



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



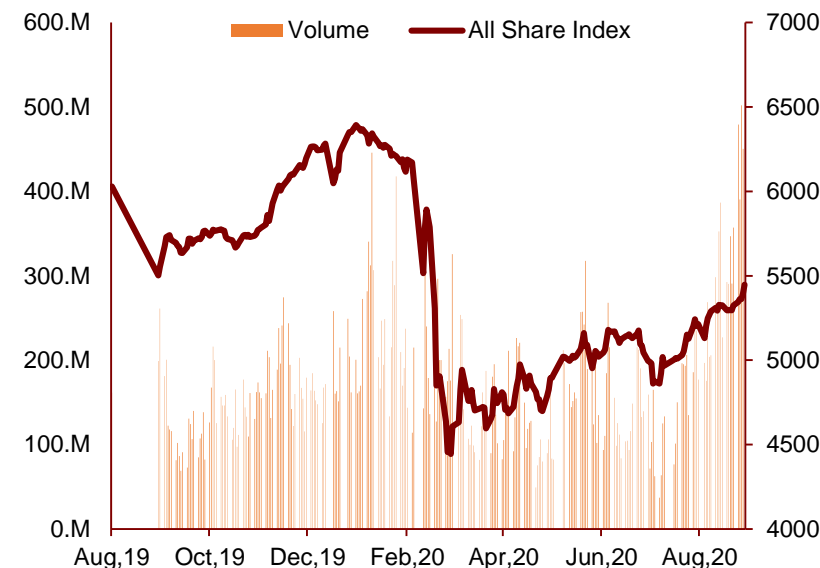
GCC DAILY MARKET WRAP

Thursday, September 17, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,447.16	0.97	2.31	2.89	6.17	-13.30	31.56 KWD	1.83	18.16
Kuwait Premier Index	6,009.90	1.28	2.98	2.65	7.18	-13.85	23.17 KWD	1.94	19.77
Kuwait Main Index	4,332.43	0.08	0.39	3.53	3.40	-11.78	8.39 KWD	1.51	13.71
Kuwait Sector									
Banking	1,267.57	1.07	2.84	2.83	9.26	-14.51	18.76 KWD	2.03	19.32
Telecom	1,061.45	0.60	0.76	-0.87	2.43	-4.95	3.25 KWD	1.90	12.83
Industrials	807.00	1.91	2.28	5.36	1.35	-12.99	2.88 KWD	1.34	20.62
Financial services	914.65	0.26	0.02	4.48	5.38	-15.43	2.32 KWD	0.93	7.02
Real estate	932.23	0.98	4.18	6.72	4.36	-11.94	2.00 KWD	1.08	20.80
Basic materials	789.50	0.80	3.16	1.14	-3.43	-13.06	0.70 KWD	1.23	18.84
Health care	829.21	0.00	0.00	0.00	1.00	-6.26	0.41 KWD	6.19	52.21
Consumer services	738.42	0.13	1.34	3.06	-5.06	-31.13	0.38 KWD	1.87	13.09
Insurance	989.18	-0.37	0.13	2.17	3.54	3.70	0.36 KWD	0.87	7.94
Consumer goods	764.49	0.49	-0.49	-3.89	3.82	19.98	0.23 KWD	1.57	27.96
Oil and Gas	1,142.24	1.87	0.54	4.18	4.68	-7.75	0.24 KWD	1.69	10.35
Technology	507.79	6.08	-0.29	2.20	2.65	-1.41	0.01 KWD	0.57	0.00



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	8,337.88	0.32	2.49	5.00	15.42	-0.61	9,206 SAR	6.10	26.91
Qatar (QE Index)	9,942.06	0.01	1.92	1.08	10.59	-4.55	533 QAR	1.72	96.06
Dubai (DFMGI)	2,320.87	0.86	2.22	3.37	12.38	-16.06	249 AED	24.72	10.83
Abu Dhabi (ADI)	4,510.60	0.12	-0.19	-0.19	5.25	-11.13	678 AED	4.58	15.16
Bahrain (BAX)	1,435.25	1.23	3.28	3.94	12.34	-10.86	16 BHD	1.66	12.89
MUSCAT SE INDEX	3,647.71	-0.40	-1.04	-3.28	3.75	-8.37	4 OMR	0.75	11.06
Developed Markets									
MSCI World Index	2,403.50	-0.19	1.49	-2.12	9.16	1.91			
U.S. (S&P 500)	3,385.49	-0.46	1.33	-3.28	9.20	4.79			
U.K. (FTSE 100)	6,056.71	-0.36	0.41	1.56	-1.83	-19.70			
Japan (Topix)	1,638.40	-0.36	0.11	1.25	5.11	-4.82			
Emerging Markets									
MSCI EM Index	1,116.99	0.39	2.31	1.41	12.25	0.21			
China (SSE Composite)	3,270.44	-0.41	0.31	-3.69	9.57	7.22			
India (Sensex)	38,979.85	-0.82	0.35	0.93	11.67	-5.49			

What Move the GCC markets ,

Oil Prices

Oil prices fell on Thursday, after rising steeply in the two previous sessions, as concerns about weak fuel demand re-emerged and producers in the Gulf of Mexico prepared to resume output following Hurricane Sally.

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 fell 67 cents, or 1.6%, to \$41.55 a barrel .**

Kuwait Market

The market are closed today up by +0.97% , after re-opening the local economy , oil performance , MSCI positive liquidity expectation , New IPO's Boursa Kuwait Co , today value traded are over 72 million KD.

Saudi Market

The Market closed today up by +0.32% , 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

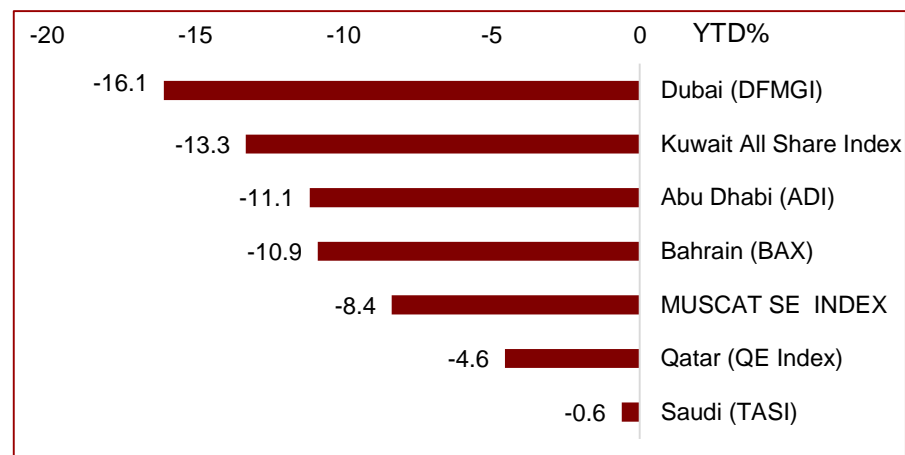


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
		%	%	%	%	%			
Kuwait									
NBK	0.871	0.58	1.40	1.28	6.09	-14.53	5.97 KWD	1.68	20.79
KFH	0.642	1.26	2.72	2.56	4.90	-12.92	4.93 KWD	2.62	24.33
Zain	0.581	0.87	1.22	-1.53	4.68	-3.17	2.51 KWD	2.05	12.26
BOUBYAN BANK	0.596	0.51	0.34	3.11	12.03	-2.37	1.80 KWD	3.16	35.72
Agility	0.653	3.82	4.15	4.65	2.31	-8.20	1.32 KWD	1.12	18.89
Saudi Arabia									
ARAMCO	36.65	1.10	2.66	3.09	12.77	3.97	7,249.23 SAR	7.07	29.79
SABIC	89.90	0.56	2.04	2.16	2.04	-4.26	268.17 SAR	1.64	0.00
STC	102.00	-0.97	2.82	6.25	3.03	0.20	205.98 SAR	3.27	19.06
AL-RAJHI BANK	67.80	-0.73	1.95	4.47	19.79	3.67	170.73 SAR	3.29	17.50
NCB	37.80	-0.66	2.16	1.61	1.48	-23.25	114.14 SAR	1.56	10.67
United Arab Emirates									
ETISALAT.AD	16.80	1.33	1.33	1.45	1.82	2.69	146.11 AED	3.22	16.36
FAB.AD	11.16	-0.89	-2.10	-2.44	-0.53	-26.25	121.87 AED	1.25	11.74
EMIRATES NBD	11.00	1.85	2.80	1.85	24.15	-15.38	69.48 AED	0.85	6.00
DB ISLAMIC BK	4.35	0.93	0.23	6.10	13.87	-21.05	31.50 AED	0.86	7.54
EMAAR PROPERT	2.99	0.00	2.75	3.82	9.52	-25.62	21.41 AED	0.38	4.20
Qatar									
QNB	17.90	-0.22	1.02	-0.56	2.93	-13.06	165.33 QAR	1.82	12.87
INDUSTRIES QAT	10.35	-0.48	4.60	5.98	35.78	1.65	62.62 QAR	1.94	39.32
QA ISLAMIC BK	16.16	0.37	0.63	0.63	2.22	5.02	38.18 QAR	1.84	13.34
MASRAF AL RAYA	4.20	0.70	0.48	0.00	9.16	5.30	31.49 QAR	2.37	14.32
MESAIEED PETRO	2.20	4.22	5.16	3.77	8.91	-12.35	27.64 QAR	1.80	25.97
OMAN									
BANK MUSCAT	0.372	1.09	-3.63	-6.53	10.71	-10.00	1.21 OMR	0.62	7.51
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	-0.89	0.00	5.71	-9.76	0.33 QAR	0.49	21.76
NAT BANK OF OMAN	0.165	-2.35	-2.35	-6.74	-4.60	-9.78	0.27 QAR	0.51	7.14
OMINVEST	0.332	0.00	3.11	-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%

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Leading Sector Performance

Kuwait

The market are up today by + 0.97 % The leading sector best performance indices today are Technology 6.08 % Industrials 1.91 % Oil and Gas 1.87 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 19.98 % while the bottom sector performance is Consumer services by -31.13 %.

Telecommunication sector are up today by + 0.6 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 8.35 %.

KSA

Saudi Armco are have positive performance today by + 1.1 %, SABIC have positive performance today by + 0.56 %.

STC are have negative performance today by -0.97 %, Al Rajhi Bank have negative performance today by -0.73 %.

UAE

ETISALAT AD are up today by +1.33%, still outperform the market performance and act defensively with COVID19



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