



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

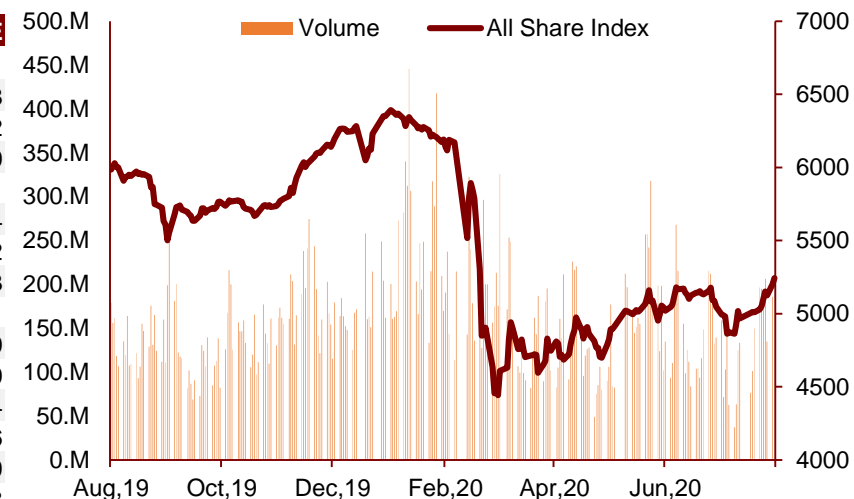
Monday, August 17, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,242.64	0.77	2.27	5.52	2.18	-16.55	30.29 KWD	1.72	18.38
Kuwait Premier Index	5,797.98	0.97	2.57	7.07	3.40	-16.89	22.30 KWD	1.86	19.02
Kuwait Main Index	4,142.91	0.18	1.45	1.39	-1.13	-15.63	8.00 KWD	1.32	16.60
Kuwait Sector									
Banking	1,210.86	1.29	2.87	7.73	4.37	-18.33	17.90 KWD	1.86	19.54
Telecom	1,068.78	0.19	2.21	5.81	3.14	-4.29	3.28 KWD	1.93	13.02
Industrials	762.76	-0.78	-0.71	-1.40	-4.21	-17.76	2.73 KWD	1.24	13.73
Financial services	849.77	0.68	3.39	1.62	-2.09	-21.42	2.16 KWD	0.89	13.31
Real estate	883.13	0.14	1.98	4.41	-1.13	-16.58	1.90 KWD	1.02	23.70
Basic materials	795.25	0.29	1.16	4.30	-2.73	-12.43	0.71 KWD	1.13	17.20
Health care	839.19	0.00	0.00	0.00	2.21	-5.13	0.42 KWD	6.14	58.54
Consumer services	729.53	-1.30	-1.27	-3.40	-6.20	-31.96	0.38 KWD	1.89	9.06
Insurance	958.27	-0.20	0.69	2.14	0.31	0.46	0.35 KWD	0.86	8.19
Consumer goods	779.18	1.77	1.62	7.70	5.82	22.29	0.24 KWD	1.61	33.28
Oil and Gas	1,096.62	0.49	1.96	0.12	0.50	-11.43	0.23 KWD	1.60	10.43
Technology	447.41	0.00	0.00	-3.91	-9.56	-13.14	0.01 KWD	0.48	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	7,757.26	-0.03	0.69	4.00	7.38	-7.53	8,511 SAR	5.60	25.69
Qatar (QE Index)	9,695.32	0.96	0.95	3.48	7.73	-7.01	513 QAR	1.68	59.08
Dubai (DFMGI)	2,205.97	1.04	2.35	7.57	6.81	-20.21	238 AED	1.01	10.14
Abu Dhabi (ADI)	4,431.33	0.41	1.02	2.94	3.40	-12.70	671 AED	4.46	14.49
Bahrain (BAX)	1,348.52	1.52	2.84	4.49	5.55	-16.25	15 BHD	1.22	15.71
MUSCAT SE INDEX	3,551.35	-0.25	-0.34	-0.42	1.05	-10.75	4 OMR	0.73	10.65
Developed Markets									
MSCI World Index	2,384.20	-0.25	0.00	3.44	8.28	1.09			
U.S. (S&P 500)	3,372.85	-0.02	0.64	3.11	8.79	4.40			
U.K. (FTSE 100)	6,128.23	0.63	0.63	3.91	-0.67	-18.75			
Japan (Topix)	1,609.82	-0.84	-0.84	7.60	3.28	-6.48			
Emerging Markets									
MSCI EM Index	1,093.16	-0.28	0.00	1.32	9.85	-1.93			
China (SSE Composite)	3,438.80	2.34	2.34	3.89	15.22	12.74			
India (Sensex)	38,050.78	0.46	0.59	1.31	9.12	-7.64			



What Move the GCC markets , Oil Prices

Oil prices steadied on Monday as news that China planned to ship large volumes of U.S. crude in August and September countered rising tensions between the two countries and a delay in the review of their trade pact over the weekend.

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 was down 13 cents, or 0.3%, to \$44.67 a barrel**

Kuwait Market

The market closed today up by +0.77%, 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 -0.03% , linked to the effect of the re-opining the local economy also the oil performance above 44\$ with the production cuts.



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.837	1.33	2.83	6.08	1.95	-17.86	5.73 KWD	1.62	19.83
KFH	0.621	0.49	1.14	7.44	1.47	-15.77	4.77 KWD	2.53	23.71
Zain	0.590	0.51	2.79	7.27	6.31	-1.67	2.55 KWD	2.08	12.49
BOUBYAN BANK	0.560	0.72	0.54	5.46	5.26	-8.27	1.70 KWD	2.97	33.49
Agility	0.627	-2.03	-2.18	-2.03	-1.76	-11.85	1.27 KWD	1.09	14.56
Saudi Arabia									
ARAMCO	33.50	0.45	0.00	1.52	3.08	-4.96	6,670.36 SAR	6.50	27.61
SABIC	88.60	-0.67	-0.23	-0.34	0.57	-5.64	267.61 SAR	1.60	0.00
STC	96.70	0.31	0.00	-0.51	-2.32	-5.01	192.81 SAR	3.06	18.07
AL-RAJHI BANK	64.10	0.47	2.07	8.83	13.25	-1.99	159.51 SAR	3.07	16.02
NCB	37.85	0.66	2.02	4.27	1.61	-23.15	112.81 SAR	1.54	10.40
United Arab Emirates									
ETISALAT.AD	16.78	0.48	0.84	0.72	1.58	2.45	145.93 AED	3.22	16.48
FAB.AD	11.20	0.00	1.44	2.93	0.00	-25.86	122.30 AED	1.25	11.68
EMIRATES NBD	10.25	2.50	7.69	18.78	18.51	-19.23	66.32 AED	0.81	5.56
DB ISLAMIC BK	3.97	0.51	2.06	5.31	3.93	-27.95	28.75 AED	0.79	6.91
EMAAR PROPERT	2.78	-0.71	0.00	8.17	1.83	-30.85	19.90 AED	0.36	3.93
Qatar									
QNB	18.50	1.54	1.76	2.78	6.38	-10.15	170.87 QAR	1.88	13.07
INDUSTRIES QAT	8.92	0.20	1.33	14.03	15.87	-13.26	53.95 QAR	1.67	33.65
QA ISLAMIC BK	16.16	0.44	0.43	0.62	2.86	5.68	38.18 QAR	1.84	13.33
MASRAF AL RAYA	4.11	2.37	2.11	4.29	7.51	3.71	30.79 QAR	2.32	13.77
MESAIEED PETRO	2.16	0.37	-0.19	2.93	6.24	-14.50	27.11 QAR	1.76	26.45
OMAN									
BANK MUSCAT	0.356	0.56	1.13	2.29	6.55	-13.39	1.16 OMR	0.60	7.27
OMANTEL	0.612	-0.65	-0.65	0.00	-5.00	-1.30	0.46 OMR	0.86	6.70
BANK DHOFAR	0.101	0.00	1.00	1.00	-3.81	-17.89	0.30 QAR	0.44	19.80
NAT BANK OF OMAN	0.166	-0.59	-0.59	-0.59	-3.45	-8.70	0.27 QAR	0.51	7.10
OMINVEST	0.338	0.00	0.00	-1.74	-0.59	2.42	0.27 QAR	0.88	8.54



Leading Sector Performance

Kuwait

The market are up today by +0.77 % The leading sector best performance indices today are Consumer goods 1.77 % Banking 1.29 % Financial services 0.68 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 22.29 % while the bottom sector performance is Consumer services by -31.96 %

Telecommunication sector are up today by +0.19 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by +12.26 %

KSA

Saudi Armco are have positive performance today by +0.45 %, SABIC have negative performance today by -0.67 %

STC are have positive performance today by +0.31 %, Al Rajhi Bank have positive performance today by +0.47 %.

UAE

ETISALAT AD are up today by 0.48% , 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
5-Aug-20	16.51%	11.46%	0.08%	0.36%	0.33%	3.57%	3.36%	7.58%	3.41%	2.92%
12-Aug-20	16.54%	11.44%	0.07%	0.35%	0.33%	3.57%	3.35%	7.52%	3.45%	2.92%

End of Report

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