



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

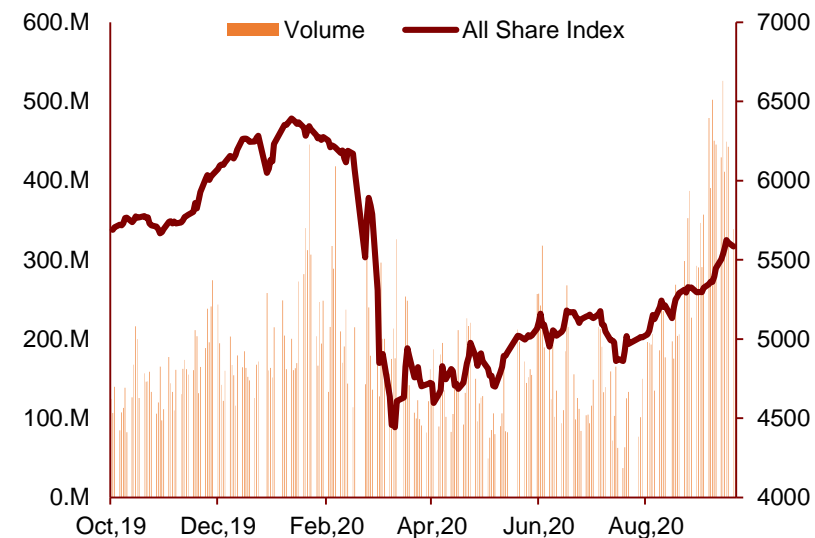
Monday, September 28, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,566.72	-0.32	-0.75	5.15	8.50	-11.39	32.40 KWD	1.90	18.90
Kuwait Premier Index	6,155.89	-0.45	2.89	5.62	10.28	-11.36	23.87 KWD	2.00	20.82
Kuwait Main Index	4,398.13	0.06	1.46	5.03	4.90	-10.49	8.53 KWD	1.63	13.53
NIC 50	6,825.20	-0.38	3.52	6.65	11.64	-8.50	27.54 KWD	1.48	14.96
Kuwait Sector									
Banking	1,299.44	-0.55	-0.65	6.00	12.62	-11.87	19.39 KWD	2.15	20.34
Telecom	1,064.27	-0.36	-0.11	-0.25	3.07	-4.35	3.27 KWD	1.91	13.02
Industrials	823.53	0.37	-0.45	7.13	3.05	-11.54	2.93 KWD	1.33	21.51
Financial services	933.09	-0.33	-0.33	6.94	7.86	-13.44	2.36 KWD	0.94	6.93
Real estate	971.10	-0.27	0.11	11.46	9.01	-8.02	2.09 KWD	1.13	21.06
Basic materials	792.95	-0.20	0.51	1.78	-2.81	-12.51	0.71 KWD	1.23	18.99
Health care	820.13	0.00	0.00	-1.09	-0.11	-7.28	0.41 KWD	6.22	51.97
Consumer services	752.12	1.04	1.14	3.89	-4.29	-30.58	0.39 KWD	1.89	13.13
Insurance	1,062.00	3.97	0.36	5.51	6.92	7.09	0.38 KWD	0.90	8.12
Consumer goods	764.87	-0.04	-0.49	-3.80	3.92	20.09	0.23 KWD	1.57	28.26
Oil and Gas	1,147.77	0.11	0.00	4.57	5.07	-7.41	0.24 KWD	1.68	10.77
Technology	524.53	-1.23	-1.35	6.88	7.35	3.11	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)	8,334.65	0.49	1.20	4.96	15.37	-0.65	9,271 SAR	6.18	27.25
Qatar (QE Index)	9,883.90	0.70	0.98	0.40	9.84	-5.19	524 QAR	1.68	97.23
Dubai (DFMGI)	2,261.49	0.74	0.41	0.72	9.50	-18.21	242 AED	22.88	10.67
Abu Dhabi (ADI)	4,492.18	0.14	0.57	-0.60	4.82	-11.50	668 AED	4.53	15.34
Bahrain (BAX)	1,451.14	0.05	1.11	5.09	13.58	-9.88	16 BHD	1.89	13.14
MUSCAT SE INDEX	3,621.41	0.01	-0.15	-3.99	3.00	-9.04	4 OMR	0.75	10.87
Developed Markets									
MSCI World Index	2,326.85	1.15	-1.74	-5.24	5.68	-1.34			
U.S. (S&P 500)	3,298.46	1.60	-0.63	-5.77	6.39	2.09			
U.K. (FTSE 100)	5,940.89	1.68	-2.74	-2.03	-5.30	-22.54			
Japan (Topix)	1,661.93	1.69	-0.74	0.99	4.84	-5.06			
Emerging Markets									
MSCI EM Index	1,059.10	0.13	-4.46	-3.85	6.43	-4.98			
China (SSE Composite)	3,217.53	-0.06	-3.56	-5.19	7.87	5.55			
India (Sensex)	37,981.63	1.59	-3.75	-3.21	7.08	-9.37			



What Move the GCC markets ,

Oil Prices

Oil prices were slightly higher on Monday despite rising coronavirus cases that upset hopes for a smooth recovery in fuel demand, with the main crude benchmarks on track for their first monthly falls in multiple months after last week's slips.

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 traded 3 cents higher at \$41.95 per barrel, after dropping 2.9% last week**

Kuwait Market

The market are closed today down by -0.32%, with fear of the second wave Covid19 , oil performance , today value traded are over 38.9 million KD.

Saudi Market

The Market closed today down by +0.49% , linked to the economic recovery over the globe and re-opening the global economy and oil prices over \$41 a barrel.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



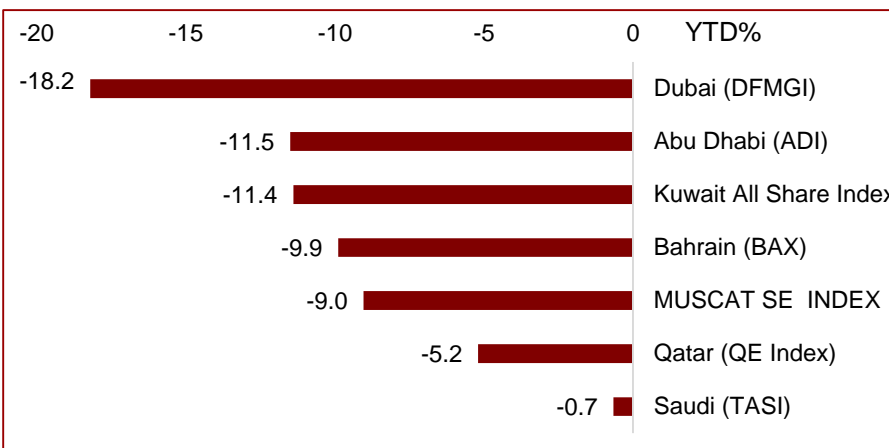
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.887	-0.34	2.18	3.49	8.40	-12.66	6.10 KWD	1.72	21.46
KFH	0.677	-1.02	6.54	9.27	11.76	-7.23	5.25 KWD	2.79	26.59
Zain	0.582	-0.34	0.52	-1.02	5.23	-2.67	2.53 KWD	2.06	12.45
BOUBYAN BANK	0.598	-0.50	0.84	3.98	12.97	-1.55	1.82 KWD	3.19	36.38
Agility	0.678	0.74	3.06	7.85	5.44	-5.39	1.36 KWD	1.16	20.37
Saudi Arabia									
ARAMCO	36.55	-0.14	-0.14	2.95	12.62	3.83	7,340.00 SAR	7.15	30.20
SABIC	88.90	0.23	-1.33	0.80	0.68	-5.54	266.40 SAR	1.63	0.00
STC	102.00	1.80	-1.76	4.38	1.21	-1.57	200.00 SAR	3.18	18.80
AL-RAJHI BANK	66.50	-0.30	-1.62	2.77	17.84	1.99	167.00 SAR	3.22	16.99
NCB	37.45	0.40	-1.32	0.27	0.13	-24.26	111.90 SAR	1.53	10.51
United Arab Emirates									
ETISALAT.AD	16.54	-0.12	-1.19	0.24	0.61	1.47	144.02 AED	3.17	16.38
FAB.AD	11.14	-0.54	0.36	-2.27	-0.36	-26.12	122.30 AED	1.25	11.57
EMIRATES NBD	10.50	1.94	-6.36	-4.63	16.25	-20.77	65.06 AED	0.80	5.81
DB ISLAMIC BK	4.31	1.17	-2.07	3.90	11.52	-22.69	30.85 AED	0.84	7.47
EMAAR PROPERT	2.83	-0.35	-5.02	-1.39	4.03	-29.35	20.33 AED	0.36	4.00
Qatar									
QNB	17.70	1.43	-2.51	-3.06	0.35	-15.25	161.18 QAR	1.78	12.45
INDUSTRIES QAT	9.94	-0.20	-3.77	1.01	29.42	-3.11	60.26 QAR	1.87	37.66
QA ISLAMIC BK	15.94	0.00	-0.06	-0.37	1.21	3.98	37.67 QAR	1.81	13.22
MASRAF AL RAYA	4.12	0.41	0.32	-1.61	7.41	3.61	30.77 QAR	2.31	14.05
MESAIED PETRO	2.09	0.97	0.10	-2.36	2.48	-17.53	26.01 QAR	1.69	25.44
OMAN									
BANK MUSCAT	0.364	-1.09	-2.15	-8.54	8.33	-11.94	1.18 OMR	0.61	7.51
OMANTEL	0.632	0.00	1.28	0.64	-1.25	2.60	0.47 OMR	0.89	6.92
BANK DHOFAR	0.105	0.00	0.00	-5.41	0.00	-14.63	0.31 QAR	0.46	20.59
NAT BANK OF OMAN	0.167	-0.60	-1.76	-6.18	-4.02	-9.24	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

The market are down today by -0.44 % The leading sector bottom performance indices today are Technology -1.35 % Banking -0.65 % Consumer goods -0.49 % respectively

from YTD performance perspective the best sector performance are Consumer goods by 20.09 % while the bottom sector performance is Consumer services by -30.58 %

Telecommunication sector are down today by -0.36 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 11.39 %

KSA

Saudi Armco are have negative performance today by -0.14 %, SABIC have positive performance today by + 0.23 %.

STC are have positive performance today by + 1.8 %, Al Rajhi Bank have negative performance today by -0.3 %

UAE

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



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