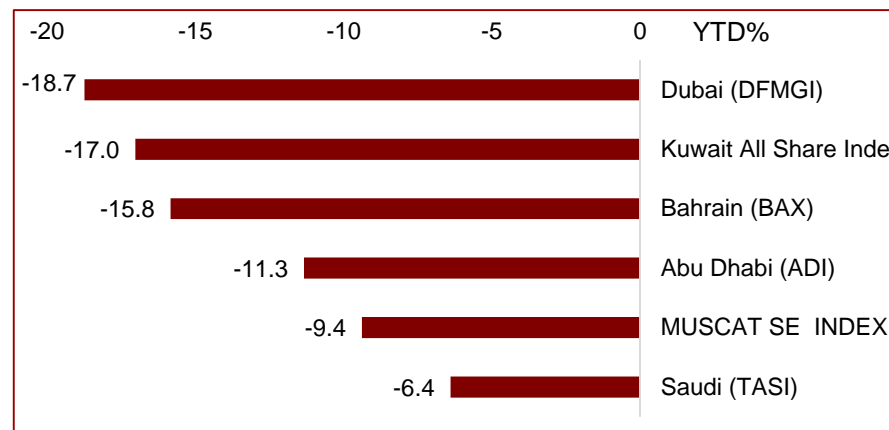


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.832	0.36	2.21	5.45	1.34	-18.36	5.70 KWD	1.61	19.90
KFH	0.617	0.65	0.49	6.75	0.82	-16.31	4.73 KWD	2.51	23.52
Zain	0.590	0.17	2.79	7.27	6.31	-1.67	2.55 KWD	2.08	12.53
BOUBYAN BANK	0.563	0.54	1.08	6.03	5.83	-7.78	1.70 KWD	2.99	33.73
Agility	0.617	-0.16	-3.74	-3.59	-3.33	-13.26	1.25 KWD	1.06	18.56
Saudi Arabia									
ARAMCO	34.15	0.44	1.94	3.48	5.08	-3.12	6,800.54 SAR	6.63	27.61
SABIC	88.10	-0.79	-0.79	-0.90	0.00	-6.18	266.42 SAR	1.63	0.00
STC	96.40	-0.41	-0.31	-0.82	-2.63	-5.30	193.62 SAR	3.08	18.07
AL-RAJHI BANK	64.70	0.31	3.03	9.85	14.31	-1.07	161.26 SAR	3.11	16.36
NCB	38.75	0.65	4.45	6.75	4.03	-21.32	115.51 SAR	1.58	10.61
United Arab Emirates									
ETISALAT.AD	16.98	0.59	1.56	1.44	2.30	3.18	147.67 AED	3.25	16.65
FAB.AD	11.32	1.25	2.35	3.85	0.89	-25.20	123.61 AED	1.27	11.66
EMIRATES NBD	10.70	2.39	10.26	21.61	21.33	-17.31	67.90 AED	0.83	5.81
DB ISLAMIC BK	4.11	0.98	5.66	9.02	7.59	-25.41	29.76 AED	0.81	7.12
EMAAR PROPERT	2.93	1.74	5.40	14.01	7.33	-27.11	20.98 AED	0.38	4.05
Qatar									
QNB	18.55	0.16	1.93	2.94	6.56	-10.00	171.34 QAR	1.89	13.29
INDUSTRIES QAT	8.94	0.45	1.59	14.32	16.16	-13.03	54.09 QAR	1.67	33.65
QA ISLAMIC BK	16.27	0.25	0.43	0.62	2.86	5.68	38.44 QAR	1.85	13.45
MASRAF AL RAYA	4.21	0.24	4.43	6.65	9.95	6.06	31.54 QAR	2.37	14.41
MESAIEED PETRO	2.16	0.19	0.05	3.17	6.49	-14.30	27.12 QAR	1.76	26.51
OMAN									
BANK MUSCAT	0.378	3.26	7.34	8.57	13.10	-8.06	1.23 OMR	0.63	7.51
OMANTEL	0.612	0.66	0.00	0.66	-4.37	-0.65	0.46 OMR	0.87	6.66
BANK DHOFAR	0.104	1.98	3.00	3.00	-1.90	-16.26	0.31 QAR	0.45	19.80
NAT BANK OF OMAN	0.178	0.00	3.55	3.55	0.57	-4.89	0.28 QAR	0.54	7.35
OMINVEST	0.338	0.00	0.00	-1.74	-0.59	2.42	0.27 QAR	1.09	6.43

Foreign Holdings										
Date	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 up today by +0.21 % The leading sector best performance indices today are Oil and Gas 1.68 % Banking 0.37 % Consumer services 0.34 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 23.46 % while the bottom sector performance is Consumer services by -32.45 %

Telecommunication sector are up today by +0.15 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by +12.64 %

KSA

Saudi Armco are have positive performance today by +0.44 %, SABIC have negative performance today by -0.79 %

STC are have negative performance today by -0.41 %, Al Rajhi Bank have positive performance today by +0.31 %

UAE

ETISALAT AD are up today by 0.59% , still outperform the market performance and act defensively with COVID19



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