

# Daily Markets Wrap,

## NIC Research and Studies Dep - June 25, 2020

### Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>		%	%	%	%	%			
Kuwait All Share Index	5,167.74	-0.23	2.94	3.45	7.15	-17.74	29.97 KWD	1.53	15.37
Kuwait Permier Index	5,656.71	-0.22	3.92	4.28	8.81	-18.91	21.84 KWD	1.63	15.49
Kuwait Main Index	4,201.83	-0.26	0.38	1.24	2.91	-14.43	8.14 KWD	1.27	15.04
<b>Kuwait Sector</b>									
Banking	1,169.29	-0.28	3.74	2.66	5.54	-21.13	17.38 KWD	1.58	15.93
Telecom	1,047.83	-0.72	0.90	5.44	8.45	-6.17	3.23 KWD	1.76	11.20
Industrials	802.70	0.82	5.46	8.64	17.96	-13.46	2.83 KWD	1.31	16.07
Financial services	870.91	-0.56	0.51	-1.80	3.31	-19.47	2.24 KWD	0.86	12.36
Real estate	893.69	-0.54	1.58	5.46	6.82	-15.58	1.93 KWD	0.97	13.53
Basic materials	815.08	0.90	1.87	8.84	28.10	-10.24	0.72 KWD	1.17	17.82
Health care	828.60	0.04	-0.90	-1.44	-2.67	-6.33	0.41 KWD	6.42	47.21
Consumer services	783.61	0.04	1.44	6.67	8.34	-26.92	0.41 KWD	1.63	9.03
Insurance	972.61	0.49	-0.39	2.15	1.43	1.96	0.36 KWD	0.82	8.39
Consumer goods	740.63	-0.37	-1.06	1.97	18.57	16.24	0.23 KWD	1.57	32.33
Oil and Gas	1,086.70	-1.79	1.00	5.12	-0.96	-12.24	0.23 KWD	1.55	9.14
Technology	496.88	0.00	0.00	4.27	11.97	-3.53	0.01 KWD	0.54	0.00

### What Move the GCC markets , Oil Prices

Oil prices slipped on Thursday, extending losses of more than 5% in the previous session, weighed down by record high U.S. crude inventories and worries that a rapid resurgence in Covid-19 cases could choke a revival in fuel demand.

A rising number of coronavirus cases in the United States, China, Latin America and India has unnerved investors.

*Brent crude futures fell 43 cents, or 1.07%, to \$39.88 per barrel after falling \$2.32*

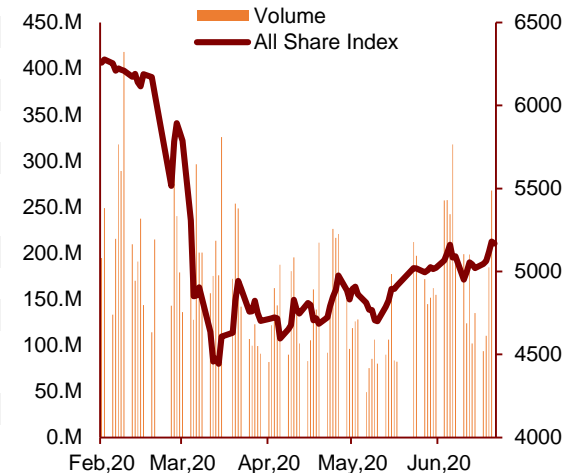
### Kuwait Market

The market are closed today in negative territory by -0.23%, Worries about a second wave of Covid-19 cases in all over the globe .*traded over 28.1 Million KD.*

### Saudi Market

The Market closed up today by +0.26% ,the performance are linked by re-opening the local economy and partial recovery of aggregate demand.

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>		%	%	%	%	%			
Saudi (TASI)	7,232.34	0.26	-1.68	0.27	11.18	-13.79	8,287 SAR	5.31	29.10
Qatar (QE Index)	9,184.97	-0.44	-1.15	4.17	12.26	-11.63	478 QAR	1.67	22.83
Dubai (DFMGI)	2,086.51	-0.60	0.39	7.27	17.79	-24.53	225 AED	0.96	8.08
Abu Dhabi (ADI)	4,285.59	-1.02	-1.37	3.48	14.75	-15.57	491 AED	4.14	23.82
Bahrain (BAX)	1,279.38	-0.11	0.40	0.77	-5.27	-20.54	13 BHD	0.94	16.41
MUSCAT SE INDEX	3,525.77	0.03	0.28	-0.53	2.25	-11.44	4 OMR	0.74	9.85
<b>Developed Markets</b>									
MSCI World Index	2,180.12	-2.50	-1.31	1.50	17.67	-7.56			
U.S. (S&P 500)	3,050.33	0.00	-1.53	0.20	18.02	-5.59			
U.K. (FTSE 100)	6,129.00	0.09	-2.60	0.86	8.05	-18.74			
Japan (Topix)	1,561.85	-1.18	-1.32	-0.12	11.32	-9.27			
<b>Emerging Markets</b>									
MSCI EM Index	1,010.79	-0.38	0.94	8.65	19.12	-9.32			
China (SSE Composite)	2,979.55	0.30	0.40	4.46	8.34	-2.31			
India (Sensex)	34,842.10	-0.08	0.32	7.46	18.24	-15.54			



### Notes

PBV is calculated by the last closing price divided by the latest fiscal period total equity per share and PBV for the index its calculated on the weighted average scaled by market cap , also PE are market cap weighted average.

Sources : Reuters , NIC

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	0.827	-0.36	4.95	7.26	14.86	-18.85	5.68 KWD	1.46	14.55
KFH	0.618	0.32	3.52	0.32	7.56	-16.18	4.72 KWD	2.06	18.94
Zain	0.564	-0.88	0.89	6.42	9.30	-6.00	2.46 KWD	1.90	11.35
BOUBYAN BANK	0.533	-0.56	9.45	4.92	9.52	-12.69	1.62 KWD	2.49	27.26
Agility	0.742	0.68	9.12	12.42	30.40	-9.29	1.30 KWD	1.11	14.58
<b>Saudi Arabia</b>									
ARAMCO	32.70	-0.30	-1.21	-0.91	8.46	-7.23	6,559.13 SAR	6.13	21.15
SABIC	87.70	-0.11	-3.84	2.21	25.29	-6.60	263.36 SAR	1.58	221.34
STC	98.90	-0.10	-0.10	-0.60	13.03	-2.85	197.97 SAR	3.15	18.23
AL-RAJHI BANK	57.80	0.52	-1.87	0.17	7.43	-11.62	143.73 SAR	2.90	14.74
NCB	37.25	0.00	-0.93	-6.87	7.35	-24.37	111.74 SAR	1.74	9.73
<b>United Arab Emirates</b>									
ETISALAT.AD	16.78	-0.71	-0.36	6.74	19.69	2.57	146.98 AED	3.26	16.97
FAB.AD	11.04	-1.60	-3.16	-0.90	14.40	-27.18	122.52 AED	1.31	10.85
EMIRATES NBD	8.90	-1.11	-3.26	3.97	23.10	-31.54	56.85 AED	0.72	3.92
DB ISLAMIC BK	3.88	0.00	-2.27	11.17	7.78	-29.58	28.09 AED	0.79	5.97
EMAAR PROPERT	2.78	-0.71	2.21	10.76	25.23	-30.85	20.05 AED	0.37	3.23
<b>Qatar</b>									
QNB	18.00	-1.59	1.12	5.54	7.74	-12.09	167.59 QAR	1.93	11.98
INDUSTRIES QAT	8.04	-0.81	-3.58	3.96	21.94	-21.12	48.65 QAR	1.53	23.31
QA ISLAMIC BK	16.12	0.75	-2.01	5.84	12.26	5.15	37.51 QAR	1.87	13.25
MASRAF AL RAYA	3.88	0.10	-0.77	0.03	6.04	-1.99	28.84 QAR	2.28	13.33
MESAEED PETRO	2.10	-1.36	-1.12	5.22	44.86	-15.74	26.53 QAR	1.85	27.65
<b>OMAN</b>									
BANK MUSCAT	0.342	0.59	3.01	-1.16	6.88	-17.26	1.10 OMR	0.58	6.46
OMANTEL	0.648	0.00	0.00	1.25	10.58	5.19	0.49 OMR	0.86	6.25
BANK DHOFAR	0.105	0.00	-0.94	0.96	16.67	-14.63	0.31 QAR	0.46	19.81
NAT BANK OF OMAN	0.170	1.80	3.03	9.68	6.25	-7.61	0.27 QAR	0.51	6.52
OMINVEST	0.350	0.00	0.00	2.94	9.38	6.06	0.28 QAR	0.91	8.84

## Leading Sector Performance

### Kuwait

The market are down by -0.23% this week. The leading sector negative performance indices today is oil and gas ,Telecom , Financial Services, sector by -1.79%, -0.72% and -0.56% , respectively.

Telecommunication sector are down today by -0.72% and act defensively in Covid 19 and outperform Kuwait market index in YTD perspective by +11.58%.

Consumer goods are the best performance sector have YTD positive performance by +16.24%, the performance are linked to COVID 19 effect.

KFH has a positive price return performance spread over NBK in YTD perspective by +2.67%.

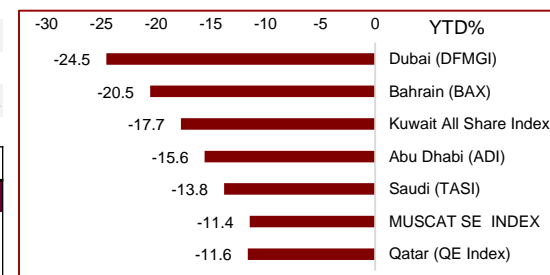
### KSA

Saudi Aramco in negative performance today -0.30% and SABIC have negative performance by -0.11% compared to yesterday close .

STC also have flat performance today by -0.10% and still less affected by the COVID 19 Crises as telecommunication sectors are outperform,

### UAE

ETISALAT.AD are down by -0.71% today also less affected by the COVID 19 Crises as telecommunication sectors are outperform and act defensively on this crises.



## Summary - Absolute change in Foreign Ownership

	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
17-Jun-20	16.46%	11.76%	0.09%	0.37%	0.34%	3.72%	3.34%	7.41%	3.28%	2.90%
24-Jun-20	16.45%	11.83%	0.09%	0.37%	0.35%	3.56%	3.37%	7.42%	3.27%	2.90%

## End of Report

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