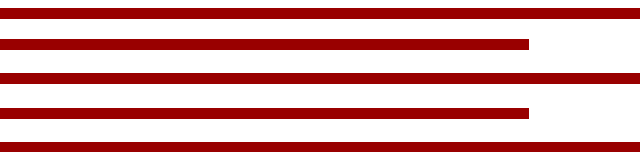


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

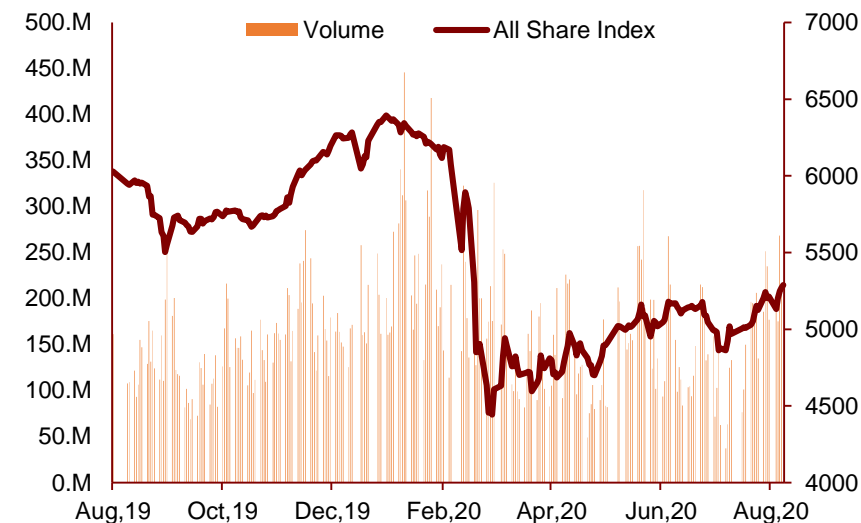
Thursday, August 27, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	5,289.16	0.39	1.46	6.46	3.09	-15.81	30.52 KWD	1.75	18.15
Kuwait Permier Index	5,853.06	0.42	1.71	8.08	4.39	-16.10	22.48 KWD	1.88	19.46
Kuwait Main Index	4,172.24	0.30	0.76	2.11	-0.43	-15.04	8.04 KWD	1.37	14.48
Kuwait Sector									
Banking	1,229.69	0.52	1.91	9.41	5.99	-17.06	18.09 KWD	1.91	18.98
Telecom	1,073.55	0.28	0.54	6.28	3.60	-3.86	3.28 KWD	1.93	13.03
Industrials	764.92	0.10	0.81	-1.12	-3.93	-17.53	2.73 KWD	1.25	20.31
Financial services	869.61	0.52	2.18	3.99	0.19	-19.59	2.21 KWD	0.93	8.04
Real estate	881.42	0.28	0.45	4.20	-1.33	-16.74	1.89 KWD	1.01	22.77
Basic materials	780.24	-0.89	-1.15	2.33	-4.56	-14.08	0.70 KWD	1.16	18.86
Health care	829.21	0.00	0.00	0.00	1.00	-6.26	0.41 KWD	6.17	52.21
Consumer services	718.60	-0.09	-0.79	-4.85	-7.60	-32.98	0.37 KWD	1.83	12.53
Insurance	961.48	0.22	2.69	2.48	0.64	0.80	0.35 KWD	0.84	7.70
Consumer goods	807.62	0.25	2.67	11.63	9.68	26.75	0.25 KWD	1.67	29.74
Oil and Gas	1,101.58	0.60	0.44	0.58	0.95	-11.03	0.23 KWD	1.53	10.08
Technology	494.70	7.94	12.21	6.25	0.00	-3.95	0.01 KWD	0.51	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	7,934.43	-0.26	1.17	6.37	9.83	-5.42	8,854 SAR	5.87	25.97
Qatar (QE Index)	9,882.93	-0.16	1.09	5.39	9.72	-5.30	521 QAR	1.71	61.56
Dubai (DFMGI)	2,269.27	-0.86	1.00	10.65	9.88	-17.92	248 AED	28.97	10.83
Abu Dhabi (ADI)	4,535.15	0.12	0.77	5.35	5.82	-10.65	676 AED	4.40	14.83
Bahrain (BAX)	1,380.89	0.57	1.89	7.00	8.08	-14.24	15 BHD	1.33	13.39
MUSCAT SE INDEX	3,737.47	-0.28	2.99	4.75	6.30	-6.12	4 OMR	0.77	11.24
Developed Markets									
MSCI World Index	2,446.05	0.95	2.25	6.12	11.09	3.71			
U.S. (S&P 500)	3,478.73	1.02	2.40	6.35	12.21	7.67			
U.K. (FTSE 100)	6,046.64	0.02	0.75	2.52	-2.00	-19.83			
Japan (Topix)	1,615.89	-0.53	0.74	8.01	3.66	-6.13			
Emerging Markets									
MSCI EM Index	1,119.34	0.41	2.52	3.75	12.49	0.42			
China (SSE Composite)	3,350.11	0.61	-0.90	1.21	12.24	9.84			
India (Sensex)	39,113.47	0.10	1.87	4.11	12.14	-5.09			



What Move the GCC markets ,

Oil Prices

Oil prices were broadly stable on Thursday as a massive hurricane in the Gulf of Mexico made landfall in the heart of the U.S. oil industry, forcing oil rigs and refineries to shut down.

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, which expire on Friday, fell 18 cents to trade at \$45.46 per barrel**

Kuwait Market

The market are closed today up by +0.39% 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 down today by -0.21% ,and +1.17% in weekly close 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



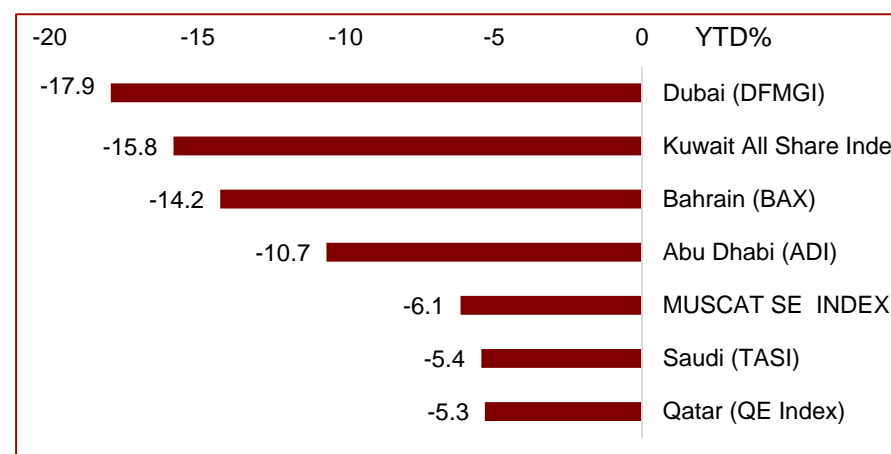
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.866	1.05	4.09	9.76	5.48	-15.02	5.87 KWD	1.65	20.58
KFH	0.626	0.32	1.46	8.30	2.29	-15.09	4.79 KWD	2.54	23.94
Zain	0.592	0.34	0.34	7.64	6.67	-1.33	2.55 KWD	2.08	12.55
BOUBYAN BANK	0.570	0.18	1.24	7.34	7.14	-6.63	1.72 KWD	3.02	34.27
Agility	0.625	-0.16	1.30	-2.34	-2.08	-12.13	1.27 KWD	1.08	18.80
Saudi Arabia									
ARAMCO	35.00	0.29	2.49	6.06	7.69	-0.71	6,979.44 SAR	6.80	28.80
SABIC	88.30	-0.23	-0.11	-0.67	0.23	-5.96	265.48 SAR	1.62	0.00
STC	96.40	-0.10	-0.21	-0.82	-2.63	-5.30	192.98 SAR	3.07	18.03
AL-RAJHI BANK	65.80	-0.30	1.39	11.71	16.25	0.61	164.99 SAR	3.18	16.84
NCB	37.55	-1.44	-2.72	3.44	0.81	-23.76	114.29 SAR	1.56	10.68
United Arab Emirates									
ETISALAT.AD	16.90	0.24	-0.94	0.84	1.70	2.57	146.63 AED	3.23	16.63
FAB.AD	11.42	0.53	-0.35	4.03	1.07	-25.07	124.05 AED	1.27	11.84
EMIRATES NBD	11.10	-2.20	4.23	25.57	25.28	-14.62	71.69 AED	0.88	6.31
DB ISLAMIC BK	4.14	0.49	1.97	9.81	8.38	-24.86	29.83 AED	0.82	7.21
EMAAR PROPERT	2.93	-1.68	0.69	14.01	7.33	-27.11	21.34 AED	0.38	4.19
Qatar									
QNB	18.36	0.16	-1.08	1.67	5.23	-11.12	169.30 QAR	1.87	13.15
INDUSTRIES QAT	9.85	-1.50	9.38	25.90	27.92	-4.23	60.50 QAR	1.87	37.81
QA ISLAMIC BK	16.19	0.06	0.25	0.56	2.79	5.61	38.23 QAR	1.84	13.41
MASRAF AL RAYA	4.19	0.53	0.84	6.27	9.56	5.68	31.22 QAR	2.35	14.30
MESAIEED PETRO	2.13	0.00	0.05	1.92	5.20	-15.34	26.81 QAR	1.74	26.25
OMAN									
BANK MUSCAT	0.388	-2.49	0.52	10.86	15.48	-6.13	1.31 OMR	0.67	8.20
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	-1.79	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	-1.18	-2.91	-1.76	1.21	0.27 QAR	1.07	6.35

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

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Leading Sector Performance

Kuwait

The market are up today by +0.39 % The leading sector best performance indices today are Technology 7.94 % Oil and Gas 0.6 % Financial services 0.52 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 26.75 % while the bottom sector performance is Consumer services by -32.98 %

Telecommunication sector are up today by +0.07 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by +12.01 %

KSA

Saudi Armco are have positive performance today by +0.29 %, SABIC have negative performance today by -0.23 %

STC are have negative performance today by -0.1 %, Al Rajhi Bank have negative performance today by -0.3 %

UAE

ETISALAT AD are down today by +0.24% , still outperform the market performance and act defensively with COVID19



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