



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

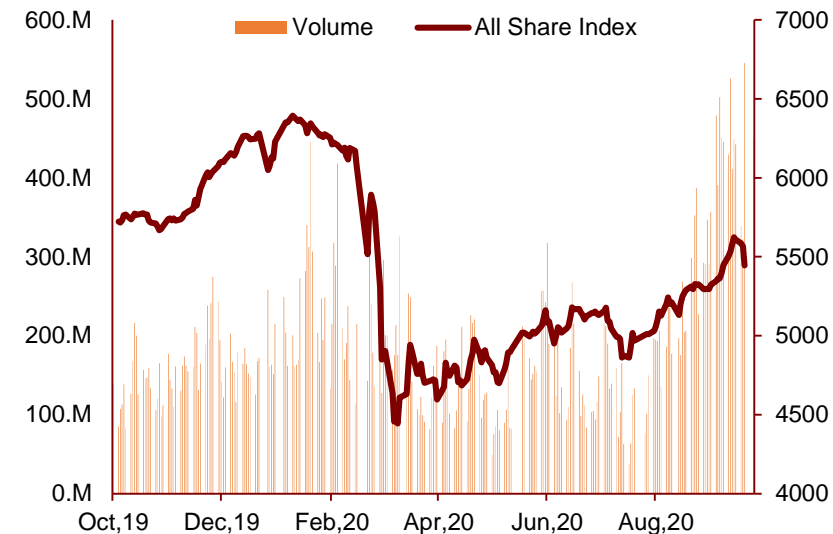
Sunday, October 4, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	5,594.00	2.73	-0.26	5.66	9.03	-10.96	32.40 KWD	1.88	18.39
Kuwait Premier Index	6,205.27	3.06	-0.26	5.99	10.67	-11.05	23.92 KWD	2.01	20.18
Kuwait Main Index	4,379.55	1.77	-0.27	4.65	4.52	-10.82	8.48 KWD	1.51	13.33
NIC 50	6,862.10	2.92	2.84	2.93	10.91	-7.99	27.54 KWD	1.48	14.96
Kuwait Sector									
Banking	1,312.43	3.22	3.22	3.22	3.22	-11.48	19.41 KWD	2.11	19.71
Telecom	1,067.63	1.55	1.55	1.55	1.55	-4.39	3.27 KWD	1.91	12.77
Industrials	820.31	2.82	2.82	2.82	2.82	-11.56	2.93 KWD	1.33	20.77
Financial services	929.59	2.57	2.57	2.57	2.57	-14.04	2.34 KWD	0.93	6.78
Real estate	966.74	2.36	2.36	2.36	2.36	-8.68	2.08 KWD	1.13	20.64
Basic materials	789.49	1.57	1.57	1.57	1.57	-13.06	0.70 KWD	1.23	18.75
Health care	820.13	0.00	0.00	0.00	0.00	-7.28	0.41 KWD	6.22	51.97
Consumer services	757.53	2.27	2.27	2.27	2.27	-29.35	0.39 KWD	1.96	12.98
Insurance	1,051.01	0.28	0.28	0.28	0.28	10.18	0.39 KWD	0.94	8.38
Consumer goods	769.64	0.41	0.41	0.41	0.41	20.79	0.24 KWD	1.58	28.18
Oil and Gas	1,141.45	0.41	0.41	0.41	0.41	-7.81	0.24 KWD	1.68	10.68
Technology	531.08	3.69	3.69	3.69	3.69	3.11	0.01 KWD	0.59	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	8,177.76	-1.41	-1.41	-1.46	-1.46	-2.52	9,101 SAR	6.01	26.70
Qatar (QE Index)	9,953.51	-0.52	1.73	-0.33	-0.33	-4.49	532 QAR	1.70	99.33
Dubai (DFMGI)	2,244.63	-0.93	-0.34	-1.27	-1.27	-18.82	242 AED	20.42	10.72
Abu Dhabi (ADI)	4,492.90	0.02	0.58	-0.56	-0.56	-11.48	677 AED	4.62	15.33
Bahrain (BAX)	1,436.29	0.27	-0.97	0.13	0.13	-10.80	16 BHD	1.66	13.03
MUSCAT SE INDEX	3,595.11	-0.54	-0.88	-4.69	2.25	-9.70	4 OMR	0.74	10.89
Developed Markets									
MSCI World Index	2,362.41	-0.74	1.53	-0.21	-0.21	0.17			
U.S. (S&P 500)	3,348.44	-0.96	1.52	-0.43	-0.43	3.64			
U.K. (FTSE 100)	5,902.12	0.39	1.02	0.61	0.61	-21.75			
Japan (Topix)	1,609.22	-1.00	-1.53	-1.00	-1.00	-6.51			
Emerging Markets									
MSCI EM Index	1,081.71	-0.29	2.13	-0.03	-0.03	-2.96			
China (SSE Composite)	3,218.05	-0.20	-0.04	-5.23	7.82	5.51			
India (Sensex)	38,697.05	1.65	3.50	1.65	1.65	-6.20			



What Move the GCC markets , Oil Prices

Oil prices fell 3% after U.S. President Donald Trump tested positive for COVID-19, roiling risky assets, and as rising global crude output threatens to overwhelm the market's weak recovery.

The International Energy Agency (IEA) on Tuesday trimmed its 2020 outlook by 200,000 barrels per day (bpd) to 91.7 million bpd, citing caution about the pace of economic recovery. **Brent crude was down \$1.12, or 2.7%, at \$39.81 a barrel.**

Kuwait Market

The market are closed today up by +2.73%, re-opining the local economy also with fear of the second wave Covid19 More than 1 million people have died of Covid-19 as of Tuesday, with fatalities and infections surging in several countries.

Saudi Market

The Market closed today down by -1.41% , linked to the slow economic recovery over the globe and re-opening the global economy and oil prices under \$40 a barrel.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



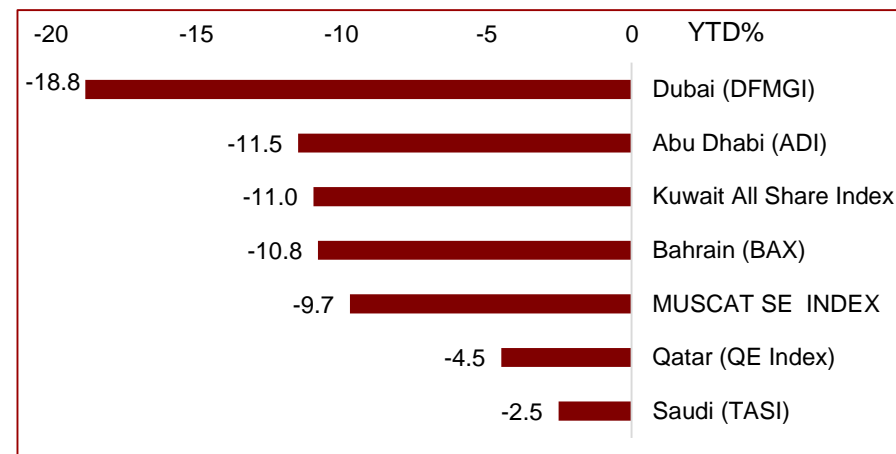
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.895	2.87	0.11	4.07	9.01	-12.17	6.13 KWD	1.73	20.89
KFH	0.689	4.24	-0.58	10.06	12.58	-6.55	5.29 KWD	2.81	25.36
Zain	0.584	1.74	-0.17	-1.02	5.23	-2.67	2.53 KWD	2.06	12.21
BOUBYAN BANK	0.607	2.02	0.50	5.02	14.10	-0.57	1.84 KWD	3.22	35.84
Agility	0.676	2.89	-0.29	8.33	5.91	-4.96	1.37 KWD	1.16	19.74
Saudi Arabia									
ARAMCO	35.10	-1.82	-4.36	-2.23	-2.23	-0.43	7,149.81 SAR	6.97	29.58
SABIC	87.70	-0.90	-1.24	-0.79	-0.79	-6.60	265.49 SAR	1.62	0.00
STC	100.40	-0.40	0.40	0.00	0.00	-1.38	201.59 SAR	3.20	18.76
AL-RAJHI BANK	65.00	-1.37	-2.69	-1.07	-1.07	-0.61	164.75 SAR	3.17	16.76
NCB	37.30	0.13	0.00	0.40	0.40	-24.26	111.75 SAR	1.52	10.41
United Arab Emirates									
ETISALAT.AD	16.64	0.12	0.24	-0.12	-0.12	1.71	144.71 AED	3.19	16.40
FAB.AD	11.14	0.00	0.54	-0.71	-0.71	-26.39	121.65 AED	1.25	11.61
EMIRATES NBD	10.50	0.00	0.48	-1.41	-1.41	-19.23	66.32 AED	0.81	5.83
DB ISLAMIC BK	4.23	-2.08	-0.94	-2.08	-2.08	-23.23	30.63 AED	0.84	7.56
EMAAR PROPERT	2.77	-1.77	-2.81	-0.72	-0.72	-31.09	19.83 AED	0.36	3.96
Qatar									
QNB	17.89	-0.61	3.11	-1.70	-1.70	-13.11	165.24 QAR	1.82	12.92
INDUSTRIES QAT	9.82	-0.84	-1.39	-0.28	-0.28	-4.46	59.42 QAR	1.84	37.45
QA ISLAMIC BK	16.76	0.06	5.08	1.58	1.58	9.33	39.60 QAR	1.90	13.88
MASRAF AL RAYA	4.15	0.07	1.44	-0.26	-0.26	4.77	31.12 QAR	2.34	14.24
MESAIEED PETRO	2.08	-0.33	0.73	0.19	0.19	-17.01	26.17 QAR	1.70	25.71
OMAN									
BANK MUSCAT	0.356	-1.66	-2.73	-10.55	5.95	-13.87	1.16 OMR	0.59	7.39
OMANTEL	0.624	-0.63	0.00	0.00	-1.87	1.95	0.47 OMR	0.89	6.92
BANK DHOFAR	0.105	0.00	0.00	0.00	0.00	-14.63	0.31 QAR	0.46	20.59
NAT BANK OF OMAN	0.170	0.00	0.00	-4.49	-2.30	-7.61	0.28 QAR	0.52	7.14
OMINVEST	0.332	0.00	0.00	0.00	0.00	0.61	0.27 QAR	1.07	6.31

Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
23-Sep-20	16.80%	11.97%	0.07%	0.27%	0.31%	3.77%	3.55%	7.85%	3.55%	2.94%
30-Sep-20	16.84%	12.11%	0.07%	0.18%	0.31%	3.64%	3.60%	7.93%	3.65%	2.94%

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.



Leading Sector Performance

The market are up today by +2.73 % The leading sector best performance indices today are Technology 3.69 % Banking 3.22 % Industrials 2.82 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 20.79 % while the bottom sector performance is Consumer services by -29.35 %.

Telecommunication sector are up today by +1.55 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by +6.57 %.

KSA

Saudi Armco are have negative performance today by -1.82 %, SABIC have negative performance today by -0.9 %.

STC are have negative performance today by -0.4 %, Al Rajhi Bank have negative performance today by -1.37 %

UAE

ETISALAT AD are up by +0.12 , still outperform the market performance in year to date basis and act defensively with COVID19



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