



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

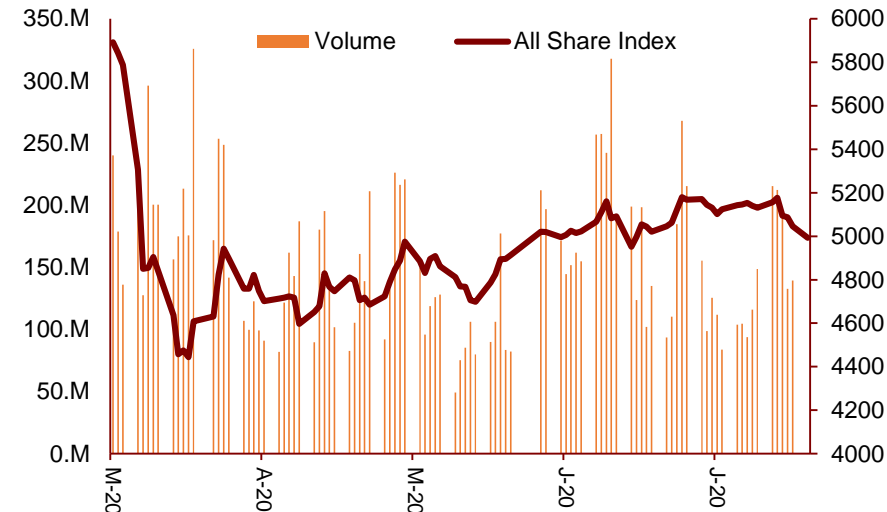
Monday, July 20, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	4,990.52	-0.05	-1.10	-2.73	-2.73	-20.56	28.88 KWD	1.49	14.93
Kuwait Premier Index	5,430.88	-0.10	-1.29	-3.14	-3.14	-22.15	20.92 KWD	1.58	14.94
Kuwait Main Index	4,121.79	0.07	-0.61	-1.63	-1.63	-16.06	7.95 KWD	1.25	14.89
Kuwait Sector									
Banking	1,126.27	-0.08	-1.25	-2.92	-2.92	-24.04	16.69 KWD	1.52	15.28
Telecom	1,007.32	-0.38	-1.58	-2.79	-2.79	-9.79	3.09 KWD	1.77	11.25
Industrials	779.61	0.43	-0.13	-2.09	-2.09	-15.95	2.78 KWD	1.34	16.30
Financial services	837.49	0.06	-1.03	-3.51	-3.51	-22.56	2.13 KWD	0.80	11.73
Real estate	854.59	-0.43	-1.97	-4.33	-4.33	-19.28	1.84 KWD	0.90	12.20
Basic materials	842.43	0.72	0.77	3.05	3.05	-7.23	0.75 KWD	1.20	18.17
Health care	839.19	0.00	0.00	2.21	2.21	-5.13	0.42 KWD	6.29	47.76
Consumer services	746.67	-0.11	-1.40	-3.99	-3.99	-30.36	0.39 KWD	1.40	8.82
Insurance	937.29	-0.16	-0.23	-1.89	-1.89	-1.74	0.34 KWD	0.78	8.07
Consumer goods	713.27	0.34	1.39	-3.13	-3.13	11.94	0.22 KWD	1.51	30.88
Oil and Gas	1,095.25	0.16	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)	7,377.36	-0.62	-0.67	2.12	2.12	-12.06	8,398 SAR	5.36	29.23
Qatar (QE Index)	9,371.73	0.59	0.54	4.02	4.02	-10.21	497 QAR	1.67	31.97
Dubai (DFMGI)	2,064.96	0.17	0.60	-0.02	-0.02	-25.31	222 AED	0.97	7.88
Abu Dhabi (ADI)	4,238.51	-0.41	-0.84	-1.10	-1.10	-16.50	596 AED	4.07	18.37
Bahrain (BAX)	1,293.42	0.17	-0.70	1.24	1.24	-19.67	14 BHD	0.98	16.38
MUSCAT SE INDEX	3,459.20	0.23	0.26	-1.62	-1.62	-13.11	4 OMR	0.73	9.34
Developed Markets									
MSCI World Index	2,293.92	0.22	0.00	4.18	4.18	-2.74			
U.S. (S&P 500)	3,224.73	0.28	1.25	4.01	4.01	-0.19			
U.K. (FTSE 100)	6,258.04	-0.51	-0.51	1.43	1.43	-17.03			
Japan (Topix)	1,577.03	0.20	0.20	1.17	1.17	-8.38			
Emerging Markets									
MSCI EM Index	1,055.06	0.86	0.00	6.03	6.03	-5.35			
China (SSE Composite)	3,314.15	3.11	3.11	11.04	11.04	8.66			
India (Sensex)	37,418.99	1.08	1.16	7.26	7.26	-9.22			



What Move the GCC markets ,

Oil Prices

Oil prices fell on Monday, unnerved by the prospect that a recovery in fuel demand could be derailed by a rise in the pace of coronavirus infections around the world.

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 . **Brent crude was down 34 cents, or 0.8%, at \$42.80 a barrel**

Kuwait Market

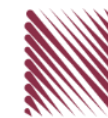
The market are closed today down by -0.05%, linked to the downgrade of S&P to Kuwait credit rating to -AA from AA , also the uncertainty of the closer disclosures of companies semiannual financial results and fear of the second wave coronavirus effect of the global economy. **Value traded over 15.9 Million KD.**

Saudi Market

The Market closed flat today by -0.62% , linked to the effect of the re-opening the local economy also the oil performance above 42\$ with the production cuts.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



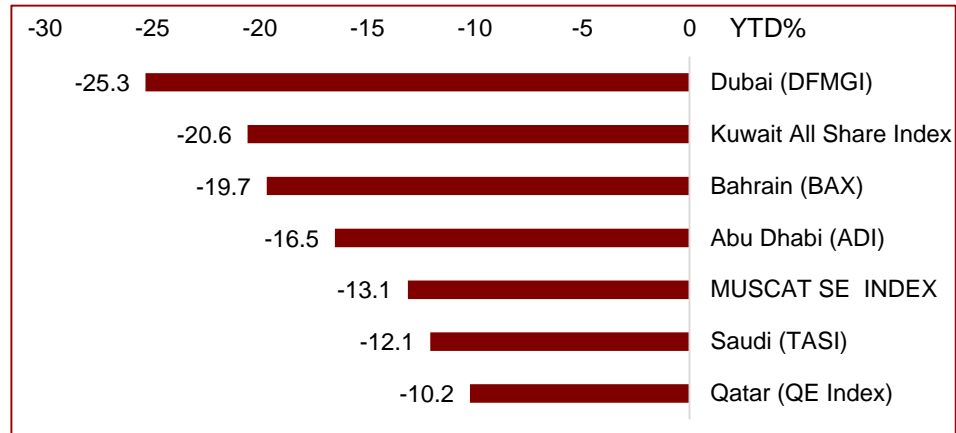
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.777	-1.02	-2.75	-5.36	-5.36	-23.75	5.32 KWD	1.36	13.77
KFH	0.588	0.34	-0.51	-3.92	-3.92	-20.25	4.51 KWD	1.97	18.02
Zain	0.539	-0.55	-1.82	-2.88	-2.88	-10.17	2.33 KWD	1.90	11.53
BOUBYAN BANK	0.523	-0.19	-1.32	-1.69	-1.69	-14.33	1.58 KWD	2.43	26.65
Agility	0.736	0.82	0.41	0.27	0.27	-10.02	1.30 KWD	1.11	14.44
Saudi Arabia									
ARAMCO	33.10	-0.15	-0.90	1.85	1.85	-6.10	6,630.00 SAR	6.19	21.47
SABIC	86.60	-1.48	-1.81	-1.70	-1.70	-7.77	263.70 SAR	1.58	219.35
STC	96.00	0.10	0.00	-3.03	-3.03	-5.70	191.80 SAR	3.05	17.73
AL-RAJHI BANK	57.00	-0.52	-0.70	0.71	0.71	-12.84	143.25 SAR	2.89	14.43
NCB	36.00	0.00	0.28	-3.36	-3.36	-26.90	108.00 SAR	1.68	9.37
United Arab Emirates									
ETISALAT.AD	16.82	0.24	-0.48	0.97	0.97	1.83	146.28 AED	3.24	16.85
FAB.AD	10.48	-2.24	-4.41	-7.47	-7.47	-31.40	114.44 AED	1.22	10.37
EMIRATES NBD	8.63	-1.93	0.94	-2.60	-2.60	-33.62	54.51 AED	0.69	3.84
DB ISLAMIC BK	3.82	-1.29	-0.78	0.00	0.00	-30.67	27.66 AED	0.78	5.95
EMAAR PROPERT	2.69	2.67	1.89	-1.47	-1.47	-33.08	19.26 AED	0.36	3.03
Qatar									
QNB	18.10	0.39	-0.49	4.03	4.03	-12.14	167.18 QAR	1.91	11.81
INDUSTRIES QAT	7.90	0.64	0.59	3.33	3.33	-22.65	47.80 QAR	1.49	22.57
QA ISLAMIC BK	16.00	0.63	2.24	1.27	1.27	4.04	37.81 QAR	1.87	13.20
MASRAF AL RAYA	3.90	0.65	0.41	2.04	2.04	-1.57	29.24 QAR	2.29	13.33
MESAIEED PETRO	2.10	-0.28	0.71	4.70	4.70	-15.74	26.38 QAR	1.83	27.35
OMAN									
BANK MUSCAT	0.338	0.60	0.00	0.60	0.60	-18.23	1.10 OMR	0.58	6.39
OMANTEL	0.608	0.66	0.00	-5.00	-5.00	-1.30	0.46 OMR	0.81	5.83
BANK DHOFAR	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	3.03	3.66	-2.30	-2.30	-7.61	0.28 QAR	0.52	6.45
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 -0.05 % The leading sector bottom performance indices today are Real estate -0.43 % Telecom -0.38 % Insurance -0.16 % respectively

from YTD performance perspective the best sector performance are Consumer goods by 11.94 % while the bottom sector performance is Consumer services by -30.36 %

KFH has a positive price return performance spread over NBK in YTD perspective by +3.5%. Banking sector performance year to date are -24%

KSA

Saudi Armco are have negative performance today by -0.15 %, SABIC have negative performance today by -1.48 %

STC are have positive performance today by +0.1 %, Al Rajhi Bank have negative performance today by -0.52 %

UAE

ETISALAT.AD are up today by +0.24% also less affected by the COVID 19 Crises as telecommunication sectors are outperform and act defensively on this crises.



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