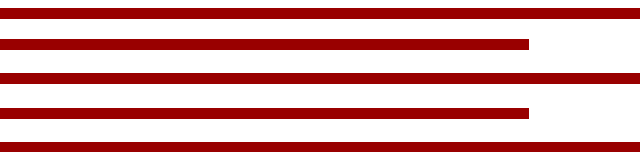


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

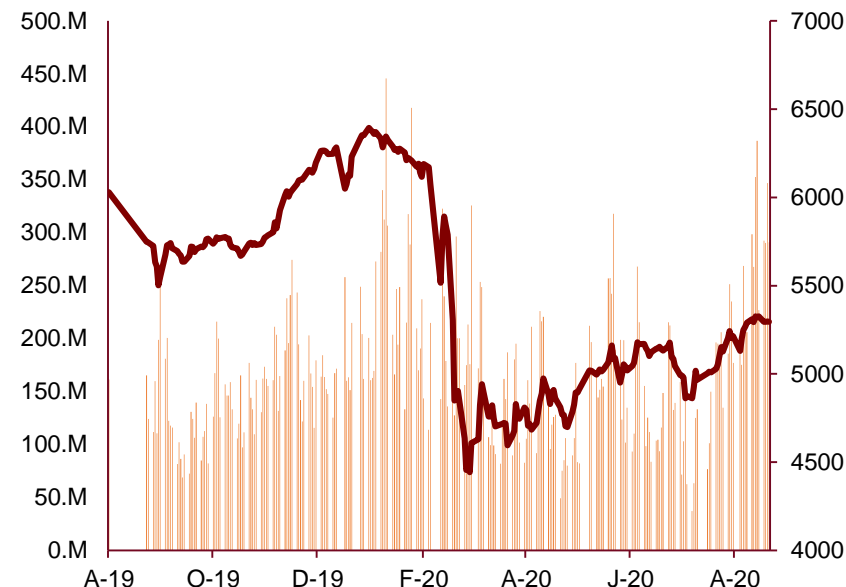
Sunday, September 13, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,345.12	0.39	0.36	0.96	4.18	-14.92	31.01 KWD	1.77	18.10
Kuwait Permier Index	5,854.57	0.32	-0.18	0.00	4.41	-16.08	22.63 KWD	1.90	19.53
Kuwait Main Index	4,340.50	0.57	0.00	0.00	0.00	0.00	8.38 KWD	1.43	14.24
Kuwait Sector									
Banking	1,237.01	0.36	-0.35	-0.01	6.24	-16.87	18.36 KWD	1.95	19.14
Telecom	1,060.43	0.67	-0.05	-1.62	1.65	-5.67	3.25 KWD	1.89	12.76
Industrials	787.94	-0.13	1.35	3.01	-0.91	-14.93	2.82 KWD	1.32	20.98
Financial services	928.77	1.57	0.21	4.46	5.36	-15.44	2.34 KWD	0.93	6.87
Real estate	894.40	-0.05	1.11	2.44	0.18	-15.47	1.92 KWD	0.99	22.05
Basic materials	762.90	-0.32	-1.52	-1.95	-6.38	-15.72	0.68 KWD	1.14	18.66
Health care	829.21	0.00	0.00	0.00	1.00	-6.26	0.41 KWD	6.19	52.21
Consumer services	726.66	-0.28	1.61	1.70	-6.31	-32.04	0.38 KWD	1.88	12.65
Insurance	998.77	1.10	0.15	2.04	3.41	3.57	0.37 KWD	0.87	7.87
Consumer goods	765.19	-0.40	-4.35	-3.42	4.33	20.57	0.23 KWD	1.57	28.24
Oil and Gas	1,137.25	0.10	5.13	3.63	4.12	-8.24	0.24 KWD	1.60	10.46
Technology	541.99	6.43	2.49	2.49	2.94	-1.13	0.01 KWD	0.61	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	8,203.57	0.84	0.84	3.31	13.56	-2.21	9,055 SAR	6.01	26.58
Qatar (QE Index)	9,878.13	1.17	0.50	0.41	9.86	-5.18	528 QAR	1.71	82.16
Dubai (DFMGI)	2,274.38	0.17	-0.36	1.30	10.12	-17.74	244 AED	25.57	10.65
Abu Dhabi (ADI)	4,510.07	-0.20	-0.93	-0.20	5.23	-11.15	668 AED	4.39	15.02
Bahrain (BAX)	1,398.41	0.63	-0.84	1.27	9.45	-13.15	15 BHD	1.46	12.70
MUSCAT SE INDEX	3,691.91	0.15	-1.42	-2.09	5.03	-7.24	4 OMR	0.76	11.16
Developed Markets									
MSCI World Index	2,368.14	0.01	-1.31	-3.56	7.56	0.41			
U.S. (S&P 500)	3,340.97	0.05	-2.51	-4.55	7.76	3.41			
U.K. (FTSE 100)	6,032.09	0.48	4.02	1.15	-2.23	-20.02			
Japan (Topix)	1,636.64	0.72	1.24	1.14	5.00	-4.92			
Emerging Markets									
MSCI EM Index	1,091.79	0.60	-0.70	-0.88	9.72	-2.05			
China (SSE Composite)	3,260.35	0.79	-2.83	-3.99	9.24	6.89			
India (Sensex)	38,854.55	0.04	1.30	0.59	11.28	-5.82			



What Move the GCC markets ,

Oil Prices

Oil prices edged higher on Sunday as equities markets firmed, but crude remained on track for a second weekly drop as investors expected a global glut to persist if demand weakens further with rising COVID-19 cases in some countries.

Infections are growing faster in India than anywhere else, and the health ministry reported another record daily jump of 96,551 new cases on Friday, taking the official total to 4.5 million. Brent crude rose 16 cents, or 0.4%, to \$40.22 a barrel

Kuwait Market

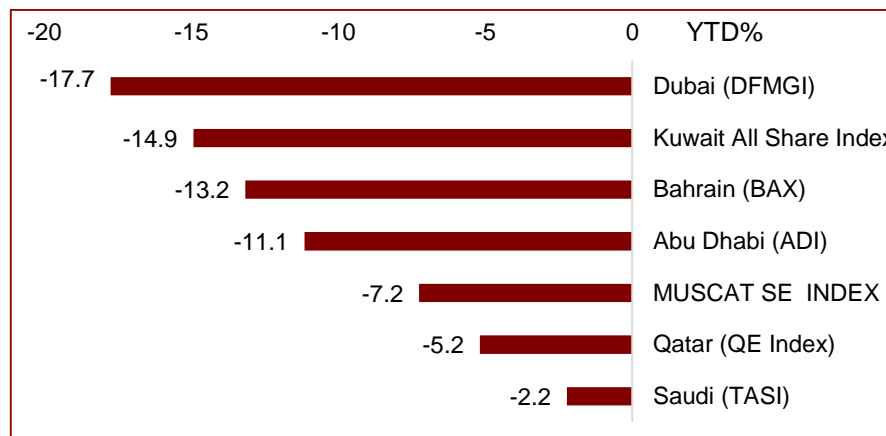
The market are closed today up by +0.39% , after re-opening the local economy , oil performance , MSCI positive liquidity expectation , New IPO's

Saudi Market

The Market closed today up by +0.84% , linked to the slow economic recovery over the globe and re-opening the global economy and oil prices over \$40 a barrel



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.866	0.81	0.23	0.70	5.48	-15.02	5.93 KWD	1.67	20.62
KFH	0.626	0.16	-0.32	0.00	2.29	-15.09	4.80 KWD	2.55	23.98
Zain	0.578	0.70	0.00	-2.03	4.14	-3.67	2.50 KWD	2.04	12.21
BOUBYAN BANK	0.589	-0.84	0.86	1.90	10.71	-3.52	1.78 KWD	3.12	35.78
Agility	0.625	-0.32	-0.16	0.16	-2.08	-12.13	1.27 KWD	1.08	18.83
Saudi Arabia									
ARAMCO	35.95	0.70	-0.14	1.13	10.62	1.99	7,140.19 SAR	6.96	29.50
SABIC	87.90	-0.23	-2.12	-0.11	-0.23	-6.39	264.31 SAR	1.62	0.00
STC	99.10	-0.10	1.43	3.23	0.10	-2.65	198.41 SAR	3.15	18.35
AL-RAJHI BANK	67.10	0.90	1.67	3.39	18.55	2.60	166.25 SAR	3.20	16.89
NCB	37.00	0.00	-0.27	-0.54	-0.67	-24.87	111.00 SAR	1.51	10.37
United Arab Emirates									
ETISALAT.AD	16.54	-0.24	-1.08	-0.12	0.24	1.10	143.84 AED	3.17	16.36
FAB.AD	11.38	-0.35	-1.56	-0.70	1.25	-24.93	124.27 AED	1.27	11.91
EMIRATES NBD	10.85	1.40	0.46	0.46	22.46	-16.54	68.54 AED	0.84	5.95
DB ISLAMIC BK	4.33	-0.23	1.17	5.61	13.35	-21.42	31.35 AED	0.86	7.60
EMAAR PROPERT	2.89	-0.69	-3.34	0.35	5.86	-28.11	20.69 AED	0.37	4.09
Qatar									
QNB	18.09	2.09	0.56	0.56	4.08	-12.09	167.09 QAR	1.84	12.71
INDUSTRIES QAT	10.10	1.10	0.50	2.94	31.89	-1.26	61.11 QAR	1.89	37.77
QA ISLAMIC BK	15.95	-0.31	-0.31	-0.31	1.27	4.04	37.69 QAR	1.81	13.26
MASRAF AL RAYA	4.18	0.72	-0.26	-0.10	9.06	5.20	31.35 QAR	2.36	14.25
MESAIEED PETRO	2.10	0.48	-1.78	-0.85	4.06	-16.25	26.41 QAR	1.72	25.73
OMAN									
BANK MUSCAT	0.384	-1.03	-1.54	-3.52	14.29	-7.10	1.25 OMR	0.64	7.92
OMANTEL	0.624	0.00	0.00	-0.64	-2.50	1.30	0.47 OMR	0.88	6.83
BANK DHOFAR	0.111	0.00	0.00	0.00	5.71	-9.76	0.33 QAR	0.49	21.76
NAT BANK OF OMAN	0.171	0.00	0.59	-3.93	-1.72	-7.07	0.28 QAR	0.52	7.18
OMINVEST	0.332	1.22	3.11	-0.60	-2.35	0.61	0.27 QAR	1.07	6.24



Leading Sector Performance

Kuwait

The market are up today by + 0.39 % The leading sector best performance indices today are Technology 6.43 % Financial services 1.57 % Insurance 1.1 % respectively.

from sectoral analysis performance perspective the Banking sector performance year to date are -16.3 %

Telecommunication sector are up today by + 0.67 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 14.92 %

KSA

Saudi Armco are have positive performance today by + 0.7 %, SABIC have negative performance today by -0.23 %.

STC are have negative performance today by -0.1 %, Al Rajhi Bank have positive performance today by + 0.9 %

UAE

ETISALAT AD are down today by -1.08%, 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
2-Sep-20	16.63%	11.63%	0.07%	0.33%	0.32%	3.62%	3.45%	7.66%	3.40%	2.93%
9-Sep-20	16.68%	11.69%	0.07%	0.32%	0.31%	3.65%	3.54%	7.72%	3.46%	2.94%

End of Report

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