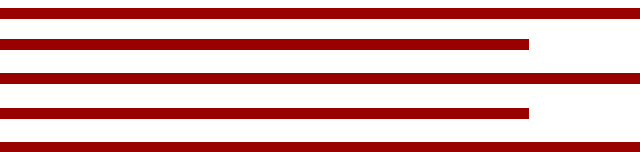
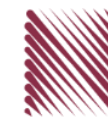


شركة الاستثمارات الوطنية  
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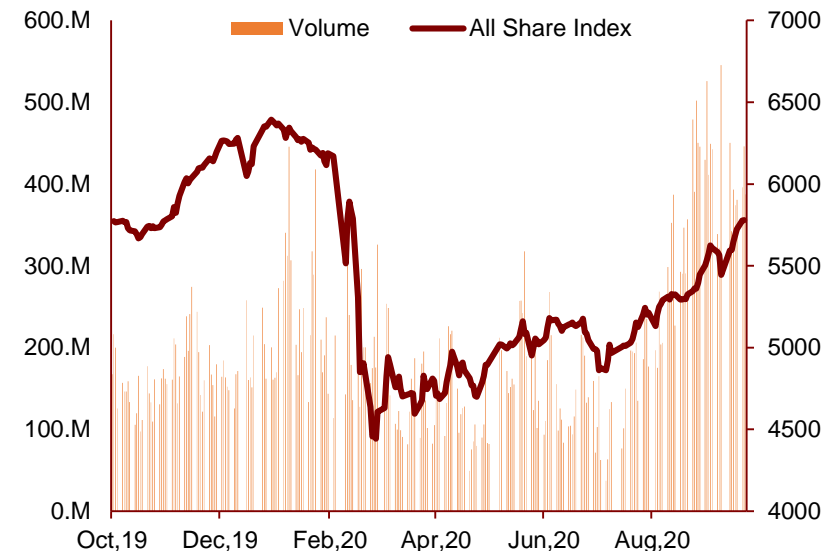
## GCC DAILY MARKET WRAP

Tuesday, October 13, 2020



### Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>		%	%	%	%	%			
Kuwait All Share Index	5,762.04	-0.29	0.65	5.82	5.82	-8.28	33.52 KWD	1.94	19.38
Kuwait Permier Index	6,413.48	-0.40	0.80	6.70	6.70	-7.91	24.89 KWD	2.08	21.40
Kuwait Main Index	4,465.53	0.03	0.69	3.76	3.76	-9.07	8.63 KWD	1.54	13.55
NIC 50	7,074.80	-0.30	0.75	6.62	6.63	-5.14	28.60 KWD	1.57	15.56
<b>Kuwait Sector</b>									
Banking	1,355.91	-0.30	0.89	6.64	6.64	-8.55	20.16 KWD	2.19	20.97
Telecom	1,117.45	-0.88	0.28	6.29	6.29	0.07	3.46 KWD	2.03	13.68
Industrials	843.49	-0.70	-0.57	5.73	5.73	-9.06	3.03 KWD	1.38	21.57
Financial services	959.22	0.98	2.28	5.84	5.84	-11.30	2.39 KWD	0.93	7.07
Real estate	969.01	-0.61	-1.06	2.60	2.60	-8.47	2.09 KWD	1.12	21.19
Basic materials	838.31	0.84	2.49	7.85	7.85	-7.68	0.74 KWD	1.23	19.41
Health care	821.04	0.00	0.11	0.11	0.11	-7.18	0.41 KWD	6.22	52.00
Consumer services	754.93	0.04	0.18	1.92	1.92	-29.59	0.39 KWD	1.89	13.53
Insurance	991.30	-1.07	-1.16	-5.42	-5.42	3.92	0.37 KWD	0.87	8.03
Consumer goods	770.08	0.12	0.85	0.46	0.46	20.86	0.24 KWD	1.57	28.18
Oil and Gas	1,153.94	-0.55	-0.34	1.51	1.51	-6.80	0.24 KWD	1.68	10.64
Technology	522.34	1.12	-0.28	1.99	1.99	1.41	0.01 KWD	0.58	0.00



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>		%	%	%	%	%			
Saudi (TASI)	8,601.07	0.66	2.24	3.64	3.64	2.53	9,226 SAR	6.04	26.71
Qatar (QE Index)	10,056.86	0.00	0.25	0.67	0.67	-3.54	542 QAR	1.72	12.50
Dubai (DFMGI)	2,237.36	0.11	1.04	-1.59	-1.59	-19.08	241 AED	1.25	10.71
Abu Dhabi (ADI)	4,545.18	0.27	0.72	0.60	0.60	-10.45	680 AED	4.61	15.50
Bahrain (BAX)	1,482.24	0.25	1.63	3.33	3.33	-7.95	16 BHD	1.78	13.51
MUSCAT SE INDEX	3,594.65	0.29	-0.26	-0.55	-0.55	-9.71	4 OMR	0.75	10.82
<b>Developed Markets</b>									
MSCI World Index	2,477.92	1.23	1.23	4.67	4.67	5.06			
U.S. (S&P 500)	3,534.22	1.64	1.64	5.09	5.09	9.39			
U.K. (FTSE 100)	5,994.33	-0.12	-0.37	2.19	2.19	-20.53			
Japan (Topix)	1,649.10	0.35	0.10	1.45	1.45	-4.20			
<b>Emerging Markets</b>									
MSCI EM Index	1,137.17	1.31	1.31	5.10	5.10	2.02			
China (SSE Composite)	3,359.75	0.04	2.68	4.40	4.40	10.15			
India (Sensex)	40,625.51	0.08	0.29	6.72	6.72	-1.52			

### What Move the GCC markets ,

#### Oil Prices

Oil prices were steady on Tuesday, sitting on losses of nearly 3% from the previous session as supplies began to resume in Norway, the U.S. Gulf of Mexico and Libya, while the IEA forecast a 5% fall in global energy demand in 2020. Brent crude futures also rose 4 cents to \$41.76 a barrel.

#### Kuwait Market

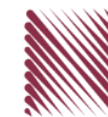
The market are closed today down by -0.29%,and positive WTD by +0.65% re-opening the local economy , more liquidity expected in MSCI , also still with fear of the second wave Covid19 with fatalities and infections surging in several countries.

#### Saudi Market

The Market closed today up by +0.66% and turn positive YTD performance leading all GCC markets , linked to the slow economic recovery over the globe and re-opening the global economy and oil prices over \$41 a barrel.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



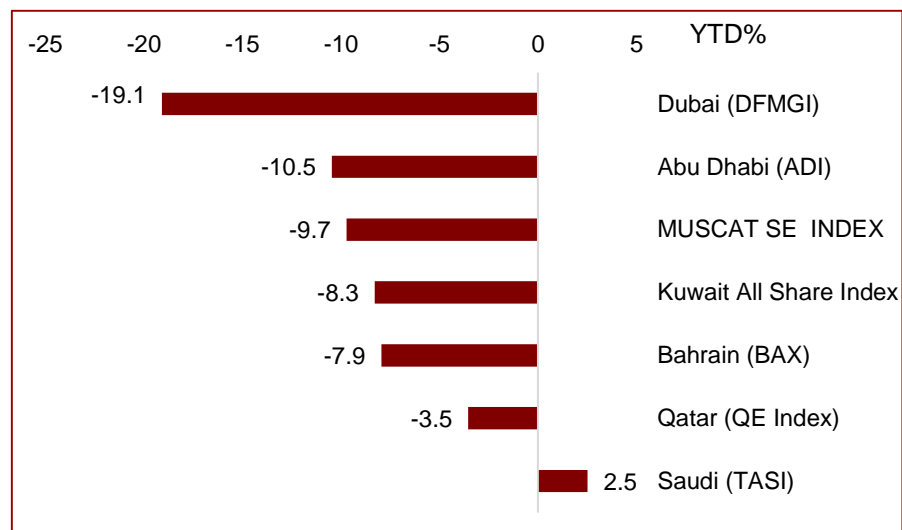
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	0.902	-1.20	1.00	4.94	4.94	-10.41	6.25 KWD	1.76	21.92
KFH	0.710	-0.28	0.85	7.72	7.72	-3.43	5.46 KWD	2.90	27.32
Zain	0.617	-1.12	1.63	8.71	8.71	4.00	2.70 KWD	2.20	13.28
BOUBYAN BANK	0.634	0.96	1.45	5.55	5.55	2.87	1.90 KWD	3.33	37.83
Agility	0.697	-1.27	0.14	7.46	7.46	-0.75	1.43 KWD	1.22	21.21
<b>Saudi Arabia</b>									
ARAMCO	35.90	-0.14	-0.28	0.00	0.00	1.84	7,190.58 SAR	7.01	29.63
SABIC	98.10	-0.41	6.75	10.97	10.97	4.47	295.52 SAR	1.81	0.00
STC	106.40	0.00	2.31	5.98	5.98	4.52	212.82 SAR	3.38	19.69
AL-RAJHI BANK	68.00	0.44	2.41	3.50	3.50	3.98	169.26 SAR	3.26	17.12
NCB	41.95	6.88	8.96	12.92	12.92	-14.82	117.76 SAR	1.61	10.79
<b>United Arab Emirates</b>									
ETISALAT.AD	16.88	0.12	-0.12	1.32	1.32	3.18	146.63 AED	3.23	16.63
FAB.AD	11.22	0.00	0.36	-0.36	-0.36	-26.12	122.52 AED	1.25	11.70
EMIRATES NBD	10.45	0.00	-0.48	-1.88	-1.88	-19.62	66.01 AED	0.81	5.81
DB ISLAMIC BK	4.21	-0.24	-0.47	-2.55	-2.55	-23.59	30.56 AED	0.84	7.39
EMAAR PROPERT	2.68	-0.37	1.13	-3.94	-3.94	-33.33	19.26 AED	0.35	3.78
<b>Qatar</b>									
QNB	18.10	0.00	-0.39	-0.55	-0.55	-12.09	167.13 QAR	1.80	14.07
INDUSTRIES QAT	9.91	-0.60	-0.09	0.82	0.82	-3.39	60.30 QAR	1.87	38.35
QA ISLAMIC BK	16.60	-0.12	-0.54	0.36	0.36	8.02	39.26 QAR	1.89	13.74
MASRAF AL RAYA	4.20	-0.31	-0.05	0.87	0.87	5.96	31.56 QAR	2.27	14.43
MESAIEED PETRO	2.11	-0.47	-0.43	1.25	1.25	-16.14	26.56 QAR	1.73	26.44
<b>OMAN</b>									
BANK MUSCAT	0.370	0.54	1.09	3.35	3.35	-10.48	1.20 OMR	0.61	7.51
OMANTEL	0.632	0.00	0.64	0.00	0.00	2.60	0.47 OMR	0.89	6.92
BANK DHOFAR	0.103	0.00	0.00	-1.90	-1.90	-16.26	0.31 QAR	0.45	20.20
NAT BANK OF OMAN	0.169	0.00	0.00	2.42	2.42	-8.15	0.27 QAR	0.52	7.10
OMINVEST	0.332	0.00	3.11	0.61	0.61	0.61	0.27 QAR	1.07	6.31

### Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
30-Sep-20	16.84%	12.11%	0.07%	0.18%	0.31%	3.64%	3.60%	7.93%	3.65%	2.94%
7-Oct-20	16.89%	12.21%	0.06%	0.19%	0.31%	3.62%	3.64%	8.01%	3.70%	2.96%

### End of Report

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### Leading Sector Performance

The market are down today by -0.29 % The leading sector bottom performance indices today are Insurance -1.07 % Telecom -0.88 % Industrials -0.7 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 20.86 % while the bottom sector performance is Consumer services by -29.59 %.

Telecommunication sector are down today by -0.88 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 8.35 %.

### KSA

Saudi Armco are have negative performance today by -0.14 %, SABIC have negative performance today by -0.41 %.

STC are flat performance today 0 %, Al Rajhi Bank have positive performance today by + 0.44 %

### UAE

ETISALAT AD flat today, still outperform the market performance in year to date basis and act defensively with COVID19



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