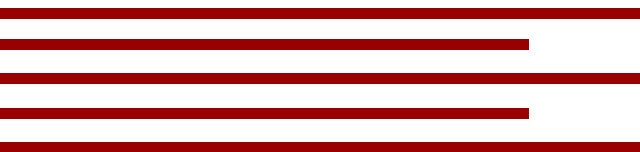


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

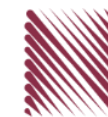


GCC DAILY MARKET WRAP

Tuesday, July 28, 2020

DAILY MARKETS WRAP,

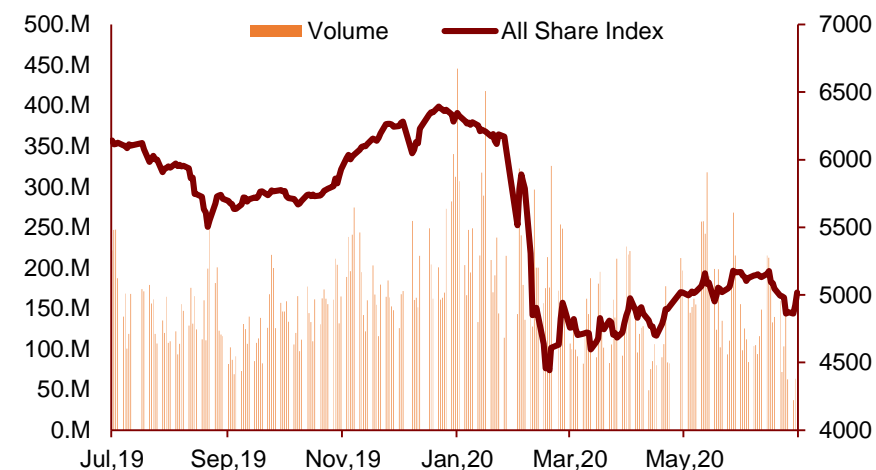
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Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,018.37	1.95	2.95	-2.19	-2.19	-20.12	28.26 KWD	1.47	14.78
Kuwait Premier Index	5,488.80	2.55	3.97	-2.11	-2.11	-21.32	20.41 KWD	1.56	14.70
Kuwait Main Index	4,089.20	0.36	0.30	-2.41	-2.41	-16.73	7.85 KWD	1.25	14.98
Kuwait Sector									
Banking	1,143.51	2.49	4.10	-1.44	-1.44	-22.87	16.49 KWD	1.51	15.02
Telecom	1,005.30	1.94	3.13	-2.99	-2.99	-9.97	3.02 KWD	1.75	11.97
Industrials	776.43	2.04	1.81	-2.49	-2.49	-16.29	2.55 KWD	1.30	16.31
Financial services	839.60	0.58	1.02	-3.26	-3.26	-22.36	2.12 KWD	0.80	11.43
Real estate	847.71	0.81	1.56	-5.10	-5.10	-19.93	1.81 KWD	0.88	12.01
Basic materials	759.42	-0.22	-5.59	-7.11	-7.11	-16.37	0.68 KWD	1.12	16.67
Health care	839.19	0.00	0.00	2.21	2.21	-5.13	0.42 KWD	6.29	47.76
Consumer services	745.84	0.33	1.44	-4.10	-4.10	-30.44	0.38 KWD	1.40	8.81
Insurance	938.24	0.09	0.07	-1.79	-1.79	-1.64	0.34 KWD	0.78	8.08
Consumer goods	723.07	0.28	1.28	-1.80	-1.80	13.48	0.22 KWD	1.54	31.32
Oil and Gas	1,092.43	0.54	0.13	0.11	0.11	-11.77	0.23 KWD	1.63	9.21
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
GCC Markets		%	%	%	%	%			
Saudi (TASI)	7,459.21	0.05	0.44	3.25	3.25	-11.09	8,367 SAR	5.33	28.46
Qatar (QE Index)	9,371.75	0.22	-0.11	3.99	3.99	-10.24	497 QAR	1.64	33.47
Dubai (DFMGI)	2,065.30	0.19	0.62	0.00	0.00	-25.30	223 AED	0.98	8.70
Abu Dhabi (ADI)	4,324.33	-0.15	1.48	0.90	0.90	-14.80	619 AED	4.28	18.90
Bahrain (BAX)	1,289.17	0.57	0.35	0.90	0.90	-19.94	14 BHD	1.01	15.93
MUSCAT SE INDEX	3,558.31	0.04	-0.16	1.20	1.20	-10.62	4 OMR	0.73	9.60
Developed Markets									
MSCI World Index	2,311.62	0.87	0.87	4.99	4.99	-1.99			
U.S. (S&P 500)	3,239.41	0.00	0.74	4.49	4.49	0.27			
U.K. (FTSE 100)	6,103.60	-0.02	-0.33	-1.07	-1.07	-19.08			
Japan (Topix)	1,569.12	-0.48	-0.24	0.66	0.66	-8.84			
Emerging Markets									
MSCI EM Index	1,073.14	1.20	1.19	7.84	7.84	-3.72			
China (SSE Composite)	3,227.96	0.71	0.98	8.15	8.15	5.83			
India (Sensex)	38,492.95	1.47	0.95	10.25	10.25	-6.69			



What Move the GCC markets , Oil Prices

Oil prices were steady on Tuesday as hopes for additional U.S. measures to stimulate the economy countered a demand outlook dampened by rising of coronavirus cases across the globe.

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 was up 13 cents, or 0.3%, at \$43.54 a barrel.**

Kuwait Market

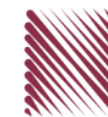
The market are closed today up by +1.95%, with the hope of the reopening of the global economy and oil price performance and aggregate demand recovery . **Value traded over 27 Million KD.**

Saudi Market

The Market closed up today by +0.05% , linked to the effect of the re-opining the local economy also the oil performance above 43\$ with the production cuts.

DAILY MARKETS WRAP,

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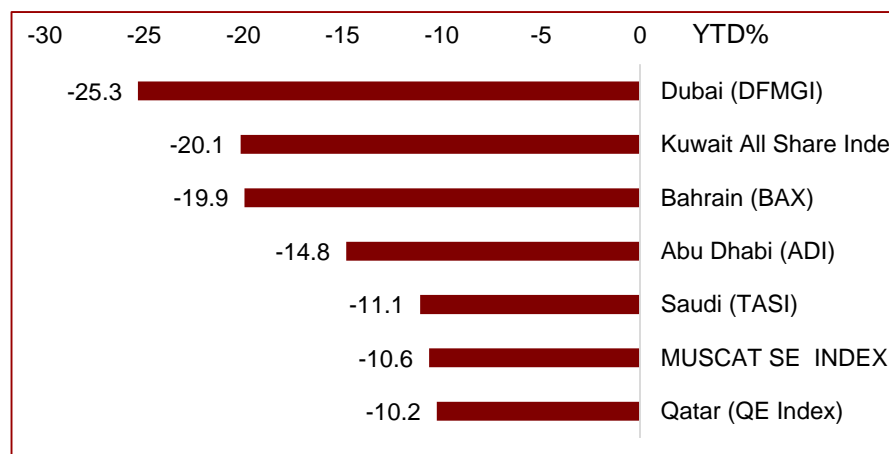
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.800	3.49	5.54	-2.56	-2.56	-21.50	5.29 KWD	1.36	13.55
KFH	0.592	2.60	4.23	-3.27	-3.27	-19.70	4.42 KWD	1.93	17.74
Zain	0.545	2.25	4.21	-1.80	-1.80	-9.17	2.30 KWD	1.88	11.34
BOUBYAN BANK	0.533	3.09	5.75	0.19	0.19	-12.69	1.56 KWD	2.41	26.29
Agility	0.645	2.87	3.02	1.06	1.06	-9.32	1.10 KWD	1.09	14.26
Saudi Arabia									
ARAMCO	33.00	0.15	0.00	1.54	1.54	-6.38	6,589.47 SAR	6.16	21.05
SABIC	88.90	0.45	1.02	0.91	0.91	-5.32	265.48 SAR	1.59	217.86
STC	97.20	0.10	0.10	-1.82	-1.82	-4.52	194.18 SAR	3.09	18.14
AL-RAJHI BANK	58.90	-0.17	1.90	4.06	4.06	-9.94	147.49 SAR	2.97	15.01
NCB	36.30	0.83	1.26	-2.55	-2.55	-26.29	107.99 SAR	1.68	9.37
United Arab Emirates									
ETISALAT.AD	16.90	-0.47	-0.59	2.18	2.18	3.06	147.67 AED	3.25	16.75
FAB.AD	10.96	0.00	3.20	-2.49	-2.49	-27.70	119.68 AED	1.28	10.60
EMIRATES NBD	8.87	-1.44	-0.22	0.11	0.11	-31.77	56.85 AED	0.70	5.00
DB ISLAMIC BK	3.80	0.80	0.00	-0.52	-0.52	-31.03	27.30 AED	0.75	6.60
EMAAR PROPERT	2.59	1.57	-0.38	-5.13	-5.13	-35.57	18.26 AED	0.34	2.94
Qatar									
QNB	18.09	0.11	-0.28	3.74	3.74	-12.38	166.92 QAR	1.84	12.97
INDUSTRIES QAT	7.83	-2.20	-2.87	2.86	2.86	-23.00	48.42 QAR	1.51	23.01
QA ISLAMIC BK	16.09	0.37	0.56	2.16	2.16	4.96	37.88 QAR	1.82	13.28
MASRAF AL RAYA	3.91	0.46	0.39	2.23	2.23	-1.39	29.17 QAR	2.19	13.36
MESAIEED PETRO	2.10	0.96	0.43	3.47	3.47	-16.73	26.13 QAR	1.81	27.01
OMAN									
BANK MUSCAT	0.346	0.58	-0.57	2.98	2.98	-16.29	1.12 OMR	0.59	6.54
OMANTEL	0.612	0.66	0.66	-4.37	-4.37	-0.65	0.46 OMR	0.81	5.87
BANK DHOFAR	0.100	0.00	0.00	-4.76	-4.76	-18.70	0.30 QAR	0.44	18.87
NAT BANK OF OMAN	0.169	0.00	0.00	-2.87	-2.87	-8.15	0.28 QAR	0.52	6.60
OMINVEST	0.344	0.00	0.58	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 up today by +1.95 % The leading sector best performance indices today are Banking 2.49 % Industrials 2.04 % Telecom 1.94 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 13.48 % while the bottom sector performance is Consumer services by -30.44 %

KFH has a positive price return performance spread over NBK in YTD perspective by +1.79%. Banking sector performance year to date are -22.8 %.

KSA

Saudi Armco are have positive performance today by +0.15 %, SABIC have positive performance today by +0.45 %

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

UAE

STC are have positive performance today by +0.1 %, Al Rajhi Bank have negative performance today by -0.17 %.



شركة الاستثمار الوطنية
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