



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

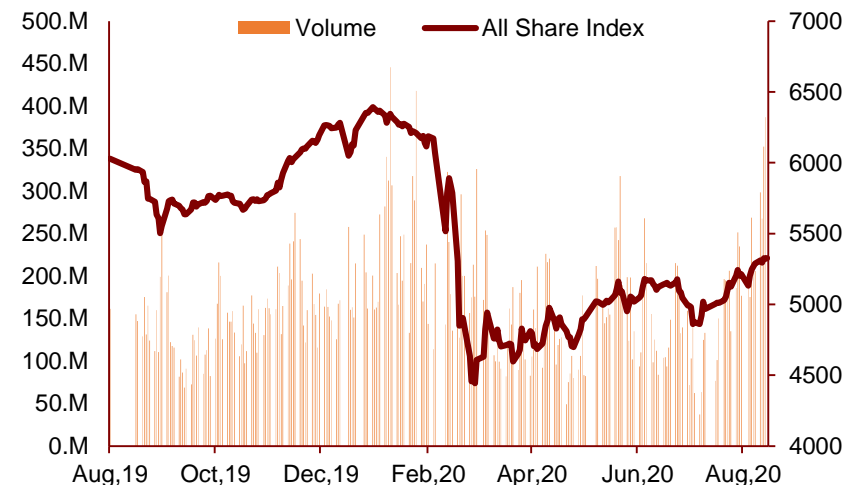
Thursday, September 3, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	5,325.95	0.08	0.70	0.60	3.81	-15.23	30.85 KWD	1.77	18.24
Kuwait Premier Index	5,865.11	-0.16	0.21	0.18	4.60	-15.92	22.64 KWD	1.90	19.65
Kuwait Main Index	4,260.11	0.77	2.11	1.80	1.67	-13.25	8.21 KWD	1.40	14.37
Kuwait Sector									
Banking	1,236.79	-0.16	0.58	0.34	6.61	-16.58	18.31 KWD	1.95	19.23
Telecom	1,053.90	-0.27	-1.83	-1.57	1.70	-5.62	3.23 KWD	1.89	12.78
Industrials	778.48	0.57	1.77	1.64	-2.23	-16.07	2.78 KWD	1.28	20.31
Financial services	912.57	1.88	4.94	4.25	5.14	-15.62	2.30 KWD	0.94	7.69
Real estate	885.12	-0.17	0.42	1.32	-0.91	-16.39	1.90 KWD	0.99	22.96
Basic materials	777.19	-0.85	-0.39	-0.44	-4.93	-14.41	0.69 KWD	1.15	18.84
Health care	829.21	0.00	0.00	0.00	1.00	-6.26	0.41 KWD	6.19	52.21
Consumer services	717.09	0.58	-0.21	0.08	-7.80	-33.12	0.37 KWD	1.86	12.27
Insurance	986.51	0.83	2.60	1.90	3.26	3.42	0.36 KWD	0.86	7.78
Consumer goods	803.17	0.00	-0.55	0.98	9.08	26.05	0.25 KWD	1.67	29.67
Oil and Gas	1,080.73	0.39	-1.89	-1.43	-0.96	-12.72	0.23 KWD	1.47	9.78
Technology	496.88	0.74	0.44	0.00	0.44	-3.53	0.01 KWD	0.56	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	8,045.09	0.39	1.39	1.31	11.36	-4.10	9,084 SAR	6.06	26.18
Qatar (QE Index)	9,836.22	0.25	-0.91	-0.53	8.83	-6.07	519 QAR	1.69	67.03
Dubai (DFMGI)	2,282.70	1.02	0.59	1.67	10.53	-17.44	245 AED	33.85	10.74
Abu Dhabi (ADI)	4,552.20	0.11	0.38	0.73	6.22	-10.32	678 AED	4.38	14.86
Bahrain (BAX)	1,410.20	0.85	2.12	2.12	10.38	-12.42	15 BHD	1.44	13.55
MUSCAT SE INDEX	3,746.19	-0.61	0.23	-0.68	6.55	-5.90	4 OMR	0.76	11.36
Developed Markets									
MSCI World Index	2,494.10	1.09	1.52	1.57	13.28	5.75			
U.S. (S&P 500)	3,580.84	0.00	2.08	2.30	15.50	10.84			
U.K. (FTSE 100)	5,964.82	0.40	0.02	0.02	-3.32	-20.92			
Japan (Topix)	1,631.24	0.48	1.64	0.81	4.65	-5.24			
Emerging Markets									
MSCI EM Index	1,118.90	-0.10	-0.24	1.58	12.44	0.38			
China (SSE Composite)	3,384.98	-0.58	-0.55	-0.31	13.41	10.98			
India (Sensex)	38,990.94	-0.24	-1.21	0.94	11.67	-5.49			



What Move the GCC markets , Oil Prices

Oil prices extended losses on Thursday, falling to their lowest point since early August, as worries about weaker U.S. gasoline demand and a sluggish economic recovery from the COVID-19 pandemic dented sentiment.

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 fell \$1.01, or 2.27%, to \$43.42 per barrel.**

Kuwait Market

The market are closed today up by +0.08% , while closing this week in positive territory by +0.70% , 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 +0.39% , also closed this week up by +1.39% linked to the effect of the re-opining the local economy also the oil performance above 45\$ with the production cuts.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



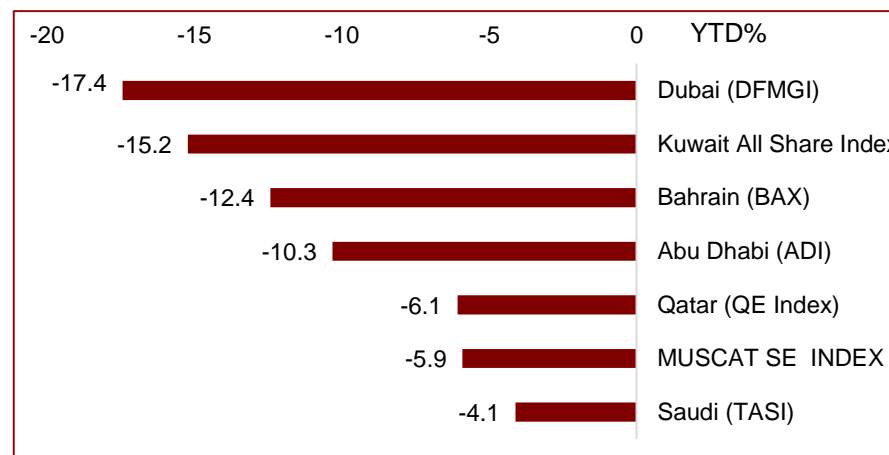
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.864	-0.23	-0.23	0.47	5.24	-15.21	5.92 KWD	1.67	20.79
KFH	0.628	-0.32	0.32	0.32	2.61	-14.82	4.82 KWD	2.56	24.17
Zain	0.578	-0.34	-2.36	-2.03	4.14	-3.67	2.50 KWD	2.04	12.34
BOUBYAN BANK	0.584	0.17	2.46	1.04	9.77	-4.34	1.77 KWD	3.10	35.12
Agility	0.626	0.00	0.16	0.32	-1.92	-11.99	1.27 KWD	1.08	18.80
Saudi Arabia									
ARAMCO	36.00	0.00	2.86	1.27	10.77	2.13	7,200.00 SAR	7.02	29.05
SABIC	89.80	0.45	1.70	2.05	1.93	-4.37	268.20 SAR	1.64	0.00
STC	97.70	0.00	1.35	1.77	-1.31	-4.03	195.40 SAR	3.11	17.84
AL-RAJHI BANK	66.00	2.33	0.30	1.69	16.61	0.92	161.25 SAR	3.11	16.18
NCB	37.10	0.00	-1.20	-0.27	-0.40	-24.67	111.30 SAR	1.52	10.30
United Arab Emirates									
ETISALAT.AD	16.72	0.12	-1.07	0.97	1.33	2.20	145.41 AED	3.20	16.48
FAB.AD	11.56	0.35	1.23	0.87	2.85	-23.75	126.24 AED	1.29	12.01
EMIRATES NBD	10.80	-0.92	-2.70	0.00	21.90	-16.92	68.22 AED	0.84	6.06
DB ISLAMIC BK	4.28	3.13	3.38	4.39	12.04	-22.32	30.99 AED	0.85	7.26
EMAAR PROPERT	2.99	2.75	2.05	3.82	9.52	-25.62	21.41 AED	0.38	4.09
Qatar									
QNB	18.00	0.61	-1.96	0.00	3.51	-12.58	166.26 QAR	1.83	12.84
INDUSTRIES QAT	10.10	0.00	2.54	2.43	31.24	-1.75	61.11 QAR	1.89	38.19
QA ISLAMIC BK	16.00	0.63	-1.73	-0.56	1.02	3.78	37.81 QAR	1.82	13.18
MASRAF AL RAYA	4.18	0.77	-0.33	0.02	9.19	5.33	31.33 QAR	2.36	14.23
MESAIEED PETRO	2.14	0.61	-0.47	0.19	5.15	-15.38	26.89 QAR	1.75	26.16
OMAN									
BANK MUSCAT	0.390	-1.50	1.55	-1.00	17.26	-4.68	1.28 OMR	0.66	8.16
OMANTEL	0.624	0.00	1.30	-0.64	-2.50	1.30	0.47 OMR	0.88	6.83
BANK DHOFAR	0.112	-0.89	0.00	0.00	5.71	-9.76	0.33 QAR	0.49	21.96
NAT BANK OF OMAN	0.179	0.00	-0.56	0.56	2.87	-2.72	0.29 QAR	0.55	7.52
OMINVEST	0.330	-1.20	-1.79	-1.20	-2.94	0.00	0.27 QAR	1.06	6.35

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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Leading Sector Performance

Kuwait

The market are up today by +0.08 %The leading sector best performance indices today are Financial services 1.88 % Insurance 0.83 % Technology 0.74 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 26.05 % while the bottom sector performance is Consumer services by -33.12 %.

Telecommunication sector are down today by -0.27 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by +9.61 %

KSA

Saudi Armco are flat performance today 0 %, SABIC have positive performance today by +0.45 %

STC are flat performance today 0 %, Al Rajhi Bank have positive performance today by +2.33 %

UAE

ETISALAT AD are up today by 0.12%, still outperform the market performance and act defensively with COVID19



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