



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

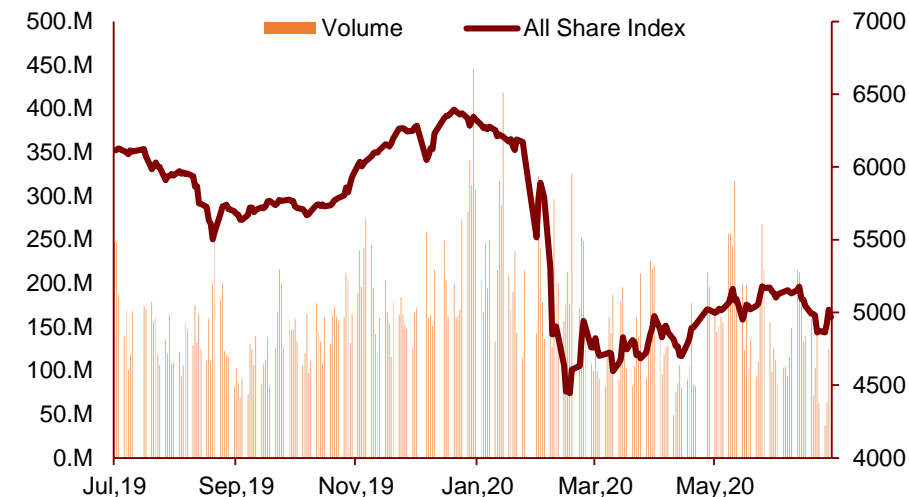
Wednesday, July 29, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	4,968.23	-1.00	1.92	-3.17	-3.17	-20.92	29.01 KWD	1.50	15.10
Kuwait Permier Index	5,415.27	-1.34	2.57	-3.42	-3.42	-22.37	21.12 KWD	1.59	15.12
Kuwait Main Index	4,085.97	-0.08	0.22	-2.48	-2.48	-16.79	7.89 KWD	1.26	15.05
Kuwait Sector									
Banking	1,123.94	-1.71	2.32	-3.12	-3.12	-24.19	16.92 KWD	1.55	15.43
Telecom	1,010.12	0.48	3.62	-2.52	-2.52	-9.54	3.08 KWD	1.79	12.34
Industrials	773.59	-0.37	1.43	-2.85	-2.85	-16.59	2.77 KWD	1.33	16.75
Financial services	836.26	-0.40	0.62	-3.65	-3.65	-22.67	2.13 KWD	0.80	11.55
Real estate	845.86	-0.22	1.33	-5.31	-5.31	-20.10	1.82 KWD	0.90	11.98
Basic materials	762.45	0.40	-5.21	-6.74	-6.74	-16.04	0.68 KWD	1.09	16.13
Health care	839.19	0.00	0.00	2.21	2.21	-5.13	0.42 KWD	6.29	47.76
Consumer services	755.22	1.26	2.72	-2.90	-2.90	-29.57	0.39 KWD	1.42	8.80
Insurance	938.17	-0.01	0.06	-1.80	-1.80	-1.65	0.35 KWD	0.78	8.10
Consumer goods	723.45	0.05	1.34	-1.75	-1.75	13.54	0.22 KWD	1.54	31.41
Oil and Gas	1,095.28	0.26	0.39	0.37	0.37	-11.54	0.23 KWD	1.63	9.16
Technology	465.60	0.00	0.00	-5.88	-5.88	-9.60	0.01 KWD	0.50	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	7,459.21	0.05	0.44	3.25	3.25	-11.09	8,381 SAR	5.34	28.47
Qatar (QE Index)	9,368.17	-0.04	-0.01	4.10	4.10	-10.15	497 QAR	1.64	33.35
Dubai (DFMGI)	2,050.77	-0.70	-0.09	-0.70	-0.70	-25.83	223 AED	0.98	8.80
Abu Dhabi (ADI)	4,304.74	-0.45	1.02	0.44	0.44	-15.19	631 AED	4.34	18.40
Bahrain (BAX)	1,290.57	0.11	0.46	1.01	1.01	-19.85	14 BHD	1.02	16.53
MUSCAT SE INDEX	3,568.10	0.28	0.10	1.47	1.47	-10.39	4 OMR	0.73	9.68
Developed Markets									
MSCI World Index	2,299.91	-0.51	0.36	4.46	4.46	-2.48			
U.S. (S&P 500)	3,218.44	0.00	0.09	3.81	3.81	-0.38			
U.K. (FTSE 100)	6,138.06	0.14	0.23	-0.51	-0.51	-18.62			
Japan (Topix)	1,549.04	-1.28	-1.52	-0.62	-0.62	-10.01			
Emerging Markets									
MSCI EM Index	1,082.02	0.83	2.03	8.73	8.73	-2.93			
China (SSE Composite)	3,294.55	2.06	3.06	10.38	10.38	8.01			
India (Sensex)	38,071.13	-1.10	-0.15	9.04	9.04	-7.71			



What Move the GCC markets , Oil Prices

Oil prices rose on Wednesday after an industry report showed that crude inventories in the United States fell against expectations, giving the market a boost amid record increases of coronavirus infections in the U.S. and elsewhere.

Inventories of crude oil in the U.S. dropped by 6.8 million barrels last week to 531 million barrels, data from industry group the American Petroleum Institute showed on Tuesday. **Brent crude futures were up by 49 cents, or 1.13%, at \$43.71 a barrel**

Kuwait Market

The market are closed today down by -1.0%, with the companies Disclosure of impact of the events arising from the Novel Coronavirus Outbreak on the Financial Statements and the negative effect on corporate earnings . **Value traded over 29.7 Million KD.**

Saudi Market

The Market closed up this week by +0.44% , linked to the effect of the re-opening the local economy also the oil performance above 43\$ with the production cuts.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



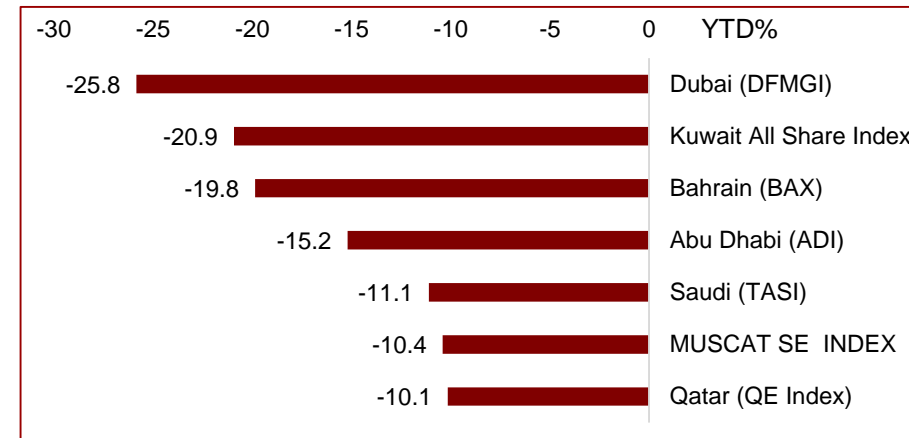
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	0.789	-1.38	4.09	-3.90	-3.90	-22.57	5.48 KWD	1.40	14.03
KFH	0.578	-2.36	1.76	-5.56	-5.56	-21.60	4.54 KWD	1.98	18.21
Zain	0.550	0.92	5.16	-0.90	-0.90	-8.33	2.36 KWD	1.92	11.60
BOUBYAN BANK	0.531	-0.38	5.36	-0.19	-0.19	-13.02	1.61 KWD	2.48	27.10
Agility	0.640	-0.78	2.22	0.27	0.27	-10.02	1.31 KWD	1.12	14.67
Saudi Arabia									
ARAMCO	33.00	0.15	0.00	1.54	1.54	-6.38	6,600.88 SAR	6.17	21.05
SABIC	88.90	0.45	1.02	0.91	0.91	-5.32	266.74 SAR	1.60	217.86
STC	97.20	0.10	0.10	-1.82	-1.82	-4.52	194.43 SAR	3.09	18.14
AL-RAJHI BANK	58.90	-0.17	1.90	4.06	4.06	-9.94	147.27 SAR	2.97	15.01
NCB	36.30	0.83	1.26	-2.55	-2.55	-26.29	108.91 SAR	1.69	9.37
United Arab Emirates									
ETISALAT.AD	16.64	-1.54	-1.77	0.97	0.97	1.83	146.98 AED	3.24	16.67
FAB.AD	10.92	-0.36	2.82	-2.85	-2.85	-27.97	119.68 AED	1.28	11.36
EMIRATES NBD	8.84	-0.34	-0.56	-0.23	-0.23	-32.00	56.03 AED	0.69	4.93
DB ISLAMIC BK	3.77	-0.79	-0.79	-1.31	-1.31	-31.58	27.51 AED	0.75	6.65
EMAAR PROPERT	2.57	-0.77	-1.15	-5.86	-5.86	-36.07	18.54 AED	0.34	2.99
Qatar									
QNB	18.00	-0.50	-0.11	3.91	3.91	-12.24	167.09 QAR	1.84	12.98
INDUSTRIES QAT	7.82	-0.08	-3.67	2.01	2.01	-23.63	47.35 QAR	1.48	29.20
QA ISLAMIC BK	16.10	0.06	0.63	2.22	2.22	5.02	38.02 QAR	1.83	13.33
MASRAF AL RAYA	3.94	0.79	0.98	2.83	2.83	-0.81	29.30 QAR	2.20	13.42
MESAIEED PETRO	2.09	-0.71	0.19	3.22	3.22	-16.93	26.38 QAR	1.83	27.27
OMAN									
BANK MUSCAT	0.350	0.58	0.00	3.57	3.57	-15.81	1.12 OMR	0.59	6.58
OMANTEL	0.608	0.00	0.66	-4.37	-4.37	-0.65	0.46 OMR	0.81	5.91
BANK DHOFAR	0.100	1.00	1.00	-3.81	-3.81	-17.89	0.30 QAR	0.44	18.87
NAT BANK OF OMAN	0.169	0.00	0.00	-2.87	-2.87	-8.15	0.27 QAR	0.52	6.60
OMINVEST	0.344	0.00	0.58	1.18	1.18	4.24	0.28 QAR	0.89	8.69

Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
15-Jul-20	16.48%	11.83%	0.09%	0.36%	0.32%	3.53%	3.38%	7.54%	3.34%	2.90%
22-Jul-20	16.47%	11.62%	0.09%	0.38%	0.33%	3.56%	3.38%	7.60%	3.37%	2.92%

End of Report

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Leading Sector Performance

Kuwait

The market are down today by -1 % The leading sector bottom performance indices today are Banking -1.71 % Financial services -0.4 % Industrials -0.37 % respectively

from YTD performance perspective the best sector performance are Consumer goods by 13.54 % while the bottom sector performance is Consumer services by -29.57 %

KFH has a positive price return performance spread over NBK in YTD perspective by +0.97%. Banking sector performance year to date are -24.19 %.

KSA

Saudi Armco are have positive performance today by + 0.15 %, SABIC have positive performance today by + 0.45 %

STC are have positive performance today by + 0.1 %, Al Rajhi Bank have negative performance today by -0.17 %

UAE

ETISALAT AD are down today by -1.54% , still outperform the market performance and act defensively with COVID19



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