



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



## GCC DAILY MARKET WRAP

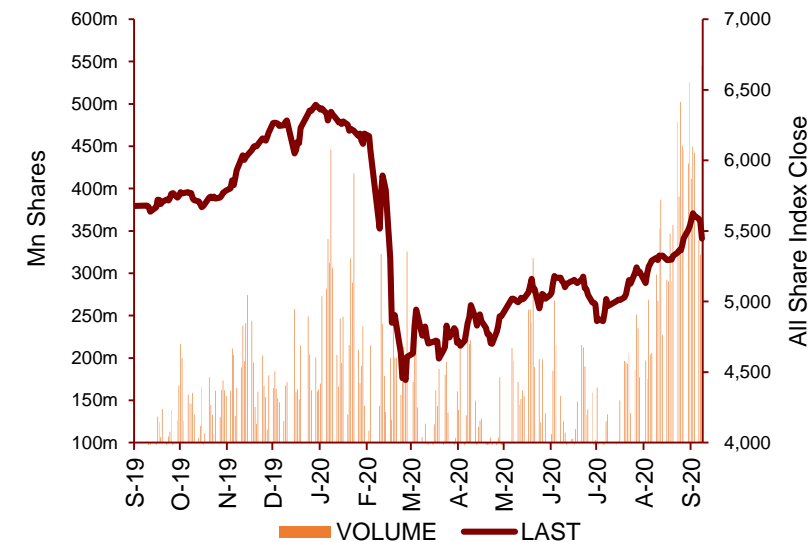
Monday, October 5, 2020



### Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>		%	%	%	%	%			
Kuwait All Share Index	5,597.57	0.06	2.80	2.80	2.80	-10.90	32.43 KWD	1.88	18.89
Kuwait Premier Index	6,212.33	0.11	3.18	3.18	3.18	-10.95	23.96 KWD	2.01	20.78
Kuwait Main Index	4,375.88	-0.08	1.68	1.68	1.68	-10.89	8.47 KWD	1.49	13.53
NIC 50	6,876.30	0.21	3.05	3.14	11.14	-7.80	27.54 KWD	1.48	14.96
<b>Kuwait Sector</b>									
Banking	1,311.88	-0.04	3.18	3.18	3.18	-11.52	19.42 KWD	2.10	20.35
Telecom	1,072.65	0.47	2.03	2.03	2.03	-3.94	3.29 KWD	1.92	12.97
Industrials	826.38	0.74	3.58	3.58	3.58	-10.90	2.95 KWD	1.34	21.21
Financial services	927.09	-0.27	2.30	2.30	2.30	-14.27	2.34 KWD	0.92	6.89
Real estate	970.54	0.39	2.76	2.76	2.76	-8.32	2.08 KWD	1.14	21.18
Basic materials	790.02	0.07	1.64	1.64	1.64	-13.00	0.70 KWD	1.23	19.01
Health care	820.13	0.00	0.00	0.00	0.00	-7.28	0.41 KWD	6.22	51.97
Consumer services	751.53	-0.79	1.46	1.46	1.46	-29.91	0.39 KWD	1.93	13.33
Insurance	1,020.81	-2.87	-2.61	-2.61	-2.61	7.02	0.38 KWD	0.90	8.39
Consumer goods	770.91	0.17	0.57	0.57	0.57	20.99	0.24 KWD	1.59	28.31
Oil and Gas	1,143.80	0.21	0.61	0.61	0.61	-7.62	0.24 KWD	1.68	10.61
Technology	506.34	-4.66	-1.14	-1.14	-1.14	-1.69	0.01 KWD	0.57	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>		%	%	%	%	%			
Saudi (TASI)	8,257.67	0.98	-0.45	-0.50	-0.50	-1.57	8,948 SAR	5.90	26.58
Qatar (QE Index)	9,956.66	0.03	-0.49	-0.34	-0.34	-4.50	532 QAR	1.70	98.77
Dubai (DFMGI)	2,224.68	-0.89	-1.81	-2.15	-2.15	-19.54	240 AED	20.58	10.65
Abu Dhabi (ADI)	4,487.74	-0.11	-0.10	-0.67	-0.67	-11.58	677 AED	4.62	15.30
Bahrain (BAX)	1,440.60	0.30	0.57	0.43	0.43	-10.53	16 BHD	1.63	13.11
MUSCAT SE INDEX	3,592.69	-0.07	-0.60	-0.60	-0.60	-9.75	4 OMR	0.74	10.85
<b>Developed Markets</b>									
MSCI World Index	2,362.41	-0.74	0.00	-0.21	-0.21	0.17			
U.S. (S&P 500)	3,348.44	-0.96	1.52	-0.43	-0.43	3.64			
U.K. (FTSE 100)	5,951.40	0.83	0.84	1.45	1.45	-21.09			
Japan (Topix)	1,637.25	1.74	1.74	0.72	0.72	-4.89			
<b>Emerging Markets</b>									
MSCI EM Index	1,081.71	-0.29	0.00	-0.03	-0.03	-2.96			
China (SSE Composite)	3,218.05	-0.20	-0.04	-5.23	7.82	5.51			
India (Sensex)	38,973.70	0.71	0.71	2.38	2.38	-5.53			



### What Move the GCC markets , Oil Prices

Oil prices rose on Monday, lifted by comments from doctors for U.S. President Donald Trump suggesting he could be discharged from hospital as soon as Monday, just a few days after his positive coronavirus test sparked widespread alarm.

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 was up \$1.47, or 3.7%, to \$40.74 a barrel.**

### Kuwait Market

The market are closed today up by +0.06%, re-opening the local economy , more liquidity expected in MSCI , also still with fear of the second wave Covid19 More than 1 million people have died of Covid-19 as of Tuesday, with fatalities and infections surging in several countries.

### Saudi Market

The Market closed today up by 0.98% , 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



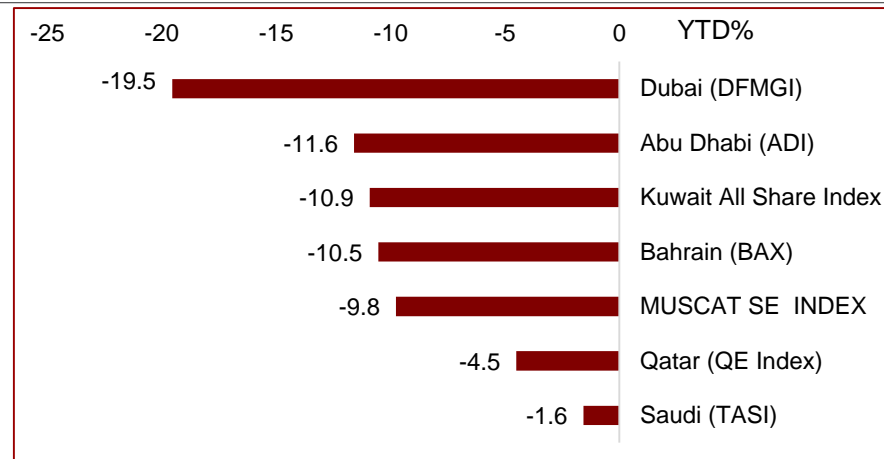
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Blue Chip Watch</b>		%	%	%	%	%			
<b>Kuwait</b>									
NBK	0.893	-0.22	2.64	2.64	2.64	-12.37	6.12 KWD	1.72	21.49
KFH	0.688	-0.15	4.08	4.08	4.08	-6.68	5.28 KWD	2.80	26.44
Zain	0.588	0.68	2.44	2.44	2.44	-2.00	2.54 KWD	2.07	12.43
BOUBYAN BANK	0.608	0.16	2.18	2.18	2.18	-0.41	1.84 KWD	3.22	36.56
Agility	0.680	0.59	3.50	3.50	3.50	-4.40	1.38 KWD	1.17	20.31
<b>Saudi Arabia</b>									
ARAMCO	35.85	2.14	0.28	-0.14	-0.14	1.70	7,020.19 SAR	6.84	29.46
SABIC	88.30	0.68	-0.23	-0.11	-0.11	-5.96	263.11 SAR	1.61	0.00
STC	102.40	1.99	1.59	1.99	1.99	0.59	200.81 SAR	3.19	18.83
AL-RAJHI BANK	65.70	1.08	-0.30	0.00	0.00	0.46	162.50 SAR	3.13	16.82
NCB	37.45	0.40	0.54	0.81	0.81	-23.96	111.90 SAR	1.53	10.44
<b>United Arab Emirates</b>									
ETISALAT.AD	16.70	0.36	0.48	0.24	0.24	2.08	144.71 AED	3.19	16.42
FAB.AD	11.12	-0.18	-0.18	-1.07	-1.07	-26.65	121.65 AED	1.25	11.61
EMIRATES NBD	10.40	-0.95	-0.95	-2.35	-2.35	-20.00	65.69 AED	0.81	5.83
DB ISLAMIC BK	4.21	-0.47	-2.55	-2.55	-2.55	-23.59	30.48 AED	0.83	7.40
EMAAR PROPERT	2.72	-1.81	-3.55	-2.51	-2.51	-32.34	19.47 AED	0.35	3.89
<b>Qatar</b>									
QNB	17.89	0.00	-0.67	-1.76	-1.76	-13.16	165.29 QAR	1.82	12.84
INDUSTRIES QAT	9.83	0.08	-1.06	-0.51	-0.51	-4.67	59.44 QAR	1.84	37.13
QA ISLAMIC BK	16.60	-0.95	-1.07	0.42	0.42	8.09	39.61 QAR	1.90	13.89
MASRAF AL RAYA	4.15	0.00	0.10	-0.24	-0.24	4.80	31.13 QAR	2.34	14.25
MESAIEED PETRO	2.10	0.77	0.43	0.96	0.96	-16.37	26.18 QAR	1.70	25.62
<b>OMAN</b>									
BANK MUSCAT	0.368	2.81	2.23	2.23	2.23	-11.45	1.15 OMR	0.59	7.27
OMANTEL	0.620	-0.64	-1.27	-1.27	-1.27	1.30	0.47 OMR	0.89	6.88
BANK DHOFAR	0.103	-1.90	-1.90	-1.90	-1.90	-16.26	0.31 QAR	0.46	20.59
NAT BANK OF OMAN	0.170	0.00	3.03	3.03	3.03	-7.61	0.28 QAR	0.52	7.14
OMINVEST	0.332	0.00	0.61	0.61	0.61	0.61	0.27 QAR	1.07	6.31

### Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
23-Sep-20	16.80%	11.97%	0.07%	0.27%	0.31%	3.77%	3.55%	7.85%	3.55%	2.94%
30-Sep-20	16.84%	12.11%	0.07%	0.18%	0.31%	3.64%	3.60%	7.93%	3.65%	2.94%

### End of Report

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document is confidential and may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed and others authorized to receive it.



### Leading Sector Performance

The market are up today by +0.06 % The leading sector best performance indices today are Industrials 0.74 % Telecom 0.47 % Real estate 0.39 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 20.99 % while the bottom sector performance is Consumer services by -29.91 %.

Telecommunication sector are up today by +0.47 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by +6.96 %.

### KSA

Saudi Armco are have positive performance today by +2.14 %, SABIC have positive performance today by +0.68 %.

STC are have positive performance today by +1.99 %, Al Rajhi Bank have positive performance today by +1.08 %.

### UAE

ETISALAT AD are up by +0.36 , still outperform the market performance in year to date basis and act defensively with COVID19



شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | [www.nic.com.kw](http://www.nic.com.kw)