



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

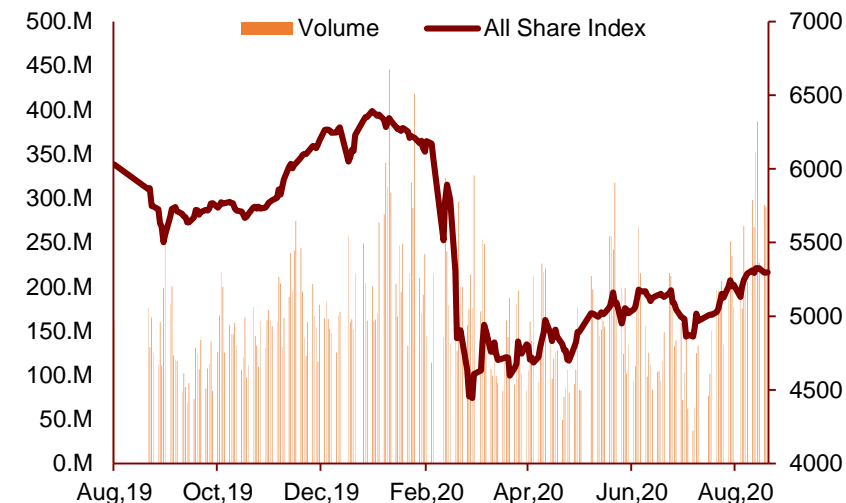
Tuesday, September 8, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,297.49	0.05	-0.53	0.06	3.25	-15.68	30.70 KWD	1.77	18.17
Kuwait Premier Index	5,815.74	0.14	-0.84	-0.66	3.72	-16.63	22.45 KWD	1.89	19.47
Kuwait Main Index	4,274.36	-0.18	0.33	2.14	2.01	-12.96	8.25 KWD	1.43	14.65
Kuwait Sector									
Banking	1,225.97	-0.05	-0.87	-0.54	5.67	-17.31	18.17 KWD	1.95	19.08
Telecom	1,050.23	0.20	-0.35	-1.92	1.35	-5.95	3.22 KWD	1.88	12.68
Industrials	780.15	0.24	0.21	1.86	-2.02	-15.89	2.78 KWD	1.28	20.99
Financial services	914.57	-0.29	0.22	4.47	5.37	-15.43	2.31 KWD	0.94	7.67
Real estate	887.45	0.44	0.26	1.59	-0.65	-16.17	1.91 KWD	0.99	22.70
Basic materials	770.50	-0.45	-0.86	-1.29	-5.75	-15.15	0.69 KWD	1.15	18.81
Health care	829.21	0.00	0.00	0.00	1.00	-6.26	0.41 KWD	6.19	52.21
Consumer services	721.58	0.81	0.63	0.71	-7.22	-32.70	0.37 KWD	1.89	12.45
Insurance	980.38	1.34	-0.62	1.26	2.62	2.78	0.36 KWD	0.86	7.71
Consumer goods	778.48	0.44	-3.07	-2.13	5.72	22.18	0.24 KWD	1.60	28.51
Oil and Gas	1,108.10	1.77	2.53	1.07	1.55	-10.51	0.23 KWD	1.50	9.93
Technology	507.79	4.96	2.20	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)	8,089.54	0.49	0.55	1.87	11.98	-3.57	9,042 SAR	6.02	26.58
Qatar (QE Index)	9,760.68	0.36	-0.77	-0.86	8.47	-6.38	516 QAR	1.68	71.51
Dubai (DFMGI)	2,287.98	0.73	0.23	1.90	10.78	-17.25	246 AED	29.39	10.64
Abu Dhabi (ADI)	4,519.56	0.26	-0.72	0.01	5.45	-10.96	672 AED	4.40	14.86
Bahrain (BAX)	1,402.25	-0.18	-0.56	1.55	9.76	-12.91	15 BHD	1.48	12.84
MUSCAT SE INDEX	3,701.19	-0.14	-1.20	-1.87	5.27	-7.03	4 OMR	0.76	11.19
Developed Markets									
MSCI World Index	2,408.05	0.35	0.35	-1.93	9.37	2.10			
U.S. (S&P 500)	3,426.96	0.00	-2.31	-2.10	10.54	6.07			
U.K. (FTSE 100)	5,901.11	-0.61	1.76	-1.05	-4.35	-21.76			
Japan (Topix)	1,620.89	0.69	0.27	0.17	3.99	-5.84			
Emerging Markets									
MSCI EM Index	1,094.56	-0.45	-0.45	-0.63	10.00	-1.80			
China (SSE Composite)	3,316.42	0.72	-1.16	-2.33	11.11	8.73			
India (Sensex)	38,365.35	-0.14	-0.18	-0.88	9.66	-7.19			



What Move the GCC markets , Oil Prices

Oil fell below \$42 a barrel on Tuesday, its 5th session of decline, pressured by concerns that a recovery in demand could weaken as coronavirus infections flare up around the world.

Prices were pressured by extended declines in the U.S. equities market and by a report showing U.S. job growth slowed further in August as financial assistance from the government ran out. Brent crude fell \$1.28, or 3.05%, to trade at \$40.73 per barrel.

Kuwait Market

The market are closed today flat, concern around a slow of local economic recovery from the COVID-19 pandemic added to worries about weak oil demand. resurgence of the number of cases and the fear from second wave ,

Saudi Market

The Market closed up today by 0.49% , linked to the 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



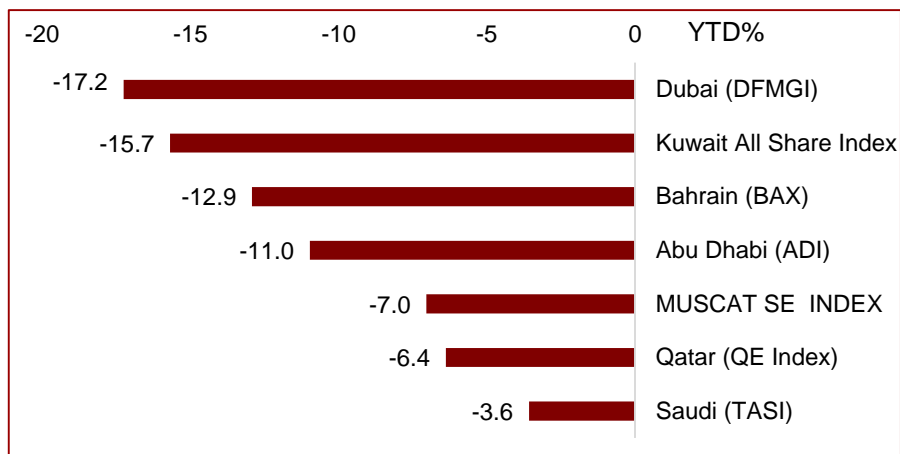
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.851	-0.23	-1.50	-1.05	3.65	-16.49	5.83 KWD	1.64	20.48
KFH	0.624	0.16	-0.64	-0.32	1.96	-15.36	4.79 KWD	2.54	23.91
Zain	0.573	0.17	-0.87	-2.88	3.24	-4.50	2.48 KWD	2.02	12.17
BOUBYAN BANK	0.594	1.89	1.71	2.77	11.65	-2.70	1.80 KWD	3.15	35.12
Agility	0.621	-0.16	-0.80	-0.48	-2.70	-12.70	1.26 KWD	1.07	18.68
Saudi Arabia									
ARAMCO	35.95	0.56	-0.14	1.13	10.62	1.99	7,149.81 SAR	6.97	29.54
SABIC	88.00	0.00	-2.00	0.00	-0.11	-6.28	263.99 SAR	1.61	0.00
STC	98.30	1.03	0.61	2.40	-0.71	-3.44	194.59 SAR	3.09	18.22
AL-RAJHI BANK	66.20	0.15	0.30	2.00	16.96	1.22	165.25 SAR	3.18	16.84
NCB	37.00	0.00	-0.27	-0.54	-0.67	-24.87	111.00 SAR	1.51	10.36
United Arab Emirates									
ETISALAT.AD	16.58	0.36	-0.84	0.12	0.48	1.34	144.19 AED	3.18	16.30
FAB.AD	11.42	0.18	-1.38	-0.52	1.42	-24.80	124.71 AED	1.28	11.88
EMIRATES NBD	11.00	1.85	1.85	1.85	24.15	-15.38	69.48 AED	0.85	6.00
DB ISLAMIC BK	4.34	1.17	1.40	5.85	13.61	-21.23	31.42 AED	0.86	7.51
EMAAR PROPERT	2.93	0.00	-2.01	1.74	7.33	-27.11	20.98 AED	0.38	4.12
Qatar									
QNB	17.76	-0.22	-1.33	-1.33	2.13	-13.74	164.04 QAR	1.81	12.77
INDUSTRIES QAT	10.00	0.00	-0.99	1.42	29.94	-2.72	60.50 QAR	1.87	37.81
QA ISLAMIC BK	15.90	-0.06	-0.62	-0.62	0.95	3.72	37.57 QAR	1.81	13.18
MASRAF AL RAYA	4.15	1.20	-0.72	-0.55	8.56	4.72	31.10 QAR	2.34	14.07
MESAIIEED PETRO	2.11	0.00	-1.64	-0.71	4.21	-16.14	26.45 QAR	1.72	25.89
OMAN									
BANK MUSCAT	0.396	-0.51	0.00	-2.01	16.07	-5.65	1.27 OMR	0.65	8.00
OMANTEL	0.620	0.00	-0.64	-1.27	-3.12	0.65	0.47 OMR	0.88	6.79
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	0.175	-2.23	-1.69	-1.69	0.57	-4.89	0.28 QAR	0.54	7.52
OMINVEST	0.332	0.00	0.61	-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
26-Aug-20	16.56%	11.44%	0.07%	0.34%	0.33%	3.57%	3.36%	7.52%	3.42%	2.93%
2-Sep-20	16.63%	11.63%	0.07%	0.33%	0.32%	3.62%	3.45%	7.66%	3.40%	2.93%

End of Report

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Leading Sector Performance

Kuwait

The market are flat today by + 0.05 % The leading sector best performance indices today are Technology 4.96 % Oil and Gas 1.77 % Insurance 1.34 % respectively

from YTD performance perspective the best sector performance are Consumer goods by 22.18 % while the bottom sector performance is Consumer services by -32.7 %

Telecommunication sector are up today by + 0.2 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 9.73 %

KSA

Saudi Armco are have positive performance today by + 0.56 %, SABIC flat performance today 0 %

STC are have positive performance today by + 1.03 %, Al Rajhi Bank have positive performance today by + 0.15 %

UAE

ETISALAT AD are up today by +0.36%, still outperform the market performance and act defensively with COVID19



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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