



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

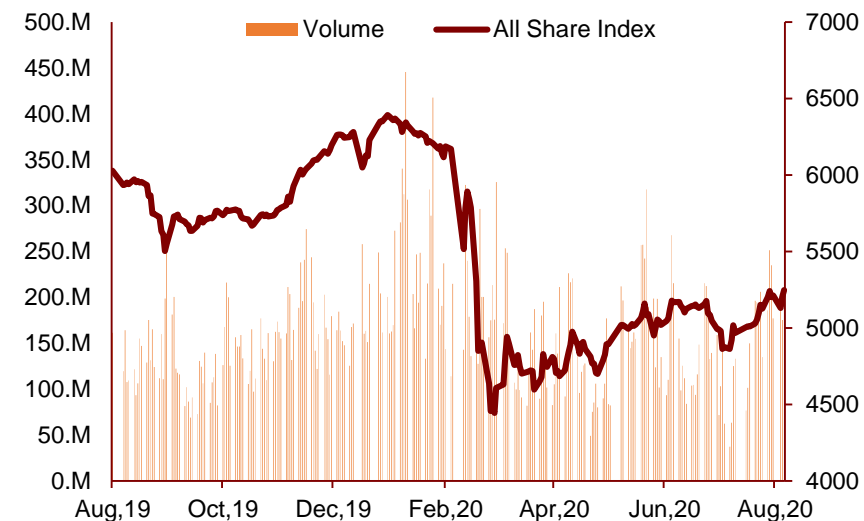
Tuesday, August 25, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	5,248.53	0.90	0.68	5.64	2.30	-16.46	30.43 KWD	1.74	18.08
Kuwait Premier Index	5,806.17	1.13	0.89	7.22	3.55	-16.77	22.42 KWD	1.87	19.11
Kuwait Main Index	4,144.11	0.25	0.09	1.42	-1.10	-15.61	8.01 KWD	1.38	15.20
Kuwait Sector									
Banking	1,217.86	1.22	0.93	8.36	4.97	-17.86	18.04 KWD	1.90	18.60
Telecom	1,069.77	0.53	0.19	5.91	3.23	-4.20	3.28 KWD	1.92	12.98
Industrials	762.73	0.67	0.52	-1.40	-4.21	-17.77	2.73 KWD	1.25	19.85
Financial services	861.72	0.68	1.25	3.04	-0.71	-20.32	2.20 KWD	0.93	11.30
Real estate	872.65	0.26	-0.55	3.17	-2.31	-17.57	1.88 KWD	1.01	22.38
Basic materials	783.90	-0.45	-0.69	2.81	-4.11	-13.68	0.70 KWD	1.15	18.80
Health care	829.21	0.00	0.00	0.00	1.00	-6.26	0.41 KWD	6.17	52.21
Consumer services	720.07	1.62	-0.58	-4.65	-7.42	-32.85	0.37 KWD	1.85	11.79
Insurance	959.38	-0.01	2.47	2.26	0.42	0.58	0.35 KWD	0.84	7.74
Consumer goods	795.41	1.65	1.12	9.95	8.02	24.83	0.24 KWD	1.65	28.84
Oil and Gas	1,069.23	-2.07	-2.51	-2.38	-2.01	-13.65	0.22 KWD	1.53	10.21
Technology	472.88	6.56	7.26	1.56	-4.41	-8.19	0.01 KWD	0.53	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	7,938.36	-0.24	1.22	6.42	9.89	-5.37	8,856 SAR	5.87	26.07
Qatar (QE Index)	9,909.12	0.19	1.29	5.60	9.94	-5.11	522 QAR	1.71	62.68
Dubai (DFMGI)	2,304.50	1.03	2.57	12.37	11.58	-16.65	248 AED	31.81	10.75
Abu Dhabi (ADI)	4,558.70	-0.25	1.29	5.90	6.37	-10.19	679 AED	4.38	14.77
Bahrain (BAX)	1,373.84	0.61	1.37	6.45	7.53	-14.68	15 BHD	1.34	13.29
MUSCAT SE INDEX	3,730.10	1.08	2.79	4.54	6.09	-6.31	4 OMR	0.77	10.99
Developed Markets									
MSCI World Index	2,417.05	1.04	1.04	4.86	9.78	2.48			
U.S. (S&P 500)	3,431.28	1.00	1.00	4.90	10.68	6.21			
U.K. (FTSE 100)	6,114.93	0.17	1.88	3.68	-0.89	-18.93			
Japan (Topix)	1,625.23	1.13	1.32	8.63	4.26	-5.58			
Emerging Markets									
MSCI EM Index	1,108.23	1.50	1.50	2.72	11.37	-0.58			
China (SSE Composite)	3,373.58	-0.36	-0.21	1.92	13.03	10.60			
India (Sensex)	38,843.88	0.12	1.09	3.31	11.27	-5.82			



What Move the GCC markets ,

Oil Prices

Crude oil prices were mixed on Tuesday as traders weighed massive production cuts in the U.S. Gulf Coast from Tropical Storms Marco and Laura against rising coronavirus cases in Asia and Europe.

OPEC said in a monthly report that world oil demand will fall by 9.06 million bpd this year, more than the 8.95 million bpd decline expected a month ago. **Brent crude oil futures added 5 cents, or 0.1%, to \$45.18 a barrel**

Kuwait Market

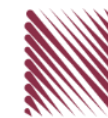
The market are closed today up by +0.9% due to re-opening the local economy and the effect of demand recovery and production cut effect on the oil prices also the positive effect on inflows from MSCI in Nov 2020 also new companies traded and the expected positive effect to the market liquidity.

Saudi Market

The Market closed down today by -0.24% , linked to the fear from second wave corona virus also 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



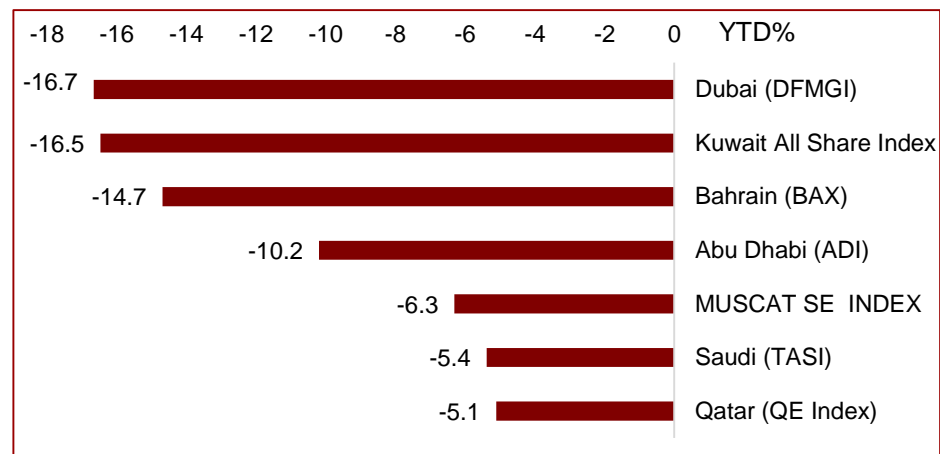
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
		%	%	%	%	%			
Kuwait									
NBK	0.851	2.16	2.28	7.86	3.65	-16.49	5.83 KWD	1.64	20.00
KFH	0.623	0.97	0.97	7.79	1.80	-15.50	4.78 KWD	2.54	23.68
Zain	0.589	0.51	-0.17	7.09	6.13	-1.83	2.55 KWD	2.08	12.47
BOUBYAN BANK	0.565	1.62	0.36	6.40	6.20	-7.45	1.71 KWD	3.00	33.49
Agility	0.625	1.13	1.30	-2.34	-2.08	-12.13	1.27 KWD	1.08	18.56
Saudi Arabia									
ARAMCO	34.95	0.14	2.34	5.91	7.54	-0.85	6,979.44 SAR	6.80	28.10
SABIC	88.40	-0.11	0.00	-0.56	0.34	-5.86	265.48 SAR	1.62	0.00
STC	96.50	-0.21	-0.10	-0.72	-2.53	-5.21	193.38 SAR	3.07	18.07
AL-RAJHI BANK	66.00	0.30	1.69	12.05	16.61	0.92	164.49 SAR	3.17	16.61
NCB	38.10	-1.68	-1.30	4.96	2.28	-22.64	116.24 SAR	1.59	10.95
United Arab Emirates									
ETISALAT.AD	16.80	-0.83	-1.06	0.72	1.58	2.45	146.11 AED	3.22	16.71
FAB.AD	11.50	0.00	0.53	4.95	1.96	-24.41	125.58 AED	1.29	11.99
EMIRATES NBD	11.20	-0.88	5.16	26.70	26.41	-13.85	70.75 AED	0.87	6.28
DB ISLAMIC BK	4.20	1.94	3.45	11.41	9.95	-23.77	30.41 AED	0.83	7.21
EMAAR PROPERT	3.03	2.36	4.12	17.90	10.99	-24.63	21.69 AED	0.39	4.16
Qatar									
QNB	18.30	0.00	-1.08	1.67	5.23	-11.12	169.03 QAR	1.86	13.13
INDUSTRIES QAT	10.09	-0.10	11.32	28.13	30.20	-2.53	61.04 QAR	1.89	38.19
QA ISLAMIC BK	16.19	0.56	0.19	0.50	2.73	5.54	38.26 QAR	1.84	13.34
MASRAF AL RAYA	4.12	-0.65	-0.67	4.67	7.91	4.09	30.91 QAR	2.32	14.24
MESAIEED PETRO	2.12	-0.65	0.19	2.06	5.35	-15.22	26.68 QAR	1.73	26.30
OMAN									
BANK MUSCAT	0.400	2.04	3.63	14.29	19.05	-3.23	1.30 OMR	0.67	8.00
OMANTEL	0.612	0.00	0.00	0.66	-4.37	-0.65	0.46 OMR	0.87	6.70
BANK DHOFAR	0.110	4.76	-1.79	10.00	4.76	-10.57	0.33 QAR	0.48	20.59
NAT BANK OF OMAN	0.180	0.00	0.56	6.51	3.45	-2.17	0.29 QAR	0.55	7.56
OMINVEST	0.338	0.00	0.00	-1.74	-0.59	2.42	0.27 QAR	1.09	6.43

Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
12-Aug-20	16.54%	11.44%	0.07%	0.35%	0.33%	3.57%	3.35%	7.52%	3.45%	2.92%
19-Aug-20	16.56%	11.38%	0.07%	0.34%	0.33%	3.58%	3.34%	7.52%	3.43%	2.92%

End of Report

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document is confidential and may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed and others authorized to receive it.



Leading Sector Performance

Kuwait

The market are up today by +0.9 % The leading sector best performance indices today are Technology 6.56 % Consumer goods 1.65 % Consumer services 1.62 % respectively

from YTD performance perspective the best sector performance are Consumer goods by 24.83 % while the bottom sector performance is Consumer services by -32.85 %

Telecommunication sector are up today by +0.53 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by +12.26 %

KSA

Saudi Armco are have positive performance today by +0.14 %, SABIC have negative performance today by -0.11 %

STC are have negative performance today by -0.21 %, Al Rajhi Bank have positive performance today by +0.3 %

UAE

ETISALAT AD are down today by -0.83% , still outperform the market performance 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