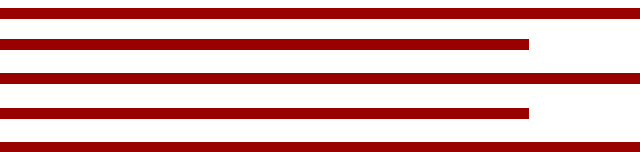
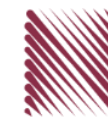


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

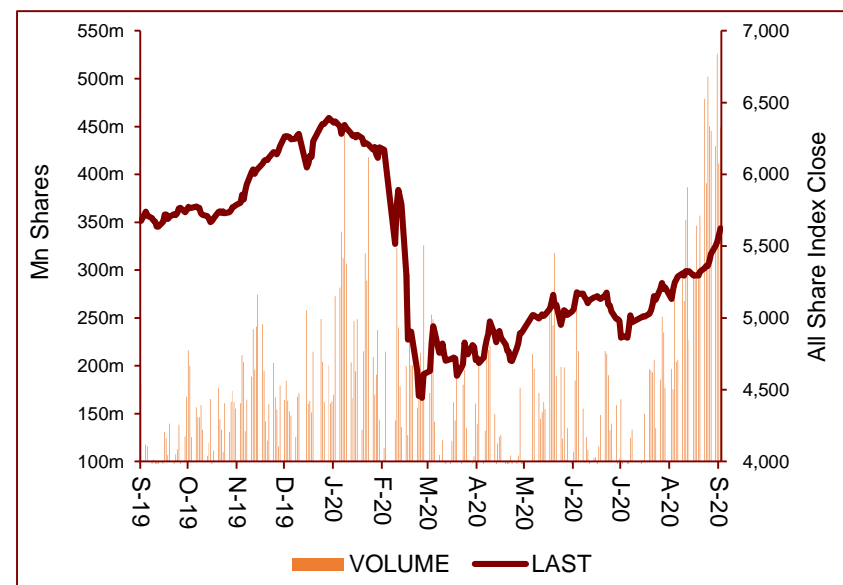
Thursday, September 24, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,608.82	-0.28	3.07	6.04	9.42	-10.64	32.65 KWD	1.90	19.03
Kuwait Premier Index	6,221.64	-0.30	3.51	6.25	10.94	-10.83	24.12 KWD	2.02	20.91
Kuwait Main Index	4,391.30	-0.20	1.36	4.93	4.80	-10.58	8.54 KWD	1.54	13.70
NIC 50	6,907.05	0.92	3.52	6.65	11.64	-7.39	27.54 KWD	1.48	14.96
Kuwait Sector									
Banking	1,315.13	-0.30	3.81	6.75	13.42	-11.25	19.57 KWD	2.13	20.45
Telecom	1,069.25	-0.46	0.90	0.02	3.35	-4.09	3.30 KWD	1.92	13.07
Industrials	824.24	-0.27	2.27	7.75	3.65	-11.02	2.96 KWD	1.34	21.62
Financial services	939.30	0.48	2.98	7.60	8.53	-12.90	2.36 KWD	0.95	7.00
Real estate	972.64	-0.18	4.36	11.37	8.91	-8.10	2.10 KWD	1.14	21.35
Basic materials	790.45	-0.89	0.50	1.65	-2.94	-12.62	0.71 KWD	1.23	19.17
Health care	820.13	-1.10	0.00	-1.09	-0.11	-7.28	0.41 KWD	6.19	52.21
Consumer services	736.01	-0.82	-0.09	2.96	-5.14	-31.20	0.38 KWD	1.86	13.34
Insurance	1,017.83	-0.69	2.84	5.07	6.48	6.64	0.38 KWD	0.90	8.16
Consumer goods	768.94	-0.88	0.72	-3.20	4.57	20.84	0.24 KWD	1.60	28.53
Oil and Gas	1,146.47	-0.01	0.39	4.59	5.09	-7.39	0.24 KWD	1.68	10.73
Technology	538.35	0.54	6.02	8.35	8.82	4.52	0.01 KWD	0.60	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	8,236.17	-0.10	-1.22	3.72	14.01	-1.82	9,265 SAR	6.17	27.45
Qatar (QE Index)	9,788.29	0.01	-1.42	-0.45	8.91	-6.00	521 QAR	1.68	93.27
Dubai (DFMGI)	2,252.25	-1.45	-2.96	0.31	9.05	-18.54	246 AED	24.51	10.77
Abu Dhabi (ADI)	4,466.82	-0.52	-0.97	-1.16	4.22	-12.00	670 AED	4.54	15.35
Bahrain (BAX)	1,450.39	-0.04	1.05	5.03	13.52	-9.92	16 BHD	1.73	13.20
MUSCAT SE INDEX	3,627.00	0.15	-0.57	-3.85	3.15	-8.90	4 OMR	0.75	10.89
Developed Markets									
MSCI World Index	2,305.57	-1.61	-2.64	-6.11	4.71	-2.24			
U.S. (S&P 500)	3,236.92	-2.32	-2.49	-7.52	4.41	0.19			
U.K. (FTSE 100)	5,866.74	-0.55	-2.34	-1.62	-4.91	-22.22			
Japan (Topix)	1,626.44	-1.08	-1.21	0.51	4.34	-5.51			
Emerging Markets									
MSCI EM Index	1,077.70	-0.48	-2.78	-2.16	8.30	-3.32			
China (SSE Composite)	3,223.18	-1.72	-3.44	-5.08	7.99	5.67			
India (Sensex)	36,553.60	-2.96	-5.75	-5.22	4.86	-11.25			



What Move the GCC markets ,

Oil Prices

Oil prices were flat on Thursday, despite a fall in U.S. inventories last week, amid a stronger dollar and a renewed wave of COVID-19 cases in Europe that led to renewed travel restrictions in several countries.

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 futures were up just 4 cents, or 0.1%, at \$41.81 a barrel

Kuwait Market

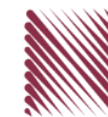
The market are closed today down by -0.28%, with fear of the second wave Covid19 , oil performance , today value traded are over 67.4 million KD.

Saudi Market

The Market closed today down by -0.10% , 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



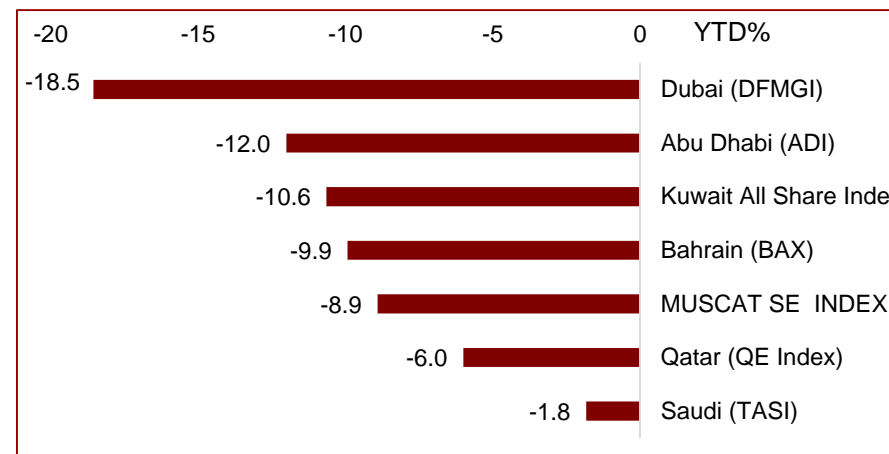
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	0.894	-0.56	2.64	3.95	8.89	-12.27	6.16 KWD	1.74	21.58
KFH	0.693	-0.14	8.10	10.86	13.40	-5.87	5.33 KWD	2.83	26.63
Zain	0.585	-0.17	0.69	-0.85	5.41	-2.50	2.54 KWD	2.07	12.47
BOUBYAN BANK	0.604	0.00	1.17	4.33	13.35	-1.22	1.83 KWD	3.20	36.38
Agility	0.678	0.00	3.52	8.33	5.91	-4.96	1.38 KWD	1.17	20.37
Saudi Arabia									
ARAMCO	36.70	0.14	0.14	3.23	12.92	4.11	7,330.00 SAR	7.14	30.45
SABIC	88.80	-0.89	-1.22	0.91	0.79	-5.43	268.80 SAR	1.64	0.00
STC	100.00	-0.60	-1.96	4.17	1.01	-1.77	201.20 SAR	3.20	18.80
AL-RAJHI BANK	66.80	0.30	-1.47	2.93	18.02	2.14	166.50 SAR	3.21	17.17
NCB	37.30	-0.53	-1.32	0.27	0.13	-24.26	112.50 SAR	1.53	10.51
United Arab Emirates									
ETISALAT.AD	16.60	0.36	-1.19	0.24	0.61	1.47	143.84 AED	3.17	16.32
FAB.AD	11.10	-0.89	0.00	-2.62	-0.71	-26.39	122.30 AED	1.25	11.68
EMIRATES NBD	10.45	-1.42	-5.00	-3.24	17.95	-19.62	66.96 AED	0.82	5.89
DB ISLAMIC BK	4.27	-0.70	-1.84	4.15	11.78	-22.50	31.14 AED	0.85	7.53
EMAAR PROPERT	2.85	-2.40	-4.68	-1.04	4.40	-29.10	20.91 AED	0.37	4.10
Qatar									
QNB	17.35	-0.91	-3.07	-3.61	-0.23	-15.74	161.73 QAR	1.78	12.56
INDUSTRIES QAT	9.96	0.40	-3.76	1.02	29.43	-3.10	60.02 QAR	1.86	37.50
QA ISLAMIC BK	15.95	-0.31	-1.05	-0.06	1.52	4.31	37.81 QAR	1.82	13.26
MASRAF AL RAYA	4.09	-1.21	-2.45	-1.77	7.23	3.43	31.05 QAR	2.34	14.22
MESAIEED PETRO	2.07	-1.38	-5.00	-1.42	3.47	-16.73	26.34 QAR	1.71	25.79
OMAN									
BANK MUSCAT	0.366	0.55	-1.08	-7.54	9.52	-10.97	1.19 OMR	0.61	7.47
OMANTEL	0.628	0.00	1.28	0.64	-1.25	2.60	0.47 OMR	0.89	6.92
BANK DHOFAR	0.105	0.00	-6.25	-5.41	0.00	-14.63	0.31 QAR	0.46	20.59
NAT BANK OF OMAN	0.170	1.82	1.82	-5.62	-3.45	-8.70	0.27 QAR	0.51	6.93
OMINVEST	0.332	0.00	0.00	-0.60	-2.35	0.61	0.27 QAR	1.07	6.31

Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
9-Sep-20	16.68%	11.69%	0.07%	0.32%	0.31%	3.65%	3.54%	7.72%	3.46%	2.94%
16-Sep-20	16.75%	11.76%	0.07%	0.31%	0.30%	3.66%	3.54%	7.76%	3.50%	2.94%

End of Report

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Leading Sector Performance

Kuwait

The market are down today by -0.28 % The leading sector bottom performance indices today are Health care -1.1 % Basic materials -0.89 % Consumer goods -0.88 % respectively

from YTD performance perspective the best sector performance are Consumer goods by 20.84 % while the bottom sector performance is Consumer services by -31.2 %

Telecommunication sector are down today by -0.46 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 6.55 %

KSA

Saudi Armco are have positive performance today by + 0.14 %, SABIC have negative performance today by -0.89 %

STC are have negative performance today by -0.6 %, Al Rajhi Bank have positive performance today by + 0.3 %.

UAE

ETISALAT AD are up today by -0.36% 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