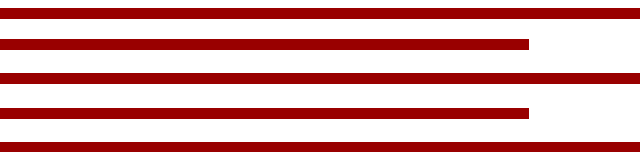


شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



## GCC DAILY MARKET WRAP

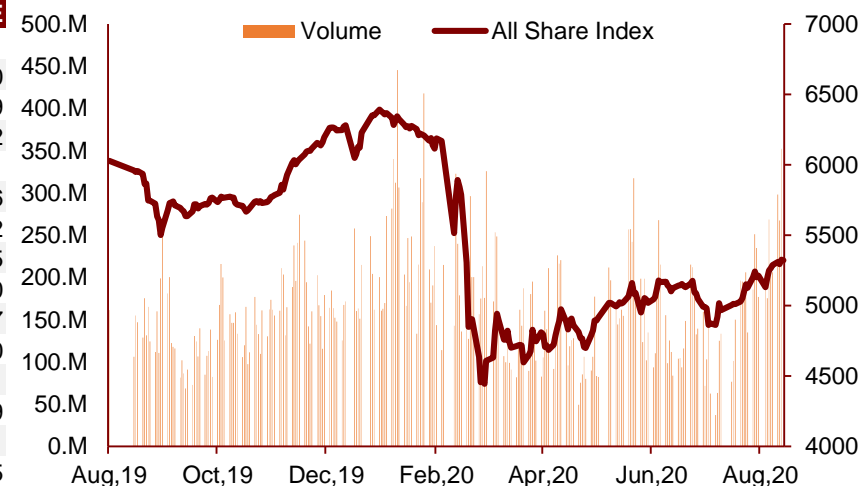
Wednesday, September 2, 2020



### Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>									
		%	%	%	%	%			
Kuwait All Share Index	5,321.53	-0.10	0.61	0.51	3.72	-15.30	30.81 KWD	1.76	18.30
Kuwait Premier Index	5,874.29	-0.25	0.36	0.34	4.77	-15.79	22.66 KWD	1.90	19.69
Kuwait Main Index	4,227.69	0.33	1.33	1.02	0.90	-13.91	8.15 KWD	1.38	14.42
<b>Kuwait Sector</b>									
Banking	1,238.82	-0.10	0.74	0.50	6.78	-16.44	18.32 KWD	1.94	19.26
Telecom	1,056.73	-1.17	-1.57	-1.31	1.98	-5.37	3.24 KWD	1.90	12.92
Industrials	774.05	0.42	1.19	1.06	-2.79	-16.55	2.77 KWD	1.26	20.25
Financial services	895.72	0.56	3.00	2.32	3.20	-17.18	2.27 KWD	0.94	7.80
Real estate	886.59	0.14	0.59	1.49	-0.75	-16.25	1.91 KWD	1.00	22.97
Basic materials	783.87	0.00	0.47	0.42	-4.12	-13.68	0.70 KWD	1.15	18.80
Health care	829.21	0.00	0.00	0.00	1.00	-6.26	0.41 KWD	6.19	52.21
Consumer services	712.93	-1.22	-0.79	-0.50	-8.33	-33.51	0.37 KWD	1.86	12.49
Insurance	978.43	1.40	1.76	1.06	2.42	2.57	0.36 KWD	0.85	7.71
Consumer goods	803.17	-0.30	-0.55	0.98	9.08	26.05	0.25 KWD	1.67	29.75
Oil and Gas	1,076.54	0.17	-2.27	-1.81	-1.34	-13.06	0.22 KWD	1.47	9.80
Technology	493.24	4.47	-0.30	-0.73	-0.30	-4.24	0.01 KWD	0.55	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>									
		%	%	%	%	%			
Saudi (TASI)	8,013.44	1.45	1.00	0.92	10.93	-4.48	8,908 SAR	5.93	26.38
Qatar (QE Index)	9,811.57	-0.40	-0.84	-0.46	8.91	-6.00	517 QAR	1.69	63.95
Dubai (DFMGI)	2,259.60	0.32	-0.43	0.64	9.41	-18.27	244 AED	37.56	10.70
Abu Dhabi (ADI)	4,547.13	0.48	0.26	0.62	6.10	-10.42	680 AED	4.46	14.88
Bahrain (BAX)	1,398.25	-0.52	1.26	1.26	9.44	-13.16	15 BHD	1.39	13.68
MUSCAT SE INDEX	3,769.09	-0.30	0.85	-0.07	7.20	-5.33	4 OMR	0.77	11.40
<b>Developed Markets</b>									
MSCI World Index	2,467.25	0.48	0.42	0.48	12.06	4.61			
U.S. (S&P 500)	3,526.65	0.75	0.53	0.75	13.75	9.16			
U.K. (FTSE 100)	5,957.54	1.63	-0.10	-0.10	-3.44	-21.01			
Japan (Topix)	1,623.40	0.47	1.15	0.32	4.15	-5.69			
<b>Emerging Markets</b>									
MSCI EM Index	1,120.02	1.68	-0.14	1.68	12.55	0.48			
China (SSE Composite)	3,404.80	-0.17	0.03	0.27	14.08	11.63			
India (Sensex)	39,086.03	0.48	-0.96	1.19	11.95	-5.25			



### What Move the GCC markets , Oil Prices

Crude oil futures extended gains on Wednesday after a bigger-than-expected draw in U.S. crude stockpiles and as solid U.S. and Chinese factory activity fueled optimism of a recovery from the pandemic, boosting investor risk appetite.

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 rose 28 cents, or 0.6%, to \$45.86 extending gains into a third day.**

### Kuwait Market

The market are closed today down by -0.10% , 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

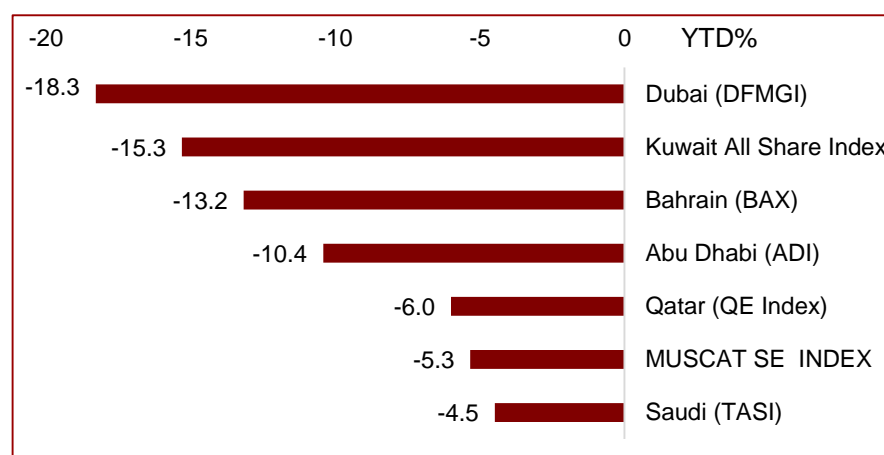
The Market closed up today by +1.45% , also closed August 2020up by +6.5% linked to the effect of the re-opining the local economy also the oil performance above 45\$ with the production cuts.

# 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	0.866	0.12	0.00	0.70	5.48	-15.02	5.93 KWD	1.67	20.77
KFH	0.630	-0.16	0.64	0.64	2.94	-14.55	4.83 KWD	2.57	24.21
Zain	0.580	-1.69	-2.03	-1.69	4.50	-3.33	2.51 KWD	2.04	12.55
BOUBYAN BANK	0.583	0.00	2.28	0.87	9.59	-4.50	1.77 KWD	3.09	35.12
Agility	0.626	-0.16	0.16	0.32	-1.92	-11.99	1.27 KWD	1.08	18.83
<b>Saudi Arabia</b>									
ARAMCO	36.00	2.13	2.86	1.27	10.77	2.13	7,049.81 SAR	6.87	29.30
SABIC	89.40	1.82	1.25	1.59	1.48	-4.79	263.39 SAR	1.61	0.00
STC	97.70	2.30	1.35	1.77	-1.31	-4.03	190.99 SAR	3.04	17.94
AL-RAJHI BANK	64.50	1.74	-1.98	-0.62	13.96	-1.38	158.50 SAR	3.05	16.56
NCB	37.10	0.95	-1.20	-0.27	-0.40	-24.67	110.25 SAR	1.50	10.43
<b>United Arab Emirates</b>									
ETISALAT.AD	16.70	0.85	-1.42	0.60	0.97	1.83	145.24 AED	3.20	16.34
FAB.AD	11.52	0.52	1.05	0.70	2.67	-23.88	125.80 AED	1.29	11.95
EMIRATES NBD	10.90	0.00	-1.80	0.93	23.02	-16.15	68.85 AED	0.85	6.06
DB ISLAMIC BK	4.15	0.24	0.24	1.22	8.64	-24.68	30.05 AED	0.82	7.25
EMAAR PROPERT	2.91	1.39	-0.68	1.04	6.59	-27.61	20.83 AED	0.37	4.03
<b>Qatar</b>									
QNB	17.89	0.17	-2.61	-0.67	2.82	-13.16	165.24 QAR	1.82	12.81
INDUSTRIES QAT	10.10	1.41	1.83	1.72	30.33	-2.43	61.11 QAR	1.89	37.66
QA ISLAMIC BK	15.90	-0.63	-1.67	-0.50	1.08	3.85	37.57 QAR	1.81	13.26
MASRAF AL RAYA	4.15	-0.38	-1.31	-0.96	8.12	4.29	31.09 QAR	2.34	14.29
MESAIIEED PETRO	2.13	-0.19	-0.61	0.05	5.00	-15.50	26.72 QAR	1.74	26.21
<b>OMAN</b>									
BANK MUSCAT	0.400	0.00	3.09	0.50	19.05	-3.23	1.30 OMR	0.67	8.16
OMANTEL	0.624	0.00	1.30	-0.64	-2.50	1.30	0.47 OMR	0.88	6.83
BANK DHOFAR	0.112	0.90	0.90	0.90	6.67	-8.94	0.34 QAR	0.49	21.76
NAT BANK OF OMAN	0.179	0.00	-0.56	0.56	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 down today by -0.1 % The leading sector bottom performance indices today are Consumer services -1.22 % Telecom -1.17 % Consumer goods -0.3 % respectively

from YTD performance perspective the best sector performance are Consumer goods by 26.05 % while the bottom sector performance is Consumer services by -33.51 %

Telecommunication sector are down today by -1.17 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 9.93 %

#### KSA

Saudi Armco are have positive performance today by + 2.13 %, SABIC have positive performance today by + 1.82 %

STC are have positive performance today by + 2.3 %, Al Rajhi Bank have positive performance today by + 1.74 %

#### 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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