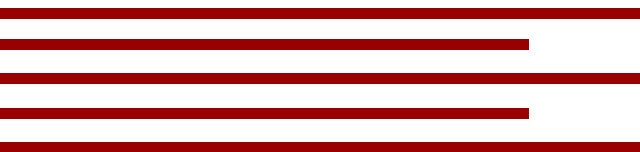
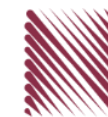


شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



## GCC DAILY MARKET WRAP

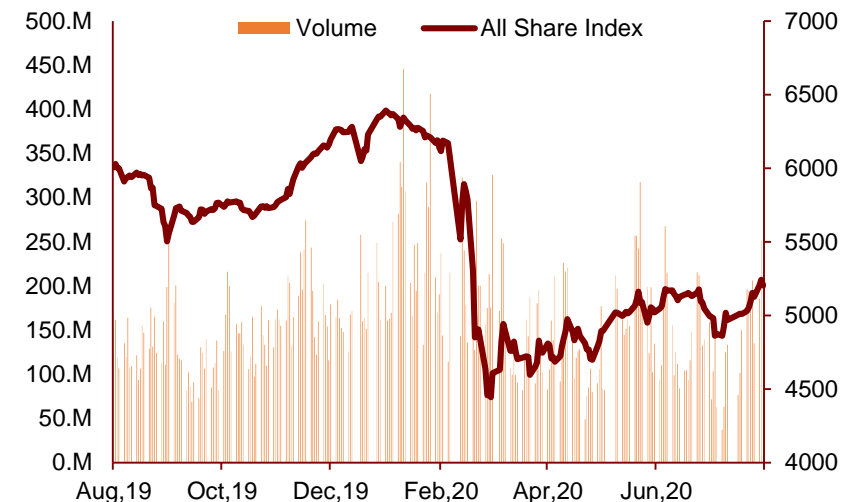
Tuesday, August 18, 2020



### Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>		%	%	%	%	%			
Kuwait All Share Index	5,202.23	-0.77	1.49	4.71	1.39	-17.19	30.10 KWD	1.71	18.53
Kuwait Permier Index	5,740.80	-0.99	1.82	6.29	2.65	-17.49	22.11 KWD	1.85	19.51
Kuwait Main Index	4,136.61	-0.15	1.19	1.14	-1.37	-15.85	7.99 KWD	1.32	15.80
<b>Kuwait Sector</b>									
Banking	1,202.09	-0.72	2.12	6.95	3.61	-18.92	17.76 KWD	1.85	19.69
Telecom	1,066.22	-0.24	1.96	5.55	2.89	-4.52	3.27 KWD	1.92	13.04
Industrials	757.09	-0.74	-1.44	-2.13	-4.92	-18.37	2.70 KWD	1.23	15.72
Financial services	849.52	-0.03	3.36	1.59	-2.12	-21.45	2.16 KWD	0.91	13.17
Real estate	877.68	-0.62	1.35	3.76	-1.74	-17.10	1.89 KWD	1.02	23.65
Basic materials	789.64	-0.71	0.44	3.57	-3.41	-13.04	0.70 KWD	1.12	17.26
Health care	839.19	0.00	0.00	0.00	2.21	-5.13	0.42 KWD	6.14	52.50
Consumer services	721.86	-1.05	-2.31	-4.42	-7.18	-32.68	0.37 KWD	1.85	8.91
Insurance	944.78	-1.41	-0.73	0.70	-1.11	-0.95	0.35 KWD	0.82	7.78
Consumer goods	792.42	1.70	3.35	9.53	7.62	24.37	0.24 KWD	1.64	30.33
Oil and Gas	1,078.61	-1.64	0.28	-1.52	-1.15	-12.89	0.22 KWD	1.60	10.42
Technology	443.78	-0.81	-0.81	-4.69	-10.29	-13.84	0.01 KWD	0.48	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>		%	%	%	%	%			
Saudi (TASI)	7,853.57	1.24	1.94	5.29	8.71	-6.39	8,539 SAR	5.63	25.65
Qatar (QE Index)	9,775.28	0.82	1.57	4.11	8.38	-6.45	515 QAR	1.69	58.14
Dubai (DFMGI)	2,224.61	0.84	3.21	8.48	7.71	-19.54	239 AED	48.85	10.17
Abu Dhabi (ADI)	4,445.48	0.32	1.34	3.27	3.73	-12.42	678 AED	4.51	14.40
Bahrain (BAX)	1,348.96	0.03	2.87	4.52	5.58	-16.22	15 BHD	1.21	19.86
MUSCAT SE INDEX	3,570.58	0.54	0.15	0.07	1.55	-10.31	4 OMR	0.74	10.49
<b>Developed Markets</b>									
MSCI World Index	2,393.97	0.41	0.41	3.86	8.73	1.51			
U.S. (S&P 500)	3,381.99	0.27	0.27	3.39	9.09	4.68			
U.K. (FTSE 100)	6,130.85	0.06	0.67	3.95	-0.63	-18.72			
Japan (Topix)	1,610.85	0.06	-0.77	7.67	3.34	-6.42			
<b>Emerging Markets</b>									
MSCI EM Index	1,099.96	0.62	0.62	1.95	10.54	-1.32			
China (SSE Composite)	3,451.09	0.36	2.71	4.26	15.63	13.15			
India (Sensex)	38,528.32	1.26	1.76	2.49	10.39	-6.57			



### What Move the GCC markets , Oil Prices

Oil prices slipped on Tuesday, though they mostly held onto overnight gains after OPEC+ said the producer grouping is almost fully complying with output cuts to support prices amid a drop in demand for fuels due to the coronavirus pandemic.

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 was down 9 cents, or 0.2%, at \$45.28 a barrel,**

### Kuwait Market

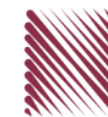
The market are closed today down by -0.77%, after two consecutive green day and last week in positive territory due to re-opening the local economy and the effect of demand recovery and production cut effect on the oil prices also the positive effect on inflows from MSCI in Nov 2020 also new companies traded and the expected positive effect to the market liquidity.

### Saudi Market

The Market closed up today by +1.24% , 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



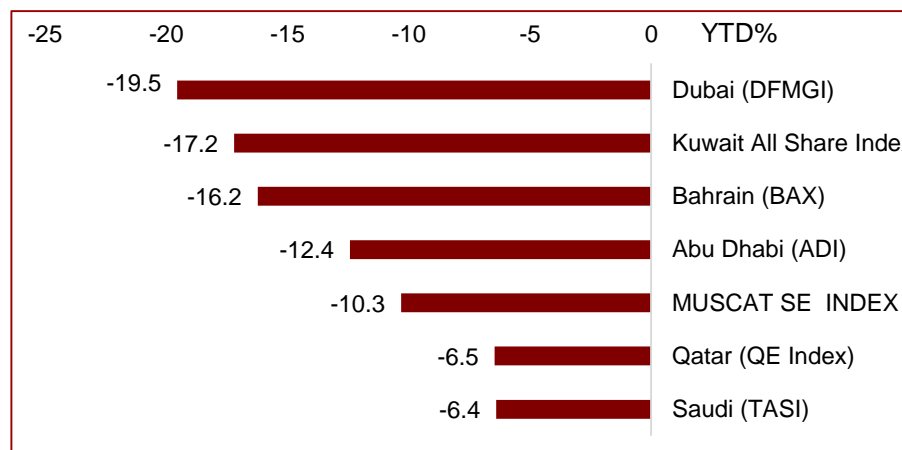
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Blue Chip Watch</b>									
		%	%	%	%	%			
<b>Kuwait</b>									
NBK	0.829	-0.96	2.21	5.45	1.34	-18.36	5.68 KWD	1.60	20.10
KFH	0.613	-1.29	0.33	6.57	0.65	-16.45	4.70 KWD	2.50	23.83
Zain	0.589	-0.17	2.61	7.09	6.13	-1.83	2.55 KWD	2.08	12.55
BOUBYAN BANK	0.560	0.00	0.54	5.46	5.26	-8.27	1.70 KWD	2.97	33.73
Agility	0.618	-1.44	-3.43	-3.28	-3.02	-12.98	1.25 KWD	1.06	18.83
<b>Saudi Arabia</b>									
ARAMCO	34.00	1.49	1.49	3.03	4.62	-3.55	6,700.18 SAR	6.53	27.48
SABIC	88.80	0.23	0.00	-0.11	0.79	-5.43	265.81 SAR	1.63	0.00
STC	96.80	0.10	0.10	-0.41	-2.22	-4.91	193.41 SAR	3.07	18.01
AL-RAJHI BANK	64.50	0.62	2.71	9.51	13.96	-1.38	160.25 SAR	3.09	16.28
NCB	38.50	1.72	3.77	6.06	3.36	-21.83	113.55 SAR	1.55	10.54
<b>United Arab Emirates</b>									
ETISALAT.AD	16.88	0.60	1.56	1.44	2.30	3.18	146.80 AED	3.23	16.55
FAB.AD	11.18	-0.18	0.72	2.20	-0.71	-26.39	122.09 AED	1.25	11.68
EMIRATES NBD	10.45	1.95	7.18	18.21	17.95	-19.62	66.01 AED	0.81	5.70
DB ISLAMIC BK	4.07	2.52	4.63	7.96	6.54	-26.13	29.47 AED	0.81	6.95
EMAAR PROPERT	2.88	3.60	3.60	12.06	5.49	-28.36	20.62 AED	0.37	3.91
<b>Qatar</b>									
QNB	18.52	0.11	1.87	2.89	6.50	-10.05	171.06 QAR	1.89	13.27
INDUSTRIES QAT	8.90	-0.20	1.14	13.81	15.64	-13.42	53.85 QAR	1.67	33.72
QA ISLAMIC BK	16.23	0.43	0.43	0.62	2.86	5.68	38.35 QAR	1.84	13.39
MASRAF AL RAYA	4.20	2.19	3.90	6.12	9.40	5.53	31.46 QAR	2.37	14.10
MESAEED PETRO	2.16	-0.14	-0.14	2.97	6.29	-14.46	27.07 QAR	1.76	26.54
<b>OMAN</b>									
BANK MUSCAT	0.372	2.79	3.95	5.14	9.52	-10.97	1.20 OMR	0.61	7.31
OMANTEL	0.608	0.00	-0.65	0.00	-5.00	-1.30	0.46 OMR	0.86	6.66
BANK DHOFAR	0.101	0.00	1.00	1.00	-3.81	-17.89	0.30 QAR	0.44	19.80
NAT BANK OF OMAN	0.175	4.17	3.55	3.55	0.57	-4.89	0.28 QAR	0.54	7.06
OMINVEST	0.338	0.00	0.00	-1.74	-0.59	2.42	0.27 QAR	1.09	6.43

### Summary - Absolute change in Foreign Ownership

	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
5-Aug-20	16.51%	11.46%	0.08%	0.36%	0.33%	3.57%	3.36%	7.58%	3.41%	2.92%
12-Aug-20	16.54%	11.44%	0.07%	0.35%	0.33%	3.57%	3.35%	7.52%	3.45%	2.92%

### End of Report

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### Leading Sector Performance

#### Kuwait

The market are down today by -0.77 % The leading sector bottom performance indices today are Oil and Gas -1.64 % Insurance -1.41 % Consumer services -1.05 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 24.37 % while the bottom sector performance is Consumer services by -32.68 %

Telecommunication sector are down today by -0.24 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 12.67 %

#### KSA

Saudi Armco are have positive performance today by + 1.49 %, SABIC have positive performance today by + 0.23 %

STC are have positive performance today by + 0.1 %, Al Rajhi Bank have positive performance today by + 0.62 %

#### UAE

ETISALAT AD are up today by 0.60% , still outperform the market performance and act defensively with COVID19



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