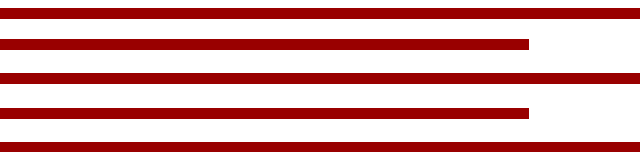


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

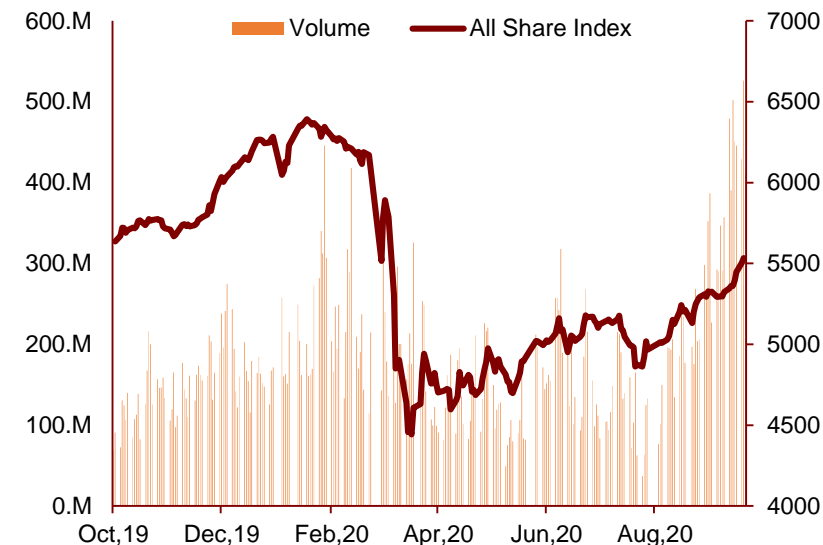
Tuesday, September 22, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,577.77	0.80	2.40	5.35	8.71	-11.22	32.03 KWD	1.87	18.65
Kuwait Premier Index	6,178.64	1.02	2.81	5.54	10.19	-11.43	23.57 KWD	1.98	20.43
Kuwait Main Index	4,384.87	0.14	1.21	4.78	4.65	-10.71	8.46 KWD	1.55	13.70
NIC 50	6,844.20	0.88	2.57	5.68	10.62	-8.23	27.05 KWD	1.46	14.70
Kuwait Sector									
Banking	1,304.90	1.21	2.95	5.86	12.48	-11.99	19.09 KWD	2.09	19.87
Telecom	1,069.69	0.34	0.78	-0.10	3.23	-4.21	3.26 KWD	1.90	12.97
Industrials	821.81	0.04	1.84	7.29	3.21	-11.40	2.93 KWD	1.36	21.32
Financial services	929.64	0.34	1.64	6.20	7.11	-14.04	2.33 KWD	0.93	6.97
Real estate	968.79	-0.06	3.92	10.90	8.46	-8.49	2.08 KWD	1.14	21.74
Basic materials	797.34	-0.15	0.99	2.14	-2.47	-12.20	0.71 KWD	1.24	19.22
Health care	829.21	0.00	0.00	0.00	1.00	-6.26	0.41 KWD	6.19	52.21
Consumer services	746.46	1.33	1.09	4.18	-4.02	-30.38	0.38 KWD	1.85	12.90
Insurance	1,010.55	1.17	2.16	4.38	5.78	5.94	0.37 KWD	0.87	7.97
Consumer goods	766.20	0.35	0.22	-3.67	4.06	20.25	0.23 KWD	1.57	28.04
Oil and Gas	1,145.94	0.41	0.32	4.52	5.02	-7.45	0.24 KWD	1.68	10.63
Technology	523.80	0.00	3.15	5.42	5.88	1.69	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)	8,244.82	-0.56	-1.12	3.83	14.13	-1.72	9,334 SAR	6.22	27.50
Qatar (QE Index)	9,841.32	0.79	-0.88	0.10	9.51	-5.48	525 QAR	1.68	91.25
Dubai (DFMGI)	2,264.22	-0.26	-2.44	0.84	9.63	-18.11	244 AED	20.78	10.73
Abu Dhabi (ADI)	4,498.23	0.13	-0.27	-0.47	4.96	-11.38	667 AED	4.48	15.33
Bahrain (BAX)	1,442.81	0.17	0.53	4.48	12.93	-10.39	16 BHD	1.74	13.12
MUSCAT SE INDEX	3,626.77	0.01	-0.57	-3.85	3.15	-8.90	4 OMR	0.75	10.92
Developed Markets									
MSCI World Index	2,329.49	-1.63	-1.63	-5.13	5.80	-1.23			
U.S. (S&P 500)	3,281.06	-1.16	-1.16	-6.26	5.83	1.56			
U.K. (FTSE 100)	5,824.45	0.35	-3.04	-2.33	-5.60	-22.78			
Japan (Topix)	1,646.42	0.49	0.60	1.75	5.62	-4.35			
Emerging Markets									
MSCI EM Index	1,090.35	-1.64	-1.64	-1.01	9.57	-2.18			
China (SSE Composite)	3,274.30	-1.29	-1.91	-3.57	9.70	7.35			
India (Sensex)	37,734.08	-0.79	-2.66	-2.12	8.29	-8.35			



What Move the GCC markets ,

Oil Prices

Oil rose in early trade on Tuesday, paring sharp overnight losses, as the latest tropical storm in the Gulf of Mexico lost strength, but worries about fuel demand persisted with flare-ups around the globe in coronavirus cases.

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 rose 40 cents, or 0.97%, to \$41.84 a barrel.**

Kuwait Market

The market are closed today up by +0.80% , after re-opening the local economy , oil performance , MSCI positive liquidity expectation , New IPO's Boursa Kuwait Co , today value traded are over 68.9 million KD.

Saudi Market

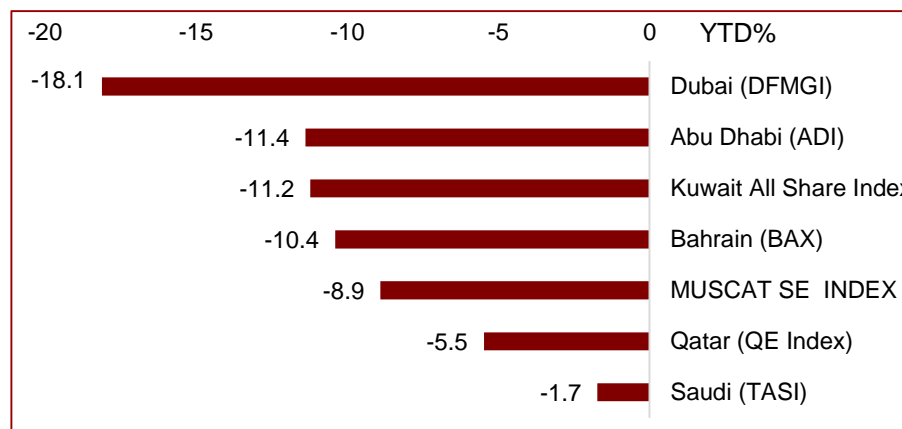
The Market closed today down by -0.56% , linked to the slow economic recovery over the globe and re-opening the global economy and oil prices over \$40 a barrel

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	0.890	1.14	2.18	3.49	8.40	-12.66	6.02 KWD	1.70	21.13	
KFH	0.682	2.40	6.23	8.95	11.44	-7.50	5.10 KWD	2.71	25.56	
Zain	0.585	0.34	0.69	-0.85	5.41	-2.50	2.52 KWD	2.06	12.40	
BOUBYAN BANK	0.601	0.17	0.84	3.98	12.97	-1.55	1.81 KWD	3.18	36.14	
Agility	0.671	0.60	2.76	7.53	5.13	-5.67	1.35 KWD	1.15	20.04	
Saudi Arabia										
ARAMCO	36.65	-0.81	0.00	3.09	12.77	3.97	7,389.41 SAR	7.20	30.45	
SABIC	89.60	-0.44	-0.33	1.82	1.70	-4.58	269.98 SAR	1.65	0.00	
STC	100.60	0.00	-1.37	4.79	1.62	-1.18	201.18 SAR	3.20	19.06	
AL-RAJHI BANK	66.60	-1.04	-1.77	2.62	17.67	1.83	168.24 SAR	3.24	17.27	
NCB	37.50	0.00	-0.79	0.81	0.67	-23.86	112.49 SAR	1.53	10.60	
United Arab Emirates										
ETISALAT.AD	16.56	0.12	-1.43	0.00	0.36	1.22	143.84 AED	3.17	16.32	
FAB.AD	11.24	0.18	0.72	-1.92	0.00	-25.86	122.52 AED	1.25	11.70	
EMIRATES NBD	10.50	-2.33	-4.55	-2.78	18.51	-19.23	67.90 AED	0.83	5.97	
DB ISLAMIC BK	4.20	0.00	-3.45	2.44	9.95	-23.77	30.41 AED	0.83	7.35	
EMAAR PROPERT	2.90	0.00	-3.01	0.69	6.23	-27.86	20.76 AED	0.37	4.07	
Qatar										
QNB	17.67	-0.17	-1.40	-1.94	1.50	-14.28	164.60 QAR	1.80	12.70	
INDUSTRIES QAT	10.00	0.46	-2.13	2.74	31.63	-1.46	60.61 QAR	1.86	37.62	
QA ISLAMIC BK	16.05	-0.31	-0.49	0.50	2.10	4.89	38.30 QAR	1.83	13.34	
MASRAF AL RAYA	4.14	-0.17	-1.41	-0.72	8.38	4.55	31.31 QAR	2.34	14.24	
MESAIEED PETRO	2.11	0.52	-4.09	-0.47	4.46	-15.94	26.58 QAR	1.71	25.84	
OMAN										
BANK MUSCAT	0.368	-0.54	-1.08	-7.54	9.52	-10.97	1.21 OMR	0.62	7.55	
OMANTEL	0.628	0.00	0.64	0.00	-1.87	1.95	0.47 OMR	0.89	6.88	
BANK DHOFAR	0.105	0.00	-6.25	-5.41	0.00	-14.63	0.32 QAR	0.46	20.59	
NAT BANK OF OMAN	0.168	1.20	1.82	-5.62	-3.45	-8.70	0.27 QAR	0.51	6.97	
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%



Leading Sector Performance

Kuwait

The market are up today by + 0.8 %The leading sector best performance indices today are Consumer services 1.33 % Banking 1.21 % Insurance 1.17 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 20.25 % while the bottom sector performance is Consumer services by -30.38 %

Telecommunication sector are up today by + 0.34 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 7.01 %

KSA

Saudi Armco are have negative performance today by -0.81 %, SABIC have negative performance today by -0.44 %.

STC are flat performance today 0 %, Al Rajhi Bank have negative performance today by -1.04 %

UAE

ETISALAT AD are down today by +0.12%, still outperform the market performance and act defensively with COVID19

End of Report

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