



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

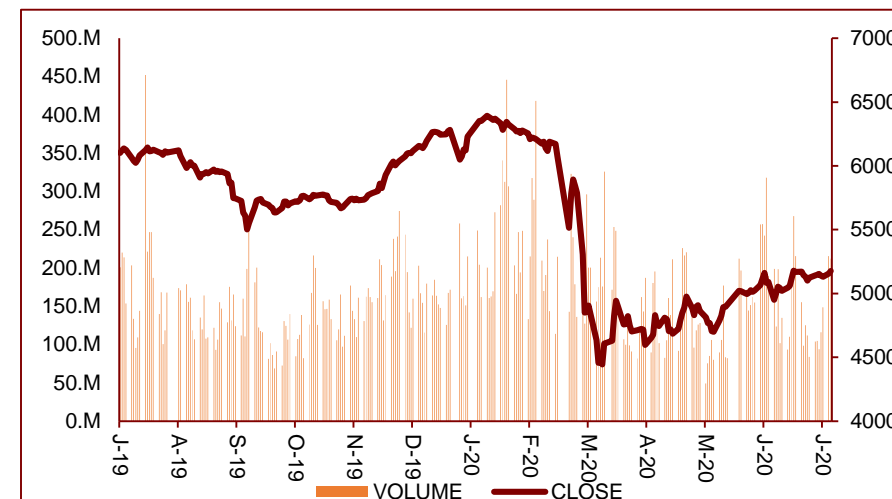
Wednesday, July 15, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,087.66	-0.13	-0.85	-0.84	-0.84	-19.02	29.52 KWD	1.50	15.13
Kuwait Premier Index	5,553.61	0.02	-0.90	-0.95	-0.95	-20.39	21.44 KWD	1.60	15.13
Kuwait Main Index	4,167.77	-0.52	-0.72	-0.53	-0.53	-15.13	8.08 KWD	1.26	15.12
Kuwait Sector									
Banking	1,151.60	0.19	-0.22	-0.74	-0.74	-22.33	17.08 KWD	1.55	15.55
Telecom	1,026.81	-0.44	-2.63	-0.91	-0.91	-8.05	3.16 KWD	1.72	10.93
Industrials	791.46	-1.86	-2.70	-0.60	-0.60	-14.67	2.88 KWD	1.36	16.88
Financial services	850.67	0.27	-0.18	-1.99	-1.99	-21.34	2.15 KWD	0.81	11.95
Real estate	873.35	-0.97	-2.08	-2.23	-2.23	-17.50	1.90 KWD	0.94	12.57
Basic materials	847.03	0.65	1.41	3.61	3.61	-6.72	0.75 KWD	1.20	18.40
Health care	839.19	0.00	0.00	2.21	2.21	-5.13	0.42 KWD	6.38	47.76
Consumer services	759.75	-0.33	-1.19	-2.31	-2.31	-29.14	0.39 KWD	1.47	9.00
Insurance	938.34	0.01	-2.88	-1.78	-1.78	-1.63	0.35 KWD	0.78	8.08
Consumer goods	710.66	2.41	-1.35	-3.49	-3.49	11.53	0.21 KWD	1.47	30.17
Oil and Gas	1,092.60	-0.32	-0.85	0.13	0.13	-11.76	0.23 KWD	1.63	9.13
Technology	465.60	4.23	-5.88	-5.88	-5.88	-9.60	0.01 KWD	0.48	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	7,418.04	0.51	0.02	2.68	2.68	-11.58	8,432 SAR	5.40	29.17
Qatar (QE Index)	9,394.59	0.81	0.84	4.40	4.40	-9.89	494 QAR	1.67	30.36
Dubai (DFMGI)	2,048.20	-0.22	-1.63	-0.83	-0.83	-25.92	221 AED	0.95	7.97
Abu Dhabi (ADI)	4,221.11	-1.56	-1.73	-1.51	-1.51	-16.84	598 AED	3.99	17.97
Bahrain (BAX)	1,304.29	-0.25	1.40	2.09	2.09	-19.00	14 BHD	1.00	16.43
MUSCAT SE INDEX	3,461.36	-1.22	-0.93	-1.55	-1.55	-13.06	4 OMR	0.74	9.28
Developed Markets									
MSCI World Index	2,270.69	0.75	0.49	3.13	3.13	-3.72			
U.S. (S&P 500)	3,229.94	1.01	1.41	4.18	4.18	-0.03			
U.K. (FTSE 100)	6,287.56	1.74	3.15	1.91	1.91	-16.64			
Japan (Topix)	1,589.51	1.56	3.54	1.97	1.97	-7.66			
Emerging Markets									
MSCI EM Index	1,059.52	-1.11	-0.91	6.47	6.47	-4.95			
China (SSE Composite)	3,361.30	-1.56	-0.65	12.62	12.62	10.20			
India (Sensex)	36,051.81	0.05	-1.48	3.25	3.25	-12.61			



What Move the GCC markets ,

Oil Prices

Oil prices rose on Wednesday after a sharp drop in U.S. crude inventories, with the market waiting for more direction from a meeting later in the day on the future level of production by OPEC and its allies

In a sign of improving demand despite the coronavirus pandemic, U.S. crude inventories fell by 8.3 million barrels in the week to July 10, beating analysts' expectations for a decline of 2.1 million barrels

Brent crude futures were up 56 cents, or 1.3%, at \$43.46 a barrel

Kuwait Market

The market are closed today down by -0.13%, linked by uncertainty of the closer disclosures of companies semiannual financial results and fear of the second wave coronavirus effect of the global economy. *Value traded over 30 Million KD.*

Saudi Market

The Market closed up today by +0.51% , linked to the effect of the re-opening the local economy also the oil performance above 43\$ with the production cuts.



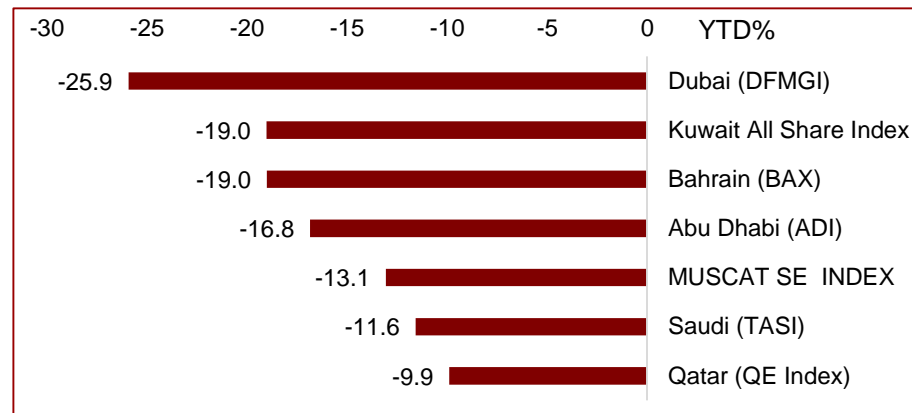
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.806	0.12	-0.49	-1.83	-1.83	-20.91	5.51 KWD	1.41	14.12
KFH	0.595	0.34	-1.33	-2.78	-2.78	-19.30	4.55 KWD	1.99	18.24
Zain	0.551	0.00	-2.82	-0.72	-0.72	-8.17	2.38 KWD	1.84	10.99
BOUBYAN BANK	0.533	-0.37	-0.56	0.19	0.19	-12.69	1.62 KWD	2.49	27.21
Agility	0.748	-2.22	-2.48	1.91	1.91	-8.56	1.35 KWD	1.16	15.13
Saudi Arabia									
ARAMCO	33.45	0.30	0.45	2.92	2.92	-5.11	6,670.18 SAR	6.23	21.41
SABIC	88.40	0.11	-0.34	0.34	0.34	-5.86	264.91 SAR	1.59	219.35
STC	96.70	-0.21	-1.33	-2.32	-2.32	-5.01	193.81 SAR	3.08	17.92
AL-RAJHI BANK	57.30	0.35	-0.69	1.24	1.24	-12.39	142.75 SAR	2.88	14.46
NCB	36.05	0.42	-2.83	-3.22	-3.22	-26.80	107.70 SAR	1.68	9.62
United Arab Emirates									
ETISALAT.AD	16.64	-0.83	-0.48	0.85	0.85	1.71	145.93 AED	3.23	16.85
FAB.AD	10.60	-3.46	-3.99	-5.69	-5.69	-30.08	119.90 AED	1.28	10.62
EMIRATES NBD	8.50	-1.39	-4.39	-4.06	-4.06	-34.62	54.45 AED	0.69	3.76
DB ISLAMIC BK	3.88	0.00	0.52	1.57	1.57	-29.58	28.09 AED	0.79	5.97
EMAAR PROPERT	2.59	-1.15	-5.82	-5.13	-5.13	-35.57	18.76 AED	0.35	3.03
Qatar									
QNB	18.25	1.11	0.55	4.95	4.95	-11.36	166.79 QAR	1.90	11.82
INDUSTRIES QAT	8.20	2.51	0.02	6.56	6.56	-20.22	48.42 QAR	1.51	23.00
QA ISLAMIC BK	15.96	0.69	-0.37	1.33	1.33	4.11	37.47 QAR	1.85	13.13
MASRAF AL RAYA	3.91	0.03	-0.64	2.33	2.33	-1.29	29.33 QAR	2.30	13.45
MESAIIEED PETRO	2.19	3.16	4.79	8.27	8.27	-12.87	26.64 QAR	1.85	27.53
OMAN									
BANK MUSCAT	0.338	0.00	0.00	0.00	0.00	-18.71	1.09 OMR	0.57	6.39
OMANTEL	0.620	-1.27	-1.27	-3.12	-3.12	0.65	0.47 OMR	0.83	6.06
BANK DHOFAR	0.097	-7.62	-7.62	-7.62	-7.62	-21.14	0.31 QAR	0.46	19.81
NAT BANK OF OMAN	0.166	0.00	0.00	-4.60	-4.60	-9.78	0.27 QAR	0.51	6.48
OMINVEST	0.342	0.00	0.59	0.59	0.59	3.64	0.28 QAR	0.89	8.64

Summary - Absolute change in Foreign Ownership

	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
1-Jul-20	16.57%	11.82%	0.09%	0.37%	0.35%	3.55%	3.39%	7.51%	3.33%	2.90%
8-Jul-20	16.54%	11.82%	0.09%	0.37%	0.35%	3.55%	3.38%	7.50%	3.34%	2.90%

End of Report

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Leading Sector Performance

Kuwait

The market are down today by -0.13 % The leading sector bottom performance indices today are Industrials -1.86 % Real estate -0.97 % Telecom -0.44 % respectively

from YTD performance perspective the best sector performance are Consumer goods by 11.53 % while the bottom sector performance is Consumer services by -29.14 %

KFH has a positive price return performance spread over NBK in YTD perspective by +1.61%.

Banking sector performance year to date are -22.3%

KSA

Saudi Armco are have positive performance today by + 0.3 %, SABIC have positive performance today by + 0.11 %

STC are have negative performance today by -0.21 %, Al Rajhi Bank have positive performance today by + 0.35 %

UAE

ETISALAT.AD are up today by -0.83% also less affected by the COVID 19 Crises as telecommunication sectors are outperform and act defensively on this crises.



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