



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



## GCC DAILY MARKET WRAP

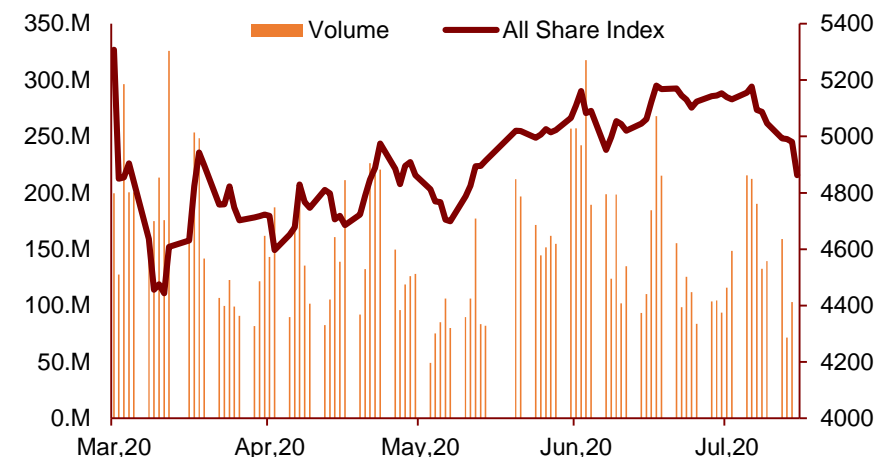
Sunday, July 26, 2020



### Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>									
		%	%	%	%	%			
Kuwait All Share Index	4,862.09	-0.26	-3.65	-5.24	-5.24	-22.61	28.12 KWD	1.45	14.70
Kuwait Permier Index	5,263.17	-0.31	-4.33	-6.13	-6.13	-24.55	20.27 KWD	1.53	14.50
Kuwait Main Index	4,071.98	-0.12	-0.12	-2.82	-2.82	-17.08	7.85 KWD	1.24	15.22
<b>Kuwait Sector</b>									
Banking	1,094.47	-0.37	-0.36	-5.66	-5.66	-26.18	16.22 KWD	1.47	14.83
Telecom	971.40	-0.35	-0.35	-6.26	-6.26	-13.01	2.98 KWD	1.72	11.87
Industrials	763.16	0.07	0.07	-4.16	-4.16	-17.72	2.72 KWD	1.31	16.17
Financial services	829.62	-0.18	-0.18	-4.41	-4.41	-23.29	2.10 KWD	0.78	11.72
Real estate	837.22	0.30	0.30	-6.27	-6.27	-20.92	1.80 KWD	0.87	11.85
Basic materials	794.54	-1.22	-1.22	-2.81	-2.81	-12.50	0.71 KWD	1.17	17.95
Health care	839.19	0.00	0.00	2.21	2.21	-5.13	0.42 KWD	6.29	47.76
Consumer services	737.85	0.35	0.36	-5.13	-5.13	-31.19	0.38 KWD	1.39	8.72
Insurance	938.51	0.10	0.10	-1.76	-1.76	-1.61	0.35 KWD	0.78	8.09
Consumer goods	722.05	1.14	1.14	-1.94	-1.94	13.32	0.22 KWD	1.54	31.01
Oil and Gas	1,085.12	-0.54	-0.54	-0.56	-0.56	-12.36	0.23 KWD	1.63	9.22
Technology	465.60	0.00	0.00	-5.88	-5.88	-9.60	0.01 KWD	0.50	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>									
		%	%	%	%	%			
Saudi (TASI)	7,434.05	0.10	0.10	2.91	2.91	-11.39	8,371 SAR	5.34	28.57
Qatar (QE Index)	9,375.40	0.08	0.68	4.17	4.17	-10.08	498 QAR	1.64	33.74
Dubai (DFMGI)	2,059.08	0.31	0.31	-0.30	-0.30	-25.53	223 AED	0.98	8.66
Abu Dhabi (ADI)	4,285.30	0.57	0.25	-0.01	-0.01	-15.57	618 AED	4.28	18.53
Bahrain (BAX)	1,283.60	-0.08	-1.45	0.47	0.47	-20.28	14 BHD	1.00	16.33
MUSCAT SE INDEX	3,557.99	-0.17	3.12	1.19	1.19	-10.63	4 OMR	0.73	9.59
<b>Developed Markets</b>									
MSCI World Index	2,291.58	-0.72	-0.10	4.08	4.08	-2.84			
U.S. (S&P 500)	3,215.63	-0.62	-0.28	3.72	3.72	-0.47			
U.K. (FTSE 100)	6,123.82	-1.41	-2.65	-0.74	-0.74	-18.81			
Japan (Topix)	1,572.96	-0.62	-0.06	0.91	0.91	-8.62			
<b>Emerging Markets</b>									
MSCI EM Index	1,060.47	-1.59	0.51	6.57	6.57	-4.86			
China (SSE Composite)	3,196.77	-3.86	-0.54	7.11	7.11	4.81			
India (Sensex)	38,128.90	-0.03	3.00	9.20	9.20	-7.57			



### What Move the GCC markets , Oil Prices

Oil prices moved slightly higher on Sunday supported by economic data from Europe, but gains were limited as tensions between the United States and China flared.

The renewed tensions between the world's top two oil consumers stoked worries about oil demand, which already faces headwinds including rising coronavirus cases in the United States. **Brent crude futures settled 3 cents higher at \$43.34 per barrel.**

### Kuwait Market

The market are closed today down by -0.26%, starting the week closing in negative territory linked to the downgrade of S&P to Kuwait credit rating to -AA from AA , also the uncertainty of the closer disclosures of companies semiannual financial results and fear of the second wave coronavirus effect of the global economy. **Value traded over 9.9 Million KD.**

### Saudi Market

The Market closed up today by +0.10% , linked to the effect of the re-opining the local economy also the oil performance above 44\$ with the production cuts.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



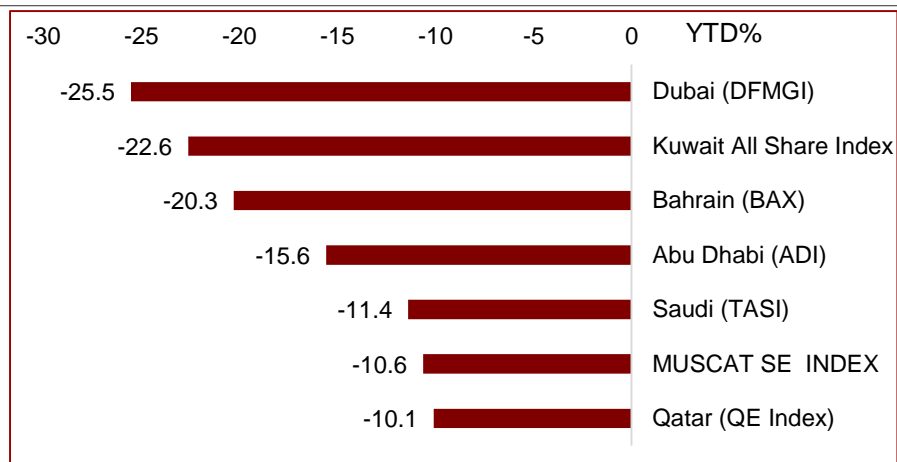
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	0.747	-1.45	-6.51	-9.01	-9.01	-26.70	5.12 KWD	1.31	13.29
KFH	0.568	0.00	-3.89	-7.19	-7.19	-22.96	4.36 KWD	1.90	17.47
Zain	0.522	-0.19	-4.92	-5.95	-5.95	-13.00	2.26 KWD	1.84	11.13
BOUBYAN BANK	0.508	0.79	-4.15	-4.51	-4.51	-16.79	1.54 KWD	2.36	25.63
Agility	0.723	0.42	-1.36	-1.50	-1.50	-11.61	1.27 KWD	1.09	14.24
<b>Saudi Arabia</b>									
ARAMCO	32.75	-0.76	-1.95	0.77	0.77	-7.09	6,600.18 SAR	6.17	21.21
SABIC	87.60	-0.45	-0.68	-0.57	-0.57	-6.71	264.01 SAR	1.58	217.86
STC	97.10	0.00	1.15	-1.92	-1.92	-4.62	194.21 SAR	3.09	18.54
AL-RAJHI BANK	58.90	1.90	2.61	4.06	4.06	-9.94	144.50 SAR	2.91	14.68
NCB	35.90	0.14	0.00	-3.62	-3.62	-27.11	107.55 SAR	1.67	9.37
<b>United Arab Emirates</b>									
ETISALAT.AD	16.90	-0.35	1.19	2.67	2.67	3.55	146.98 AED	3.24	16.73
FAB.AD	10.68	0.56	-1.65	-4.80	-4.80	-29.42	116.63 AED	1.24	10.27
EMIRATES NBD	8.93	0.45	4.44	0.79	0.79	-31.31	56.41 AED	0.69	4.94
DB ISLAMIC BK	3.78	-0.53	-1.82	-1.05	-1.05	-31.40	27.37 AED	0.75	6.65
EMAAR PROPERT	2.60	0.00	-1.52	-4.76	-4.76	-35.32	18.62 AED	0.34	3.00
<b>Qatar</b>									
QNB	18.09	0.00	-0.55	3.97	3.97	-12.19	167.09 QAR	1.84	12.98
INDUSTRIES QAT	8.08	-0.81	2.26	5.04	5.04	-21.36	48.91 QAR	1.53	23.43
QA ISLAMIC BK	16.00	0.00	2.31	1.33	1.33	4.11	37.81 QAR	1.82	13.26
MASRAF AL RAYA	3.88	-0.26	-0.05	1.57	1.57	-2.02	29.10 QAR	2.19	13.36
MESAIEED PETRO	2.09	0.43	-0.24	3.71	3.71	-16.53	26.26 QAR	1.82	27.03
<b>OMAN</b>									
BANK MUSCAT	0.346	0.00	2.37	2.98	2.98	-16.29	1.12 OMR	0.59	6.58
OMANTEL	0.608	0.00	0.00	-5.00	-5.00	-1.30	0.46 OMR	0.81	5.87
BANK DHOFAR	0.100	1.01	0.00	-4.76	-4.76	-18.70	0.30 QAR	0.44	18.68
NAT BANK OF OMAN	0.169	0.00	3.05	-2.87	-2.87	-8.15	0.27 QAR	0.52	6.60
OMINVEST	0.344	0.00	0.00	1.18	1.18	4.24	0.28 QAR	0.89	8.69

### Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
15-Jul-20	16.48%	11.83%	0.09%	0.36%	0.32%	3.53%	3.38%	7.54%	3.34%	2.90%
22-Jul-20	16.47%	11.62%	0.09%	0.38%	0.33%	3.56%	3.38%	7.60%	3.37%	2.92%

### End of Report

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### Leading Sector Performance

#### Kuwait

The market are down today by -0.26 % The leading sector bottom performance indices today are Basic materials -1.22 % Oil and Gas -0.54 % Banking -0.37 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 13.32 % while the bottom sector performance is Consumer services by -31.19 %

KFH has a positive price return performance spread over NBK in YTD perspective by +3.74%. Banking sector performance year to date are -26.18 %.

#### KSA

Saudi Armco are have negative performance today by -0.76 %, SABIC have negative performance today by -0.45 %

STC are flat performance today 0 %, Al Rajhi Bank have positive performance today by +1.9 %

#### UAE

ETISALAT.AD are down today by -0.24% also less affected by the COVID 19 Crises as telecommunication sectors are outperform and act defensively on this crises.



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