



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

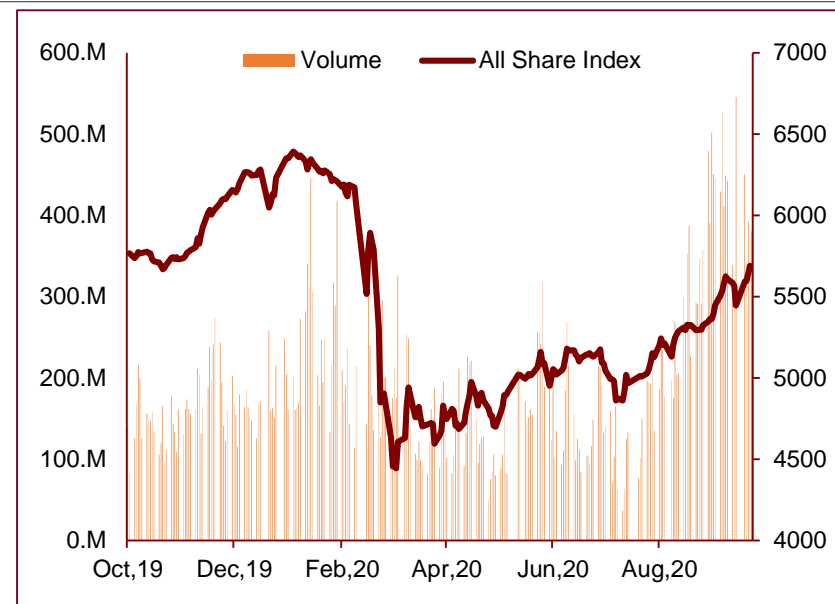
Thursday, October 8, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,724.75	0.62	5.13	5.13	5.13	-8.88	33.18 KWD	1.92	19.14
Kuwait Premier Index	6,372.82	0.75	5.85	5.85	5.85	-8.65	24.60 KWD	2.06	21.08
Kuwait Main Index	4,434.87	0.22	3.05	3.05	3.05	-9.69	8.58 KWD	1.53	13.56
NIC 50	7,031.00	0.63	5.80	5.77	5.78	-5.73	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,343.96	0.74	5.70	5.70	5.70	-9.35	19.90 KWD	2.16	20.61
Telecom	1,114.34	1.01	6.00	6.00	6.00	-0.21	3.42 KWD	2.00	13.40
Industrials	848.34	0.65	6.34	6.34	6.34	-8.54	3.03 KWD	1.36	21.67
Financial services	937.88	0.21	3.49	3.49	3.49	-13.28	2.36 KWD	0.92	6.98
Real estate	979.44	-0.01	3.70	3.70	3.70	-7.48	2.10 KWD	1.14	21.22
Basic materials	817.96	0.55	5.24	5.24	5.24	-9.93	0.73 KWD	1.23	19.28
Health care	820.13	0.00	0.00	0.00	0.00	-7.28	0.41 KWD	6.22	51.97
Consumer services	753.61	0.02	1.74	1.74	1.74	-29.72	0.39 KWD	1.90	13.51
Insurance	1,002.94	-0.18	-4.31	-4.31	-4.31	5.14	0.37 KWD	0.88	8.07
Consumer goods	763.59	-0.76	-0.38	-0.38	-0.38	19.84	0.23 KWD	1.56	28.22
Oil and Gas	1,157.89	0.07	1.85	1.85	1.85	-6.49	0.24 KWD	1.67	10.51
Technology	523.80	2.86	2.27	2.27	2.27	1.69	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)	8,412.55	0.64	1.42	1.37	1.37	0.28	9,129 SAR	6.02	26.71
Qatar (QE Index)	10,032.13	1.00	0.26	0.42	0.42	-3.77	541 QAR	1.73	107.18
Dubai (DFMGI)	2,214.32	0.07	-2.27	-2.60	-2.60	-19.91	239 AED	20.59	10.55
Abu Dhabi (ADI)	4,512.51	0.40	0.46	-0.12	-0.12	-11.10	676 AED	4.59	15.51
Bahrain (BAX)	1,458.42	0.62	1.81	1.67	1.67	-9.43	16 BHD	1.75	13.26
MUSCAT SE INDEX	3,604.21	-0.11	-0.29	-0.29	-0.29	-9.47	4 OMR	0.75	10.88
Developed Markets									
MSCI World Index	2,409.39	1.13	1.99	1.78	1.78	2.16			
U.S. (S&P 500)	3,419.45	0.00	2.12	1.68	1.68	5.84			
U.K. (FTSE 100)	5,982.46	0.61	1.36	1.98	1.98	-20.68			
Japan (Topix)	1,655.47	0.55	2.87	1.84	1.84	-3.83			
Emerging Markets									
MSCI EM Index	1,107.90	0.49	2.42	2.39	2.39	-0.61			
China (SSE Composite)	3,218.05	-0.20	-0.04	-5.23	7.82	5.51			
India (Sensex)	40,182.67	0.76	3.84	5.56	5.56	-2.60			



What Move the GCC markets , Oil Prices

Oil prices inched up on Thursday as oil workers evacuated rigs in the U.S. Gulf of Mexico ahead of Hurricane Delta, though fuel demand concerns persisted on fading chances for a U.S. economic stimulus deal and a build in U.S. crude inventories. **Brent crude futures rose 9 cents, or 0.2%, to \$42.08 a barrel, after falling 1.6% on Wednesday.**

Kuwait Market

The market are closed today up by +0.62%, re-opining 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 +0.64% , linked to the slow economic recovery over the globe and re-opening the global economy and oil prices over \$42 a barrel.



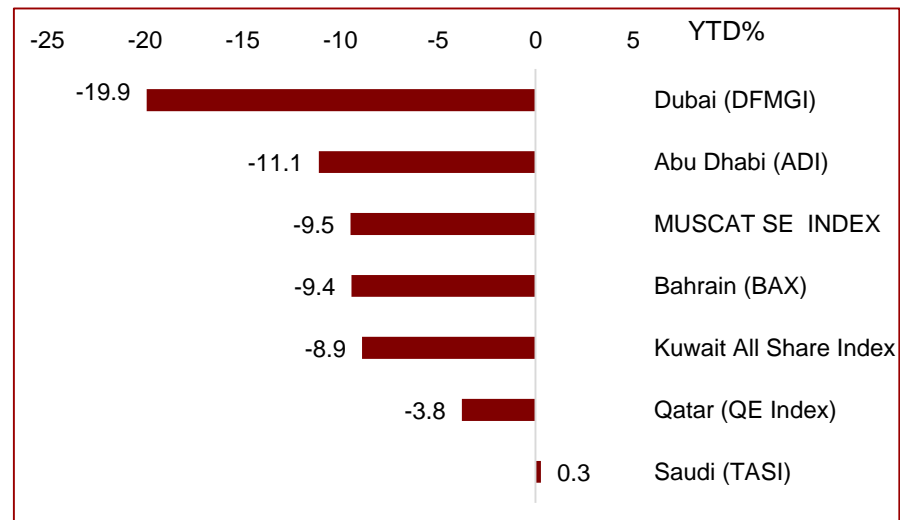
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.904	0.67	3.91	3.91	3.91	-11.29	6.19 KWD	1.75	21.56
KFH	0.706	1.00	6.81	6.81	6.81	-4.24	5.42 KWD	2.88	26.82
Zain	0.614	0.99	6.97	6.97	6.97	2.33	2.66 KWD	2.16	12.94
BOUBYAN BANK	0.619	0.65	4.03	4.03	4.03	1.40	1.87 KWD	3.28	37.05
Agility	0.705	0.71	7.31	7.31	7.31	-0.89	1.43 KWD	1.21	21.03
Saudi Arabia									
ARAMCO	36.00	0.56	0.70	0.28	0.28	2.13	7,160.19 SAR	6.98	29.54
SABIC	91.90	3.49	3.84	3.96	3.96	-2.13	266.41 SAR	1.63	0.00
STC	104.00	0.19	3.17	3.59	3.59	2.16	207.61 SAR	3.30	19.43
AL-RAJHI BANK	66.40	-0.60	0.76	1.07	1.07	1.53	167.00 SAR	3.22	17.04
NCB	38.50	1.32	3.36	3.63	3.63	-21.83	114.00 SAR	1.55	10.65
United Arab Emirates									
ETISALAT.AD	16.90	0.24	1.44	1.20	1.20	3.06	146.98 AED	3.24	16.63
FAB.AD	11.16	0.54	-0.54	-1.42	-1.42	-26.91	121.87 AED	1.25	11.57
EMIRATES NBD	10.50	-0.47	0.00	-1.41	-1.41	-19.23	66.32 AED	0.81	5.86
DB ISLAMIC BK	4.23	1.20	-2.08	-2.08	-2.08	-23.23	30.63 AED	0.84	7.32
EMAAR PROPERT	2.65	0.00	-6.03	-5.02	-5.02	-34.08	18.97 AED	0.34	3.72
Qatar									
QNB	18.17	1.23	-0.28	-1.37	-1.37	-12.82	167.83 QAR	1.85	12.88
INDUSTRIES QAT	9.94	3.43	-0.66	-0.10	-0.10	-4.28	60.14 QAR	1.86	36.33
QA ISLAMIC BK	16.65	0.42	-1.13	0.36	0.36	8.02	39.34 QAR	1.89	13.74
MASRAF AL RAYA	4.20	0.53	1.13	0.79	0.79	5.88	31.49 QAR	2.37	14.34
MESAIEED PETRO	2.11	0.67	0.29	0.82	0.82	-16.49	26.56 QAR	1.73	25.83
OMAN									
BANK MUSCAT	0.366	-0.54	2.23	2.23	2.23	-11.45	1.19 OMR	0.61	7.51
OMANTEL	0.628	0.00	0.00	0.00	0.00	2.60	0.47 OMR	0.89	6.92
BANK DHOFAR	0.103	0.00	-1.90	-1.90	-1.90	-16.26	0.31 QAR	0.45	20.20
NAT BANK OF OMAN	0.169	0.00	2.42	2.42	2.42	-8.15	0.27 QAR	0.52	7.10
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
30-Sep-20	16.84%	12.11%	0.07%	0.18%	0.31%	3.64%	3.60%	7.93%	3.65%	2.94%
7-Oct-20	16.89%	12.21%	0.06%	0.19%	0.31%	3.62%	3.64%	8.01%	3.70%	2.96%

End of Report

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Leading Sector Performance

The market are up today by +0.62 % The leading sector best performance indices today are Technology 2.86 % Telecom 1.01 % Banking 0.74 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 19.84 % while the bottom sector performance is Consumer services by -29.72 %

Telecommunication sector are up today by +1.01 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by +8.67 %.

KSA

Saudi Armco are have positive performance today by +0.56 %, SABIC have positive performance today by +3.49 %.

STC are have positive performance today by +0.19 %, Al Rajhi Bank have negative performance today by -0.6 %.

UAE

ETISALAT AD up by +1.44% , still outperform the market performance in year to date basis and act defensively with COVID19



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