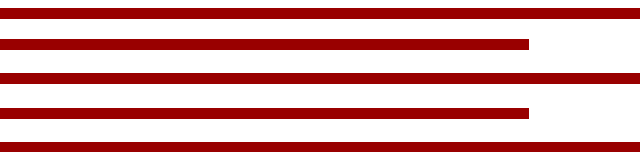


شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



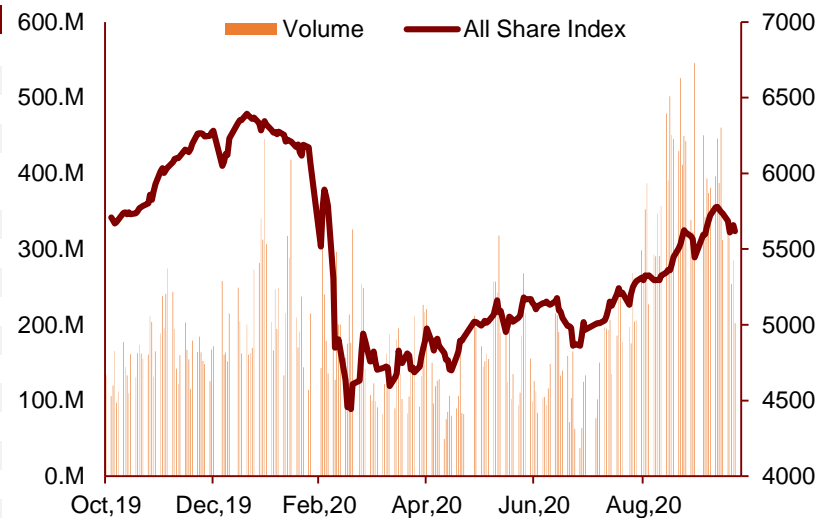
## GCC DAILY MARKET WRAP

Sunday, October 25, 2020



### Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>		%	%	%	%	%			
Kuwait All Share Index	5,562.64	-0.99	-3.01	2.16	2.16	-11.46	32.77 KWD	1.91	18.89
Kuwait Permier Index	6,157.79	-1.17	-3.44	2.27	2.27	-11.73	24.24 KWD	2.04	20.76
Kuwait Main Index	4,381.50	-0.46	-0.46	1.81	1.81	-10.78	8.53 KWD	1.53	13.56
NIC 50	6,823.46	-1.11	-3.49	2.20	2.20	-8.51	28.60 KWD	1.57	15.56
<b>Kuwait Sector</b>									
Banking	1,296.00	-1.10	-1.10	1.93	1.93	-12.59	19.58 KWD	2.14	20.39
Telecom	1,098.75	-1.16	-1.16	4.51	4.51	-1.61	3.41 KWD	1.99	13.52
Industrials	830.04	-0.78	-0.78	4.04	4.04	-10.51	2.99 KWD	1.41	21.18
Financial services	939.17	-0.84	-0.84	3.63	3.63	-13.16	2.41 KWD	0.94	7.01
Real estate	918.03	-0.90	-0.90	-2.80	-2.80	-13.28	2.00 KWD	1.05	20.30
Basic materials	812.82	-1.18	-1.18	4.58	4.58	-10.49	0.73 KWD	1.22	19.08
Health care	821.04	0.00	0.00	0.11	0.11	-7.18	0.41 KWD	6.22	52.00
Consumer services	743.41	-0.38	-0.38	0.36	0.36	-30.67	0.39 KWD	1.83	13.94
Insurance	1,014.18	0.78	0.78	-3.24	-3.24	6.32	0.37 KWD	0.87	8.07
Consumer goods	762.51	-0.67	-0.67	-0.52	-0.52	19.67	0.24 KWD	1.58	28.19
Oil and Gas	1,172.12	-0.46	-0.46	3.11	3.11	-5.34	0.25 KWD	1.76	10.88
Technology	509.25	0.00	0.00	-0.57	-0.57	-1.13	0.01 KWD	0.58	0.00



### What Move the GCC markets ,

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>		%	%	%	%	%			
Saudi (TASI)	8,154.59	-4.12	-4.12	-1.74	-1.74	-2.80	9,104 SAR	5.92	26.12
Qatar (QE Index)	9,808.34	-1.51	-2.06	-1.97	-1.97	-6.07	539 QAR	1.69	12.50
Dubai (DFMGI)	2,177.46	-0.37	-0.78	-4.22	-4.22	-21.25	235 AED	1.25	11.07
Abu Dhabi (ADI)	4,568.08	0.25	0.30	1.11	1.11	-10.00	680 AED	4.61	15.59
Bahrain (BAX)	1,435.20	-0.85	-2.88	0.05	0.05	-10.87	16 BHD	1.73	13.23
MUSCAT SE INDEX	3,564.11	0.19	-0.82	-1.40	-1.40	-10.48	4 OMR	0.75	11.36
<b>Developed Markets</b>									
MSCI World Index	2,430.54	0.39	-0.39	2.67	2.67	3.06			
U.S. (S&P 500)	3,465.39	0.34	-0.53	3.04	3.04	7.26			
U.K. (FTSE 100)	5,860.28	1.29	-1.00	-0.10	-0.10	-22.30			
Japan (Topix)	1,625.32	0.34	0.47	-0.01	-0.01	-5.58			
<b>Emerging Markets</b>									
MSCI EM Index	1,136.45	-0.01	1.10	5.03	5.03	1.95			
China (SSE Composite)	3,278.00	-1.04	-1.75	1.86	1.86	7.47			
India (Sensex)	40,685.50	0.31	1.76	6.88	6.88	-1.38			

### Oil Prices

Oil fell nearly 2% on Sunday and headed for a weekly drop as demand concerns raised by surging coronavirus cases in the United States and Europe overshadowed the prospect of an extension to OPEC-led supply curbs. **Brent crude lost 69 cents, or 1.63%, to settle at \$41.77 a barrel.**

### Kuwait Market

The market are closed today down by -0.99%, with slow of re-opening the global economy , MSCI liquidity expectation, while Coronavirus concerns continue to weigh on sentiment too as infections surge in the region. Coronavirus restrictions are returning across Europe, increased uncertainty over the outlook for economic growth.

### Saudi Market

The Market closed today down by -4.12% and turn negative YTD performance again, today market are linked to the slow economic recovery over the globe and fear form the Covid19 second wave and oil prices over \$41 a barrel.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



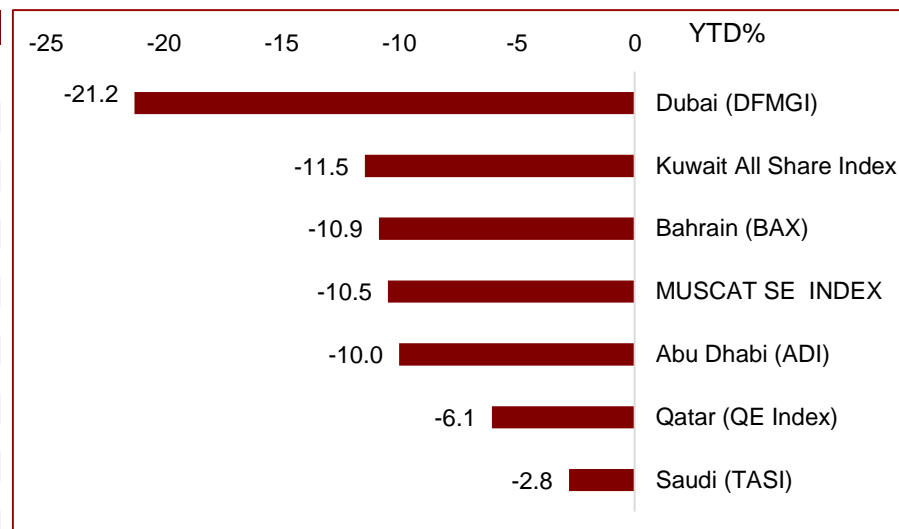
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	0.870	-0.80	-2.25	0.00	0.00	-14.63	6.06 KWD	1.71	21.06
KFH	0.679	-1.45	-4.10	2.72	2.72	-7.90	5.34 KWD	2.84	26.44
Zain	0.602	-1.47	-2.27	4.88	4.88	0.33	2.64 KWD	2.15	13.00
BOUBYAN BANK	0.613	-1.45	-3.77	3.03	3.03	0.41	1.89 KWD	3.31	37.47
Agility	0.676	-0.44	-2.73	2.89	2.89	-4.96	1.38 KWD	1.17	20.40
<b>Saudi Arabia</b>									
ARAMCO	34.50	-2.27	-3.63	-3.90	-3.90	-2.13	7,060.00 SAR	6.88	29.09
SABIC	93.20	-4.51	-3.02	5.43	5.43	-0.75	291.30 SAR	1.78	0.00
STC	103.00	-2.83	-0.96	2.59	2.59	1.18	206.40 SAR	3.28	19.26
AL-RAJHI BANK	66.20	-1.19	-1.05	0.76	0.76	1.22	166.25 SAR	3.20	16.97
NCB	39.60	-1.61	-4.81	6.59	6.59	-19.59	119.85 SAR	1.63	11.20
<b>United Arab Emirates</b>									
ETISALAT.AD	16.90	-1.05	0.12	1.56	1.56	3.42	147.67 AED	3.25	16.61
FAB.AD	11.26	0.54	0.18	0.00	0.00	-25.86	122.09 AED	1.25	11.68
EMIRATES NBD	9.70	0.00	-3.48	-8.92	-8.92	-25.38	59.38 AED	0.72	8.25
DB ISLAMIC BK	4.10	-0.24	-1.20	-5.09	-5.09	-25.59	29.76 AED	0.80	7.85
EMAAR PROPERT	2.59	-0.77	-1.52	-7.17	-7.17	-35.57	18.76 AED	0.34	3.67
<b>Qatar</b>									
QNB	17.68	-0.67	-1.23	-2.86	-2.86	-14.13	163.42 QAR	1.76	13.84
INDUSTRIES QAT	9.58	-1.16	-3.67	-3.77	-3.77	-7.79	58.06 QAR	1.80	37.27
QA ISLAMIC BK	16.40	-0.85	-0.42	-0.61	-0.61	6.98	39.00 QAR	1.80	13.71
MASRAF AL RAYA	4.28	1.45	2.42	2.79	2.79	7.98	31.49 QAR	2.27	14.47
MESAIEED PETRO	1.92	-7.10	-8.69	-7.98	-7.98	-23.78	26.00 QAR	1.69	25.88
<b>OMAN</b>									
BANK MUSCAT	0.360	0.00	-3.23	0.56	0.56	-12.90	1.18 OMR	0.61	7.35
OMANTEL	0.624	0.00	0.65	-1.27	-1.27	1.30	0.47 OMR	0.88	6.83
BANK DHOFAR	0.107	0.00	0.00	1.90	1.90	-13.01	0.32 QAR	0.47	20.98
NAT BANK OF OMAN	0.160	0.00	-5.33	-3.03	-3.03	-13.04	0.27 QAR	0.51	6.72
OMINVEST	0.322	0.00	0.00	-2.42	-2.42	-2.42	0.26 QAR	1.03	6.12

### Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
14-Oct-20	16.93%	12.38%	0.06%	0.12%	0.31%	3.59%	3.73%	8.14%	3.80%	2.96%
21-Oct-20	16.73%	12.48%	0.06%	0.14%	0.31%	3.73%	3.71%	8.16%	4.00%	2.95%

### End of Report

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### Leading Sector Performance

The market are down today by -0.99 % The leading sector bottom performance indices today are Basic materials -1.18 % Telecom -1.16 % Banking -1.1 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 19.67 % while the bottom sector performance is Consumer services by -30.67 %.

Telecommunication sector are down today by -1.16 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 9.81 %.

### KSA

Saudi Armco are have negative performance today by -2.27 %, SABIC have negative performance today by -4.51 %.

STC are have negative performance today by -2.83 %, Al Rajhi Bank have negative performance today by -1.19 %

### UAE

ETISALAT AD down by -1.05%, still outperform the market performance in year to date basis and act defensively with COVID19



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