



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

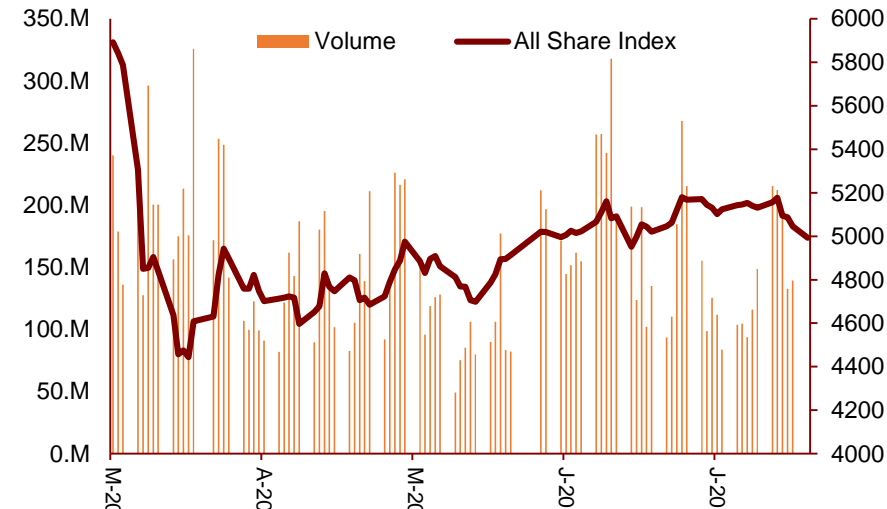
Tuesday, July 21, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	4,980.88	-0.19	-1.29	-2.92	-2.92	-20.72	28.81 KWD	1.48	14.92
Kuwait Premier Index	5,420.06	-0.20	-1.48	-3.34	-3.34	-22.30	20.87 KWD	1.57	14.92
Kuwait Main Index	4,114.51	-0.18	-0.79	-1.80	-1.80	-16.21	7.94 KWD	1.25	14.91
Kuwait Sector									
Banking	1,126.29	0.00	-1.25	-2.92	-2.92	-24.03	16.68 KWD	1.52	15.25
Telecom	996.99	-1.03	-2.59	-3.79	-3.79	-10.72	3.06 KWD	1.75	11.21
Industrials	777.40	-0.28	-0.41	-2.37	-2.37	-16.18	2.77 KWD	1.33	16.41
Financial services	834.62	-0.34	-1.37	-3.84	-3.84	-22.83	2.12 KWD	0.80	11.68
Real estate	846.69	-0.92	-2.88	-5.21	-5.21	-20.02	1.82 KWD	0.88	12.16
Basic materials	846.42	0.47	1.24	3.53	3.53	-6.79	0.75 KWD	1.20	18.27
Health care	839.19	0.00	0.00	2.21	2.21	-5.13	0.42 KWD	6.29	47.76
Consumer services	749.18	0.34	-1.07	-3.67	-3.67	-30.13	0.39 KWD	1.40	8.84
Insurance	938.36	0.11	-0.11	-1.78	-1.78	-1.63	0.35 KWD	0.78	8.08
Consumer goods	722.75	1.33	2.74	-1.84	-1.84	13.43	0.22 KWD	1.54	30.99
Oil and Gas	1,095.25	0.00	0.18	0.37	0.37	-11.54	0.23 KWD	1.63	9.14
Technology	465.60	0.00	0.00	-5.88	-5.88	-9.60	0.01 KWD	0.50	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	7,417.26	0.54	-0.13	2.67	2.67	-11.59	8,376 SAR	5.36	29.07
Qatar (QE Index)	9,396.40	0.26	0.58	4.07	4.07	-10.17	498 QAR	1.64	32.52
Dubai (DFMGI)	2,088.54	1.14	1.75	1.13	1.13	-24.46	225 AED	0.96	7.85
Abu Dhabi (ADI)	4,256.66	0.43	-0.42	-0.68	-0.68	-16.14	596 AED	4.07	18.37
Bahrain (BAX)	1,302.90	0.73	0.03	1.98	1.98	-19.08	14 BHD	0.99	16.33
MUSCAT SE INDEX	3,476.95	0.51	0.78	-1.11	-1.11	-12.67	4 OMR	0.73	9.35
Developed Markets									
MSCI World Index	2,312.95	0.83	0.83	5.05	5.05	-1.93			
U.S. (S&P 500)	3,251.84	0.84	0.84	4.89	4.89	0.65			
U.K. (FTSE 100)	6,290.65	0.47	0.01	1.96	1.96	-16.60			
Japan (Topix)	1,582.74	0.36	0.56	1.54	1.54	-8.05			
Emerging Markets									
MSCI EM Index	1,064.50	0.90	0.89	6.97	6.97	-4.50			
China (SSE Composite)	3,320.89	0.20	3.32	11.26	11.26	8.88			
India (Sensex)	37,930.33	1.37	2.55	8.73	8.73	-7.97			



What Move the GCC markets , Oil Prices

Oil prices rose on Tuesday, helped by positive news about vaccine trials and a European Union stimulus deal reaching levels last seen when an oil price war erupted in early March between Russia and Saudi Arabia.

OPEC+ has been cutting output since May by 9.7 million barrels per day, or 10% of global supply, but from August, cuts will officially taper to 7.7 million bpd until December . **Benchmark Brent crude was up \$1.17 cents at \$44.45, on track for its biggest daily rise since mid-June at around 2.7%**

Kuwait Market

The market are closed today down by -0.19%, linked to the downgrade of S&P to Kuwait credit rating to -AA from AA , also the 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 24 Million KD.**

Saudi Market

The Market closed up today by +0.54% , linked to the effect of the re-opining the local economy also the oil performance above 44\$ with the production cuts.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



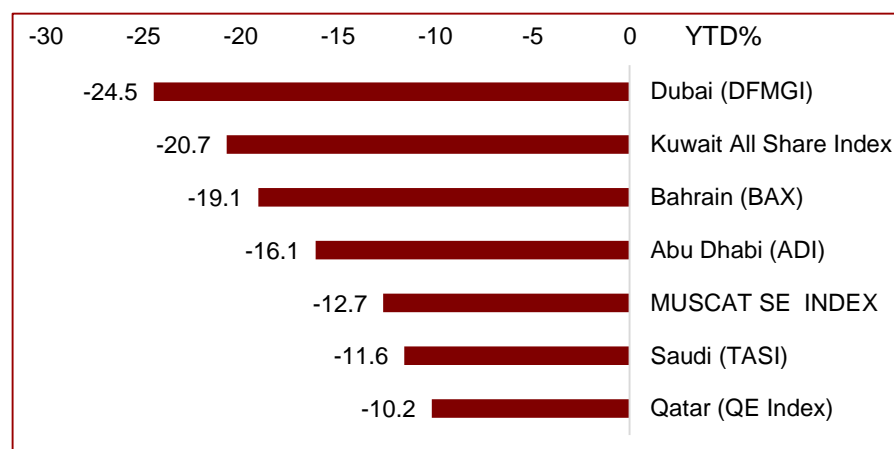
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	0.775	-0.26	-3.00	-5.60	-5.60	-23.95	5.31 KWD	1.36	13.62
KFH	0.584	-0.68	-1.18	-4.58	-4.58	-20.79	4.48 KWD	1.96	18.08
Zain	0.533	-1.11	-2.91	-3.96	-3.96	-11.17	2.31 KWD	1.88	11.47
BOUBYAN BANK	0.525	0.38	-0.94	-1.32	-1.32	-14.00	1.59 KWD	2.44	26.59
Agility	0.733	-0.41	0.00	-0.14	-0.14	-10.39	1.29 KWD	1.11	14.56
Saudi Arabia									
ARAMCO	33.00	-0.30	-1.20	1.54	1.54	-6.38	6,619.82 SAR	6.18	21.31
SABIC	87.50	1.04	-0.79	-0.68	-0.68	-6.82	259.79 SAR	1.56	218.60
STC	97.00	1.04	1.04	-2.02	-2.02	-4.72	191.99 SAR	3.05	17.71
AL-RAJHI BANK	57.40	0.70	0.00	1.41	1.41	-12.23	142.50 SAR	2.87	14.41
NCB	35.90	-0.28	0.00	-3.62	-3.62	-27.11	108.00 SAR	1.68	9.40
United Arab Emirates									
ETISALAT.AD	16.60	-1.31	-0.84	0.61	0.61	1.47	146.28 AED	3.24	16.89
FAB.AD	10.66	1.72	-3.12	-6.23	-6.23	-30.47	114.44 AED	1.22	10.14
EMIRATES NBD	9.14	5.91	6.90	3.16	3.16	-29.69	57.73 AED	0.71	3.76
DB ISLAMIC BK	3.81	-0.26	-1.04	-0.26	-0.26	-30.85	27.59 AED	0.78	5.88
EMAAR PROPERT	2.70	0.37	2.27	-1.10	-1.10	-32.84	19.33 AED	0.36	3.11
Qatar									
QNB	18.15	0.28	-0.61	3.91	3.91	-12.24	167.56 QAR	1.84	12.99
INDUSTRIES QAT	8.10	2.53	2.96	5.76	5.76	-20.83	47.91 QAR	1.49	22.71
QA ISLAMIC BK	15.99	-0.06	2.44	1.46	1.46	4.24	37.89 QAR	1.87	13.29
MASRAF AL RAYA	3.91	0.33	0.44	2.07	2.07	-1.54	29.30 QAR	2.20	13.41
MESAIEED PETRO	2.12	0.86	-0.71	3.22	3.22	-16.93	26.44 QAR	1.83	27.27
OMAN									
BANK MUSCAT	0.340	0.00	0.00	0.60	0.60	-18.23	1.10 OMR	0.58	6.43
OMANTEL	0.608	0.00	0.00	-5.00	-5.00	-1.30	0.46 OMR	0.81	5.87
BANK DHOFAH	0.098	0.00	1.03	-6.67	-6.67	-20.33	0.29 QAR	0.43	18.49
NAT BANK OF OMAN	0.170	0.00	3.66	-2.30	-2.30	-7.61	0.28 QAR	0.52	6.64
OMINVEST	0.340	0.00	0.00	0.00	0.00	3.03	0.27 QAR	0.88	8.59

Summary - Absolute change in Foreign Ownership

	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
8-Jul-20	16.54%	11.82%	0.09%	0.37%	0.35%	3.55%	3.38%	7.50%	3.34%	2.90%
15-Jul-20	16.48%	11.83%	0.09%	0.36%	0.32%	3.53%	3.38%	7.54%	3.34%	2.90%

End of Report

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Leading Sector Performance

Kuwait

The market are down today by -0.19 % The leading sector bottom performance indices today are Telecom -1.03 % Real estate -0.92 % Financial services -0.34 % respectively

from YTD performance perspective the best sector performance are Consumer goods by 13.43 % while the bottom sector performance is Consumer services by -30.13 %

KFH has a positive price return performance spread over NBK in YTD perspective by +3.16%. Banking sector performance year to date are -24%

KSA

Saudi Armco are have negative performance today by -0.3 %, SABIC have positive performance today by + 1.04 %

STC are have positive performance today by + 1.04 %, Al Rajhi Bank have positive performance today by + 0.7 %

UAE

ETISALAT.AD are down today by -1.31% also less affected by the COVID 19 Crises as telecommunication sectors are outperform and act defensively on this crises.



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