

شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

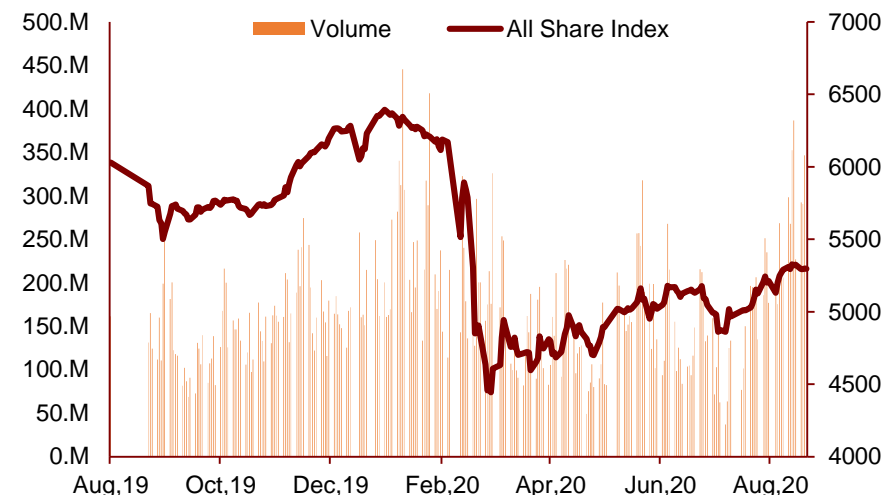
Wednesday, September 9, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	5,295.75	-0.03	-0.57	0.03	3.22	-15.71	30.72 KWD	1.76	18.20
Kuwait Permier Index	5,812.94	-0.05	-0.89	-0.71	3.67	-16.67	22.47 KWD	1.89	19.52
Kuwait Main Index	4,274.80	0.01	0.34	2.15	2.02	-12.95	8.25 KWD	1.43	14.62
Kuwait Sector									
Banking	1,225.62	-0.03	-0.90	-0.57	5.64	-17.34	18.18 KWD	1.95	19.14
Telecom	1,050.06	-0.02	-0.36	-1.93	1.33	-5.97	3.22 KWD	1.88	12.71
Industrials	779.27	-0.11	0.10	1.74	-2.13	-15.98	2.79 KWD	1.28	20.91
Financial services	915.26	0.08	0.29	4.55	5.45	-15.37	2.31 KWD	0.92	7.52
Real estate	889.97	0.28	0.55	1.88	-0.37	-15.93	1.91 KWD	0.99	22.80
Basic materials	768.26	-0.29	-1.15	-1.58	-6.03	-15.40	0.69 KWD	1.15	18.75
Health care	829.21	0.00	0.00	0.00	1.00	-6.26	0.41 KWD	6.19	52.21
Consumer services	719.42	-0.30	0.32	0.40	-7.50	-32.91	0.37 KWD	1.89	12.58
Insurance	988.60	0.84	0.21	2.11	3.48	3.64	0.36 KWD	0.86	7.81
Consumer goods	757.04	-2.75	-5.74	-4.82	2.81	18.81	0.24 KWD	1.60	28.62
Oil and Gas	1,109.99	0.17	2.71	1.24	1.72	-10.35	0.23 KWD	1.50	10.15
Technology	501.25	-1.29	0.88	0.88	1.32	-2.68	0.01 KWD	0.57	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	8,079.74	-0.12	0.43	1.75	11.84	-3.69	9,090 SAR	6.05	26.54
Qatar (QE Index)	9,712.73	-0.49	-1.05	-1.14	8.16	-6.64	516 QAR	1.68	71.36
Dubai (DFMGI)	2,273.62	-0.63	-0.40	1.26	10.09	-17.77	246 AED	29.39	10.72
Abu Dhabi (ADI)	4,508.82	-0.24	-0.95	-0.23	5.20	-11.17	672 AED	4.40	14.88
Bahrain (BAX)	1,394.58	-0.55	-1.11	0.99	9.16	-13.39	15 BHD	1.48	12.81
MUSCAT SE INDEX	3,687.06	-0.38	-1.57	-2.25	4.87	-7.38	4 OMR	0.76	11.16
Developed Markets									
MSCI World Index	2,354.41	-2.23	-1.88	-4.12	6.93	-0.17			
U.S. (S&P 500)	3,331.84	-2.78	-2.78	-4.81	7.47	3.13			
U.K. (FTSE 100)	5,994.97	1.09	3.38	0.53	-2.83	-20.52			
Japan (Topix)	1,605.40	-0.96	-0.69	-0.79	2.99	-6.74			
Emerging Markets									
MSCI EM Index	1,087.51	-0.65	-1.09	-1.27	9.29	-2.44			
China (SSE Composite)	3,254.63	-1.86	-3.00	-4.15	9.04	6.70			
India (Sensex)	38,193.92	-0.45	-0.39	-1.09	9.43	-7.38			



What Move the GCC markets , Oil Prices

Oil futures clawed back some of the losses they sustained in the previous session, but a rebound in COVID-19 cases in some countries undermined hopes for a steady recovery in global demand.

Prices were pressured by extended declines in the U.S. equities market and by a report showing U.S. job growth slowed further in August as financial assistance from the government ran out. Brent crude was up 44 cents, or 1.1%, at \$40.22 a barrel after dropping more than 5% on Tuesday to fall below \$40 a barrel for the first time since June.

Kuwait Market

The market are closed today down by -0.03% , concern around a slow of local economic recovery from the COVID-19 pandemic added to worries about weak oil demand. resurgence of the number of cases and the fear from second wave ,

Saudi Market

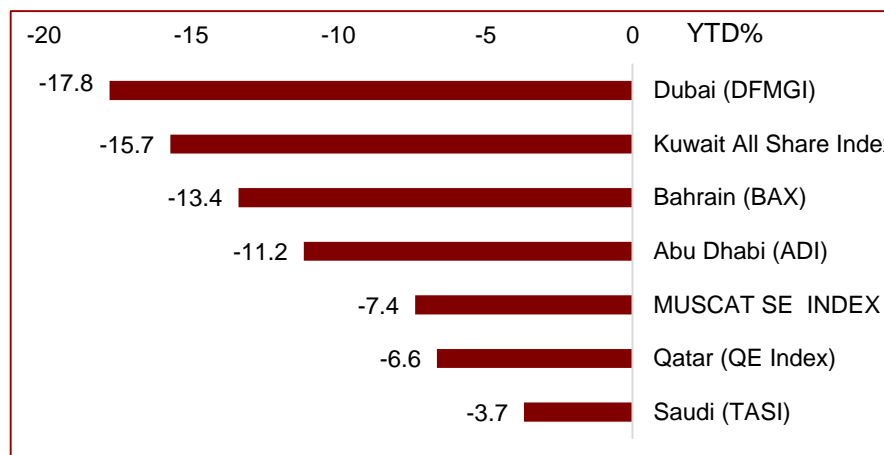
The Market closed today down by -0.12% , linked to the slow economic recovery over the globe and re-opening the global economy and oil prices over \$40 a barrel

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	0.857	0.71	-0.81	-0.35	4.38	-15.90	5.83 KWD	1.64	20.43
KFH	0.624	0.00	-0.64	-0.32	1.96	-15.36	4.79 KWD	2.54	23.94
Zain	0.572	-0.17	-1.04	-3.05	3.06	-4.67	2.48 KWD	2.02	12.19
BOUBYAN BANK	0.596	0.34	2.05	3.11	12.03	-2.37	1.80 KWD	3.15	35.78
Agility	0.623	0.32	-0.48	-0.16	-2.39	-12.41	1.26 KWD	1.07	18.65
Saudi Arabia									
ARAMCO	35.80	-0.42	-0.56	0.70	10.15	1.56	7,190.19 SAR	7.01	29.46
SABIC	88.00	0.00	-2.00	0.00	-0.11	-6.28	264.01 SAR	1.61	0.00
STC	98.20	-0.10	0.51	2.29	-0.81	-3.54	196.61 SAR	3.12	18.18
AL-RAJHI BANK	66.20	0.00	0.30	2.00	16.96	1.22	165.50 SAR	3.19	16.87
NCB	37.00	0.00	-0.27	-0.54	-0.67	-24.87	111.00 SAR	1.51	10.37
United Arab Emirates									
ETISALAT.AD	16.50	-0.48	-1.20	-0.24	0.12	0.98	144.19 AED	3.18	16.36
FAB.AD	11.38	-0.35	-1.38	-0.52	1.42	-24.80	124.71 AED	1.28	11.91
EMIRATES NBD	10.70	-2.73	-0.93	-0.93	20.77	-17.69	69.48 AED	0.85	6.11
DB ISLAMIC BK	4.37	0.69	2.10	6.59	14.40	-20.69	31.42 AED	0.86	7.60
EMAAR PROPERT	2.93	0.00	-2.01	1.74	7.33	-27.11	20.98 AED	0.38	4.12
Qatar									
QNB	17.68	-0.45	-1.72	-1.72	1.73	-14.08	164.04 QAR	1.81	12.74
INDUSTRIES QAT	9.95	-0.50	-0.99	1.42	29.94	-2.72	60.50 QAR	1.87	37.81
QA ISLAMIC BK	15.90	0.00	-0.62	-0.62	0.95	3.72	37.57 QAR	1.81	13.18
MASRAF AL RAYA	4.10	-1.13	-1.60	-1.44	7.59	3.79	31.10 QAR	2.34	14.24
MESAIIEED PETRO	2.09	-0.67	-2.15	-1.23	3.66	-16.57	26.45 QAR	1.72	25.89
OMAN									
BANK MUSCAT	0.386	-1.03	-1.03	-3.02	14.88	-6.61	1.27 OMR	0.65	7.96
OMANTEL	0.620	0.00	-0.64	-1.27	-3.12	0.65	0.47 OMR	0.88	6.79
BANK DHOFAR	0.111	0.00	-0.89	0.00	5.71	-9.76	0.33 QAR	0.49	21.76
NAT BANK OF OMAN	0.175	-2.86	-4.49	-4.49	-2.30	-7.61	0.28 QAR	0.54	7.35
OMINVEST	0.332	0.00	0.61	-0.60	-2.35	0.61	0.27 QAR	1.07	6.31



Leading Sector Performance

Kuwait

The market are down today by -0.03 % The leading sector bottom performance indices today are Consumer goods -2.75 % Technology -1.29 % Consumer services -0.3 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 18.81 % while the bottom sector performance is Consumer services by -32.91 %

Telecommunication sector are down today by -0.02 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by +9.74 %

KSA

Saudi Armco are have negative performance today by -0.42 %, SABIC flat performance today 0 %

STC are have negative performance today by -0.1 %, Al Rajhi Bank flat performance today 0 %

UAE

ETISALAT AD are down today by -0.48%, still outperform the market performance and act defensively with COVID19

Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
26-Aug-20	16.56%	11.44%	0.07%	0.34%	0.33%	3.57%	3.36%	7.52%	3.42%	2.93%
2-Sep-20	16.63%	11.63%	0.07%	0.33%	0.32%	3.62%	3.45%	7.66%	3.40%	2.93%

End of Report

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