



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



## GCC DAILY MARKET WRAP

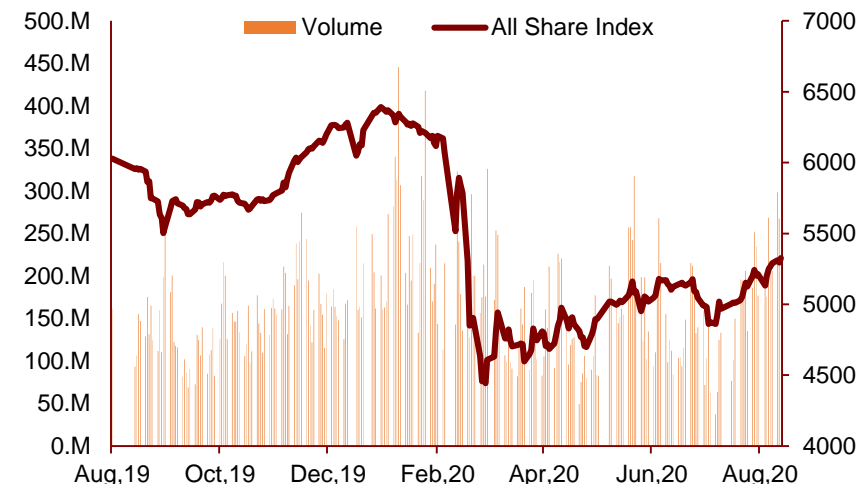
Tuesday, September 1, 2020



### Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>									
		%	%	%	%	%			
Kuwait All Share Index	5,326.87	0.62	0.71	0.62	3.82	-15.21	30.88 KWD	1.77	18.21
Kuwait Premier Index	5,889.07	0.59	0.62	0.59	5.03	-15.58	22.75 KWD	1.91	19.54
Kuwait Main Index	4,213.71	0.69	0.99	0.69	0.56	-14.19	8.13 KWD	1.38	14.51
<b>Kuwait Sector</b>									
Banking	1,240.06	0.60	0.84	0.60	6.89	-16.36	18.36 KWD	1.94	19.12
Telecom	1,069.19	-0.14	-0.41	-0.14	3.18	-4.25	3.28 KWD	1.93	12.93
Industrials	770.83	0.64	0.77	0.64	-3.19	-16.89	2.76 KWD	1.24	20.19
Financial services	890.71	1.75	2.43	1.75	2.63	-17.64	2.26 KWD	0.94	8.17
Real estate	885.32	1.35	0.44	1.35	-0.89	-16.37	1.90 KWD	1.00	22.73
Basic materials	783.85	0.42	0.46	0.42	-4.12	-13.68	0.70 KWD	1.16	18.73
Health care	829.21	0.00	0.00	0.00	1.00	-6.26	0.41 KWD	6.19	52.21
Consumer services	721.76	0.73	0.44	0.73	-7.20	-32.69	0.37 KWD	1.88	12.63
Insurance	964.92	-0.33	0.36	-0.33	1.00	1.16	0.36 KWD	0.84	7.76
Consumer goods	805.59	1.28	-0.25	1.28	9.41	26.43	0.25 KWD	1.67	29.34
Oil and Gas	1,074.74	-1.97	-2.44	-1.97	-1.51	-13.20	0.22 KWD	1.47	10.12
Technology	472.15	-4.98	-4.56	-4.98	-4.56	-8.33	0.01 KWD	0.53	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>									
		%	%	%	%	%			
Saudi (TASI)	7,898.86	-0.53	-0.45	-0.53	9.34	-5.85	8,977 SAR	5.98	26.12
Qatar (QE Index)	9,850.68	0.06	-0.33	0.06	9.47	-5.51	516 QAR	1.68	61.15
Dubai (DFMGI)	2,252.39	0.32	-0.74	0.32	9.06	-18.54	243 AED	41.61	10.68
Abu Dhabi (ADI)	4,525.41	0.13	-0.21	0.13	5.59	-10.84	678 AED	4.48	14.93
Bahrain (BAX)	1,405.62	1.79	1.79	1.79	10.02	-12.70	15 BHD	1.39	13.38
MUSCAT SE INDEX	3,780.25	0.22	1.14	0.22	7.52	-5.05	4 OMR	0.77	11.39
<b>Developed Markets</b>									
MSCI World Index	2,455.51	-0.05	-0.05	0.00	11.52	4.11			
U.S. (S&P 500)	3,500.31	-0.22	-0.22	7.01	12.90	8.34			
U.K. (FTSE 100)	5,888.68	-1.26	-1.26	-1.26	-4.56	-21.93			
Japan (Topix)	1,615.81	-0.15	0.68	-0.15	3.66	-6.13			
<b>Emerging Markets</b>									
MSCI EM Index	1,101.50	-1.79	-1.79	0.00	10.69	-1.18			
China (SSE Composite)	3,410.61	0.44	0.20	0.44	14.27	11.82			
India (Sensex)	38,900.80	0.71	-1.29	0.85	11.57	-5.57			



### What Move the GCC markets , Oil Prices

Oil prices rose on Tuesday, reversing overnight losses against the backdrop of an equities bull run and a sliding U.S. dollar.

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 climbed 57 cents to \$45.85 a barrel.**

### Kuwait Market

The market are closed today up by +0.62% , while closing August 2020 month in positive territory by 6.6% , 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

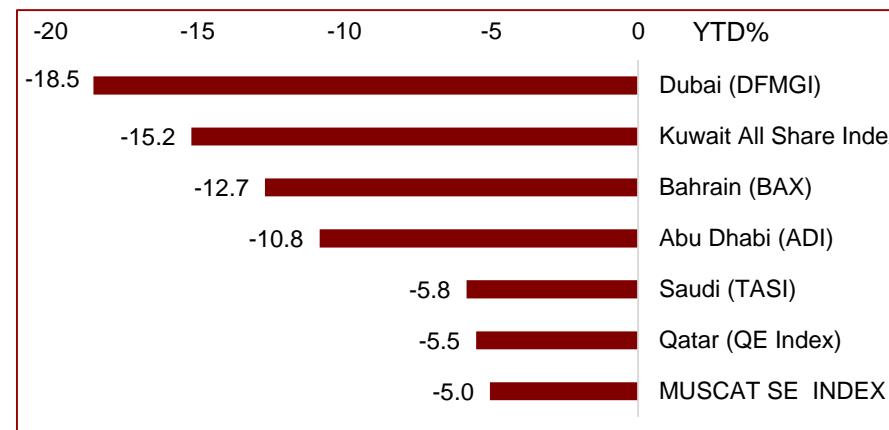
The Market closed down today by -0.53% , while closed August 2020up by +6.5% linked to the effect of the re-opining the local economy also the oil performance above 45\$ with the production cuts.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	0.865	0.58	-0.12	0.58	5.36	-15.12	5.93 KWD	1.67	20.65
KFH	0.631	0.80	0.80	0.80	3.10	-14.41	4.84 KWD	2.57	24.02
Zain	0.590	0.00	-0.34	0.00	6.31	-1.67	2.55 KWD	2.08	12.55
BOUBYAN BANK	0.583	0.87	2.28	0.87	9.59	-4.50	1.77 KWD	3.09	34.82
Agility	0.627	0.48	0.32	0.48	-1.76	-11.85	1.27 KWD	1.08	18.74
<b>Saudi Arabia</b>									
ARAMCO	35.25	-0.84	0.71	-0.84	8.46	0.00	7,110.19 SAR	6.93	28.92
SABIC	87.80	-0.23	-0.57	-0.23	-0.34	-6.50	264.01 SAR	1.61	0.00
STC	95.50	-0.52	-0.93	-0.52	-3.54	-6.19	192.01 SAR	3.05	18.05
AL-RAJHI BANK	63.40	-2.31	-3.65	-2.31	12.01	-3.06	162.25 SAR	3.12	16.82
NCB	36.75	-1.21	-2.13	-1.21	-1.34	-25.38	111.60 SAR	1.52	10.54
<b>United Arab Emirates</b>									
ETISALAT.AD	16.56	0.00	-2.01	0.00	0.36	1.22	144.02 AED	3.17	16.34
FAB.AD	11.46	0.00	0.35	0.00	1.96	-24.41	125.14 AED	1.28	11.95
EMIRATES NBD	10.90	0.93	-1.80	0.93	23.02	-16.15	68.85 AED	0.85	6.00
DB ISLAMIC BK	4.14	0.98	0.00	0.98	8.38	-24.86	29.98 AED	0.82	7.18
EMAAR PROPERT	2.87	-0.35	-2.05	-0.35	5.13	-28.61	20.55 AED	0.37	4.05
<b>Qatar</b>									
QNB	17.86	-0.78	-2.45	-0.78	2.99	-13.02	164.96 QAR	1.82	12.92
INDUSTRIES QAT	9.96	1.01	1.02	1.01	29.29	-3.21	60.26 QAR	1.87	37.28
QA ISLAMIC BK	16.00	0.00	-0.62	0.00	2.16	4.96	37.81 QAR	1.82	13.26
MASRAF AL RAYA	4.16	-0.22	-0.14	-0.22	9.40	5.53	31.21 QAR	2.35	14.32
MESAIEED PETRO	2.13	0.52	-0.14	0.52	5.50	-15.10	26.77 QAR	1.74	26.08
<b>OMAN</b>									
BANK MUSCAT	0.400	0.00	3.09	0.00	19.05	-3.23	1.30 OMR	0.67	8.16
OMANTEL	0.620	0.65	1.30	0.65	-2.50	1.30	0.47 OMR	0.88	6.79
BANK DHOFAR	0.111	0.00	0.00	0.00	5.71	-9.76	0.33 QAR	0.49	21.76
NAT BANK OF OMAN	0.178	0.00	-0.56	0.00	2.87	-2.72	0.29 QAR	0.55	7.52
OMINVEST	0.334	0.00	-0.60	0.00	-1.76	1.21	0.27 QAR	1.07	6.35



### Leading Sector Performance

#### Kuwait

The market are up today by +0.62 % The leading sector best performance indices today are Financial services 1.75 % Real estate 1.35 % Consumer goods 1.28 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 26.43 % while the bottom sector performance is Consumer services by -32.69 %

Telecommunication sector are down today by -0.14 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by +10.96 %

#### KSA

Saudi Armco are have negative performance today by -0.84 %, SABIC have negative performance today by -0.23 %

STC are have negative performance today by -0.52 %, Al Rajhi Bank have negative performance today by -2.31 %

#### UAE

ETISALAT AD are flat today, 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
19-Aug-20	16.56%	11.38%	0.07%	0.34%	0.33%	3.58%	3.34%	7.52%	3.43%	2.92%
26-Aug-20	16.56%	11.44%	0.07%	0.34%	0.33%	3.57%	3.36%	7.52%	3.42%	2.93%

#### End of Report

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