



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

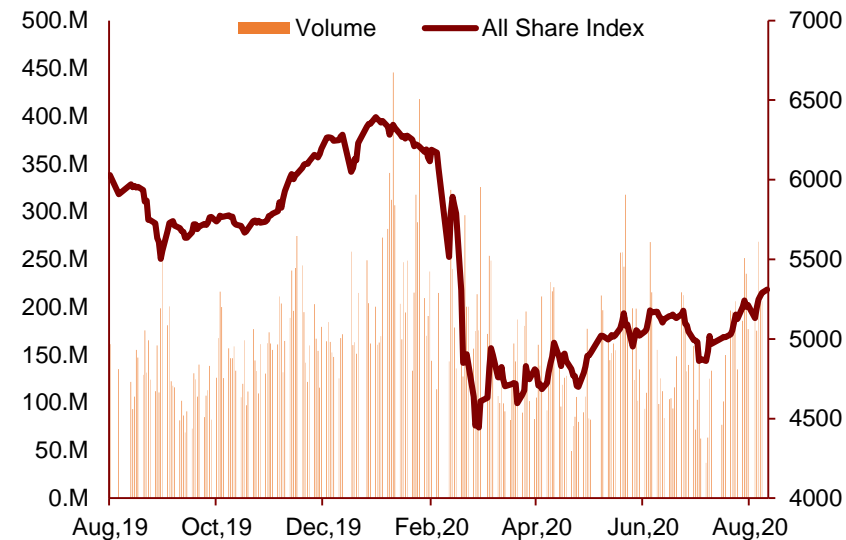
Sunday, August 30, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,310.68	0.41	1.80	6.81	3.43	-15.53	30.70 KWD	1.76	18.20
Kuwait Premier Index	5,874.51	0.37	0.28	8.39	4.68	-15.86	22.60 KWD	1.89	19.55
Kuwait Main Index	4,194.04	0.52	0.47	2.59	0.04	-14.64	8.10 KWD	1.38	14.43
Kuwait Sector									
Banking	1,235.52	0.47	0.39	9.84	6.41	-16.73	18.21 KWD	1.92	19.09
Telecom	1,073.10	-0.04	-0.15	6.13	3.45	-4.00	3.29 KWD	1.93	12.98
Industrials	767.04	0.28	0.15	-0.97	-3.79	-17.40	2.74 KWD	1.24	20.36
Financial services	878.85	1.06	1.14	5.17	1.33	-18.68	2.24 KWD	0.93	7.85
Real estate	885.13	0.42	0.16	4.37	-1.17	-16.61	1.90 KWD	1.01	22.76
Basic materials	787.50	0.93	1.09	3.44	-3.53	-13.15	0.70 KWD	1.16	18.70
Health care	829.21	0.00	0.00	0.00	1.00	-6.26	0.41 KWD	6.19	52.21
Consumer services	713.38	-0.73	-0.75	-5.56	-8.29	-33.48	0.37 KWD	1.87	12.49
Insurance	961.63	0.02	0.02	2.50	0.66	0.81	0.35 KWD	0.84	7.71
Consumer goods	801.52	-0.76	-0.25	11.35	9.41	26.43	0.25 KWD	1.66	29.81
Oil and Gas	1,097.75	-0.35	-0.54	0.03	0.41	-11.51	0.23 KWD	1.53	10.21
Technology	480.15	-2.94	-2.94	3.13	-2.94	-6.78	0.01 KWD	0.54	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	7,983.82	0.62	0.62	7.03	10.52	-4.83	8,868 SAR	5.89	25.96
Qatar (QE Index)	9,922.52	0.40	1.61	5.94	10.29	-4.81	522 QAR	1.71	61.44
Dubai (DFMGI)	2,261.47	-0.34	0.65	10.27	9.50	-18.21	244 AED	24.18	10.79
Abu Dhabi (ADI)	4,537.53	0.05	0.82	5.41	5.87	-10.60	679 AED	4.43	14.73
Bahrain (BAX)	1,380.89	0.57	1.89	7.00	8.08	-14.24	15 BHD	1.35	13.42
MUSCAT SE INDEX	3,751.52	0.38	3.37	5.14	6.69	-5.77	4 OMR	0.77	11.18
Developed Markets									
MSCI World Index	2,456.86	0.58	2.71	6.59	11.58	4.17			
U.S. (S&P 500)	3,508.01	0.67	3.26	7.24	13.15	8.58			
U.K. (FTSE 100)	5,963.57	-0.61	-0.64	1.12	-3.34	-20.93			
Japan (Topix)	1,604.87	-0.68	0.05	7.27	2.96	-6.77			
Emerging Markets									
MSCI EM Index	1,121.60	0.39	2.72	3.96	12.71	0.62			
China (SSE Composite)	3,403.81	1.60	0.68	2.83	14.04	11.60			
India (Sensex)	39,467.31	0.90	2.69	4.95	13.04	-4.33			



What Move the GCC markets ,

Oil Prices

Oil prices inched lower on Sunday as Hurricane Laura passed the heart of the U.S. oil industry in Louisiana and Texas without causing any widespread damage and companies were beginning to restart operations.

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 futures for October, set to expire, were down 5 cents to \$45.04 a barrel**

Kuwait Market

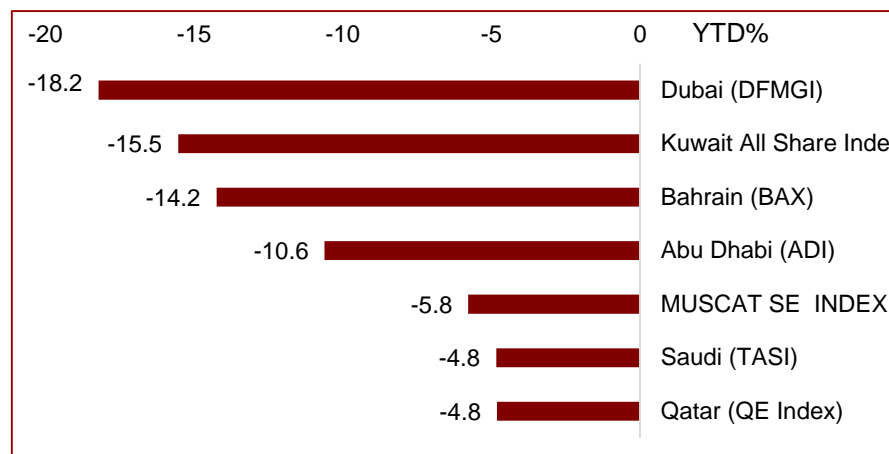
The market are closed today up by +0.41% due to re-opening the local economy and the effect of demand recovery and production cut effect on the oil prices also the positive effect on inflows from MSCI in Nov 2020 also new companies traded and the expected positive effect to the market liquidity.

Saudi Market

The Market closed up today by +0.62% linked to the effect of the re-opining the local economy also the oil performance above 45\$ with the production cuts.



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	0.864	-0.23	3.97	9.63	5.36	-15.12	5.92 KWD	1.67	20.79
KFH	0.632	0.96	2.27	9.17	3.10	-14.41	4.85 KWD	2.57	24.02
Zain	0.592	0.00	0.17	7.45	6.49	-1.50	2.56 KWD	2.09	12.60
BOUBYAN BANK	0.568	-0.35	0.89	6.97	6.77	-6.96	1.72 KWD	3.01	34.33
Agility	0.626	0.16	1.30	-2.34	-2.08	-12.13	1.27 KWD	1.08	18.77
Saudi Arabia									
ARAMCO	35.10	0.29	2.78	6.36	8.00	-0.43	7,000.00 SAR	6.82	28.76
SABIC	88.90	0.68	0.57	0.00	0.91	-5.32	264.90 SAR	1.62	0.00
STC	96.60	0.21	0.00	-0.62	-2.42	-5.11	192.80 SAR	3.06	18.03
AL-RAJHI BANK	65.90	0.15	1.54	11.88	16.43	0.76	164.50 SAR	3.17	16.84
NCB	37.60	0.13	-2.59	3.58	0.94	-23.65	112.65 SAR	1.54	10.68
United Arab Emirates									
ETISALAT.AD	16.76	-0.83	-1.06	0.72	1.58	2.45	145.76 AED	3.21	16.67
FAB.AD	11.54	1.05	1.23	5.68	2.67	-23.88	126.02 AED	1.29	11.91
EMIRATES NBD	11.00	-0.90	3.29	24.43	24.15	-15.38	69.48 AED	0.85	6.17
DB ISLAMIC BK	4.13	-0.24	1.72	9.55	8.12	-25.05	29.90 AED	0.82	7.25
EMAAR PROPERT	2.93	0.00	0.69	14.01	7.33	-27.11	20.98 AED	0.38	4.12
Qatar									
QNB	18.33	-0.16	-0.92	1.83	5.41	-10.98	169.30 QAR	1.87	13.17
INDUSTRIES QAT	10.06	2.13	11.88	28.77	30.85	-2.04	60.86 QAR	1.88	37.24
QA ISLAMIC BK	16.17	-0.12	0.06	0.37	2.60	5.41	38.21 QAR	1.84	13.42
MASRAF AL RAYA	4.19	0.12	0.96	6.40	9.69	5.81	31.43 QAR	2.36	14.37
MESAIEED PETRO	2.14	0.05	0.52	2.40	5.69	-14.94	26.82 QAR	1.74	26.25
OMAN									
BANK MUSCAT	0.394	1.53	2.59	13.14	17.86	-4.19	1.29 OMR	0.66	8.00
OMANTEL	0.616	0.00	0.65	1.32	-3.75	0.00	0.46 OMR	0.87	6.75
BANK DHOFAR	0.111	0.00	-0.90	10.00	4.76	-10.57	0.33 QAR	0.48	21.57
NAT BANK OF OMAN	0.180	0.00	0.56	6.51	3.45	-2.17	0.29 QAR	0.55	7.56
OMINVEST	0.334	0.00	0.00	-2.91	-1.76	1.21	0.27 QAR	1.07	6.35



Leading Sector Performance

Kuwait

The market are up today by +0.41 % The leading sector best performance indices today are Financial services 1.06 % Basic materials 0.93 % Banking 0.47 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 26.43 % while the bottom sector performance is Consumer services by -33.48 %

Telecommunication sector are down today by -0.04 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by +11.53 %

KSA

Saudi Armco are have positive performance today by +0.29 %, SABIC have positive performance today by +0.68 %

STC are have positive performance today by +0.21 %, Al Rajhi Bank have positive performance today by +0.15 %

UAE

ETISALAT AD are down today by -0.83% , still outperform the market performance and act defensively with COVID19

Summary - Absolute change in Foreign Ownership

	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
19-Aug-20	16.56%	11.38%	0.07%	0.34%	0.33%	3.58%	3.34%	7.52%	3.43%	2.92%
26-Aug-20	16.56%	11.44%	0.07%	0.34%	0.33%	3.57%	3.36%	7.52%	3.42%	2.93%

End of Report

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document is confidential and may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed and others authorized to receive it.



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw