



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



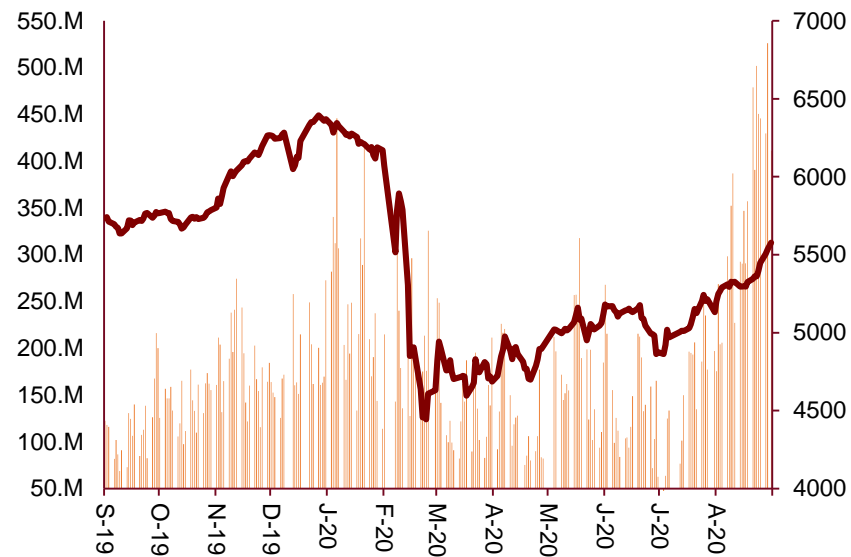
GCC DAILY MARKET WRAP

Wednesday, September 23, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,624.39	0.84	3.25	6.24	9.62	-10.47	32.40 KWD	1.88	18.85
Kuwait Premier Index	6,240.58	1.00	3.84	6.59	11.30	-10.54	23.89 KWD	2.00	20.69
Kuwait Main Index	4,400.01	0.35	1.56	5.14	5.01	-10.40	8.51 KWD	1.54	13.69
NIC 50	6,907.05	0.92	3.52	6.65	11.64	-7.39	27.54 KWD	1.48	14.96
Kuwait Sector									
Banking	1,319.14	1.09	4.07	7.02	13.70	-11.03	19.37 KWD	2.11	20.19
Telecom	1,074.17	0.42	1.20	0.32	3.66	-3.81	3.29 KWD	1.91	13.01
Industrials	826.48	0.57	2.41	7.90	3.80	-10.89	2.94 KWD	1.35	21.34
Financial services	934.79	0.55	2.20	6.78	7.70	-13.56	2.35 KWD	0.94	7.03
Real estate	974.40	0.58	4.52	11.54	9.08	-7.96	2.09 KWD	1.14	21.62
Basic materials	797.52	0.02	1.02	2.17	-2.45	-12.18	0.71 KWD	1.23	19.22
Health care	829.21	0.00	0.00	0.00	1.00	-6.26	0.41 KWD	6.19	52.21
Consumer services	742.13	-0.58	0.50	3.57	-4.58	-30.79	0.39 KWD	1.86	13.41
Insurance	1,024.95	1.42	3.62	5.87	7.29	7.45	0.37 KWD	0.88	8.04
Consumer goods	775.75	1.25	1.47	-2.47	5.35	21.75	0.24 KWD	1.58	28.17
Oil and Gas	1,146.64	0.06	0.39	4.58	5.08	-7.39	0.24 KWD	1.68	10.70
Technology	535.44	2.22	5.45	7.76	8.24	3.95	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)	8,244.82	-0.56	-1.12	3.83	14.13	-1.72	9,265 SAR	6.17	27.49
Qatar (QE Index)	9,787.27	-0.55	-1.29	-0.32	9.06	-5.87	522 QAR	1.69	96.11
Dubai (DFMGI)	2,285.46	0.94	-1.53	1.79	10.66	-17.34	244 AED	27.17	10.72
Abu Dhabi (ADI)	4,490.23	-0.18	-0.45	-0.64	4.77	-11.54	669 AED	4.48	15.32
Bahrain (BAX)	1,450.91	0.56	1.09	5.07	13.56	-9.89	16 BHD	1.73	13.15
MUSCAT SE INDEX	3,621.66	-0.14	-0.71	-3.98	3.01	-9.03	4 OMR	0.75	10.90
Developed Markets									
MSCI World Index	2,343.39	0.60	-1.04	-4.57	6.43	-0.64			
U.S. (S&P 500)	3,315.57	0.00	-0.12	-5.28	6.94	2.62			
U.K. (FTSE 100)	5,947.41	2.02	-0.99	-0.27	-3.60	-21.15			
Japan (Topix)	1,644.25	-0.13	-0.13	1.61	5.48	-4.48			
Emerging Markets									
MSCI EM Index	1,082.87	-0.69	-2.32	-1.69	8.82	-2.85			
China (SSE Composite)	3,279.71	0.17	-1.75	-3.42	9.89	7.53			
India (Sensex)	37,668.42	-0.17	-3.05	-2.51	7.86	-8.71			

What Move the GCC markets ,

Oil Prices

Oil prices fell on Wednesday after an industry group reported a surprise rise in U.S. crude, adding to worries about demand that led to a steep selloff earlier in the week.

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 trading down 30 cents, or 0.7%, at \$41.42 a barrel**

Kuwait Market

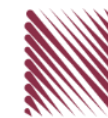
The market are closed today up by +0.84% , after re-opening the local economy , oil performance , MSCI positive liquidity expectation , New IPO`s Boursa Kuwait Co , today value traded are over 67.4 million KD.

Saudi Market

The Market closed today down by -0.56% , 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



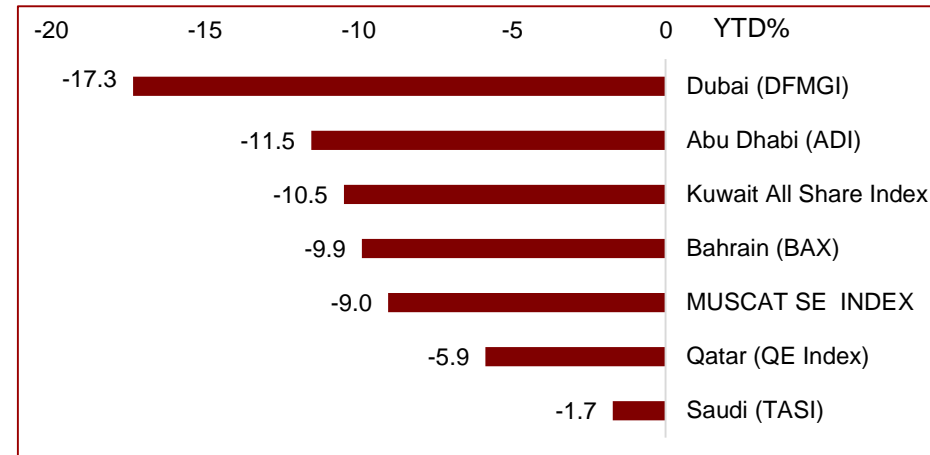
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.899	1.01	3.21	4.53	9.50	-11.78	6.11 KWD	1.72	21.37
KFH	0.694	1.76	8.10	10.86	13.40	-5.87	5.25 KWD	2.78	26.17
Zain	0.586	0.17	0.86	-0.68	5.59	-2.33	2.54 KWD	2.06	12.45
BOUBYAN BANK	0.604	0.50	1.34	4.50	13.53	-1.06	1.82 KWD	3.19	36.20
Agility	0.678	1.04	3.83	8.65	6.23	-4.68	1.36 KWD	1.16	20.16
Saudi Arabia									
ARAMCO	36.65	-0.81	0.00	3.09	12.77	3.97	7,330.00 SAR	7.14	30.45
SABIC	89.60	-0.44	-0.33	1.82	1.70	-4.58	268.80 SAR	1.64	0.00
STC	100.60	0.00	-1.37	4.79	1.62	-1.18	201.20 SAR	3.20	19.06
AL-RAJHI BANK	66.60	-1.04	-1.77	2.62	17.67	1.83	166.50 SAR	3.21	17.27
NCB	37.50	0.00	-0.79	0.81	0.67	-23.86	112.50 SAR	1.53	10.60
United Arab Emirates									
ETISALAT.AD	16.54	-0.12	-1.67	-0.24	0.12	0.98	144.02 AED	3.17	16.34
FAB.AD	11.20	-0.36	0.72	-1.92	0.00	-25.86	122.74 AED	1.26	11.72
EMIRATES NBD	10.60	0.95	-3.64	-1.85	19.64	-18.46	66.32 AED	0.81	5.83
DB ISLAMIC BK	4.30	2.38	-1.15	4.88	12.57	-21.96	30.41 AED	0.83	7.35
EMAAR PROPERT	2.92	0.69	-2.34	1.39	6.96	-27.36	20.76 AED	0.37	4.07
Qatar									
QNB	17.51	-0.91	-2.18	-2.72	0.69	-14.96	162.17 QAR	1.80	12.68
INDUSTRIES QAT	9.92	-0.76	-3.91	0.86	29.22	-3.26	60.09 QAR	1.87	37.79
QA ISLAMIC BK	16.00	-0.31	-1.11	-0.12	1.46	4.24	37.68 QAR	1.82	13.30
MASRAF AL RAYA	4.14	0.00	-1.41	-0.72	8.38	4.55	30.85 QAR	2.34	14.22
MESAIEED PETRO	2.10	-0.71	-4.64	-1.04	3.86	-16.41	26.36 QAR	1.72	25.98
OMAN									
BANK MUSCAT	0.364	-0.54	-1.61	-8.04	8.93	-11.45	1.20 OMR	0.61	7.51
OMANTEL	0.632	0.64	1.28	0.64	-1.25	2.60	0.47 OMR	0.89	6.88
BANK DHOFAR	0.105	0.00	-6.25	-5.41	0.00	-14.63	0.31 QAR	0.46	20.59
NAT BANK OF OMAN	0.163	-1.79	0.00	-7.30	-5.17	-10.33	0.27 QAR	0.51	7.06
OMINVEST	0.332	0.00	0.00	-0.60	-2.35	0.61	0.27 QAR	1.07	6.31

Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
9-Sep-20	16.68%	11.69%	0.07%	0.32%	0.31%	3.65%	3.54%	7.72%	3.46%	2.94%
16-Sep-20	16.75%	11.76%	0.07%	0.31%	0.30%	3.66%	3.54%	7.76%	3.50%	2.94%

End of Report

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Leading Sector Performance

Kuwait

The market are up today by + 0.84 % The leading sector best performance indices today are Technology 2.22 % Insurance 1.42 % Consumer goods 1.25 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 21.75 % while the bottom sector performance is Consumer services by -30.79 %.

Telecommunication sector are up today by + 0.42 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 6.66 %

KSA

Saudi Armco are have negative performance today by -0.81 %, SABIC have negative performance today by -0.44 %

STC are flat performance today 0 %, Al Rajhi Bank have negative performance today by -1.04 %

UAE

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



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