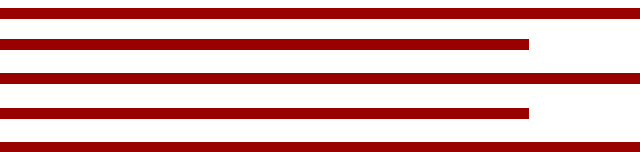
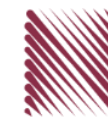


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

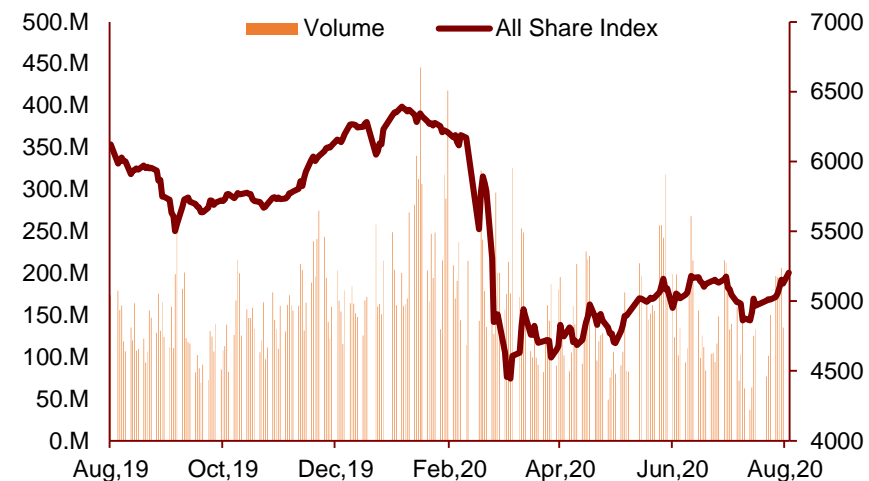
Sunday, August 16, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,202.64	1.49	1.49	4.72	1.40	-17.19	30.05 KWD	1.71	18.15
Kuwait Permier Index	5,742.03	1.58	1.58	6.03	2.41	-17.69	22.08 KWD	1.84	18.82
Kuwait Main Index	4,135.34	1.26	1.26	1.21	-1.31	-15.79	7.97 KWD	1.32	16.31
Kuwait Sector									
Banking	1,195.45	1.56	1.56	6.36	3.04	-19.37	17.67 KWD	1.84	19.37
Telecom	1,066.71	2.01	2.01	5.60	2.94	-4.48	3.27 KWD	1.92	12.77
Industrials	768.79	0.08	0.08	-0.62	-3.45	-17.11	2.75 KWD	1.25	13.74
Financial services	843.99	2.69	2.69	0.92	-2.76	-21.96	2.13 KWD	0.87	13.08
Real estate	881.92	1.84	1.84	4.26	-1.27	-16.69	1.90 KWD	1.02	22.59
Basic materials	792.93	0.86	0.86	4.00	-3.01	-12.68	0.71 KWD	1.12	17.09
Health care	839.19	0.00	0.00	0.00	2.21	-5.13	0.42 KWD	6.14	58.54
Consumer services	739.15	0.03	0.03	-2.13	-4.96	-31.07	0.38 KWD	1.92	9.01
Insurance	960.17	0.89	0.89	2.35	0.51	0.66	0.35 KWD	0.86	8.15
Consumer goods	765.63	-0.15	-0.15	5.83	3.98	20.16	0.23 KWD	1.64	33.32
Oil and Gas	1,091.27	1.46	1.46	-0.37	0.01	-11.87	0.23 KWD	1.60	10.30
Technology	447.41	0.00	0.00	-3.91	-9.56	-13.14	0.01 KWD	0.48	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	7,759.48	0.72	0.72	4.03	7.41	-7.51	8,526 SAR	5.63	25.51
Qatar (QE Index)	9,603.06	0.01	1.95	2.43	6.63	-7.96	508 QAR	1.66	59.63
Dubai (DFMGI)	2,183.37	1.30	3.59	6.47	5.72	-21.03	235 AED	1.00	10.06
Abu Dhabi (ADI)	4,413.27	0.61	1.23	2.52	2.97	-13.05	651 AED	4.29	14.86
Bahrain (BAX)	1,328.36	1.30	3.07	2.93	3.97	-17.50	14 BHD	1.18	15.63
MUSCAT SE INDEX	3,560.28	-0.14	-0.19	-0.19	1.29	-10.55	4 OMR	0.73	10.65
Developed Markets									
MSCI World Index	2,384.20	-0.25	1.20	3.44	8.28	1.09			
U.S. (S&P 500)	3,372.85	-0.02	0.64	3.11	8.79	4.40			
U.K. (FTSE 100)	6,090.04	-1.55	0.96	3.26	-1.29	-19.26			
Japan (Topix)	1,623.38	-0.05	4.95	8.51	4.14	-5.69			
Emerging Markets									
MSCI EM Index	1,093.16	-0.28	0.35	1.32	9.85	-1.93			
China (SSE Composite)	3,360.10	1.19	0.18	1.51	12.58	10.16			
India (Sensex)	37,877.34	-1.13	-0.43	0.72	8.48	-8.18			



What Move the GCC markets , Oil Prices

Oil prices edged lower on Sunday on worries that demand would recover more slowly than expected from COVID-19 pandemic lockdowns, while rising supply also overshadowed optimism over falling crude and fuel inventories.

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 fell 10 cents to \$44.86 per barrel,**

Kuwait Market

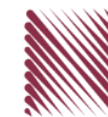
The market are closed today up by +1.49%, due to re-opening the local economy and the effect of demand recovery and production cut effect on the oil prices also the positive effect on inflows from MSCI in Nov 2020 . *Shamal Az-Zour Company K.S.C.P starting to traded publicly today in the Premier Market and joins the Utilities Sector the company turnover hit over 21.8 million KD , and closing price are 380 fils in first day trading .*

Saudi Market

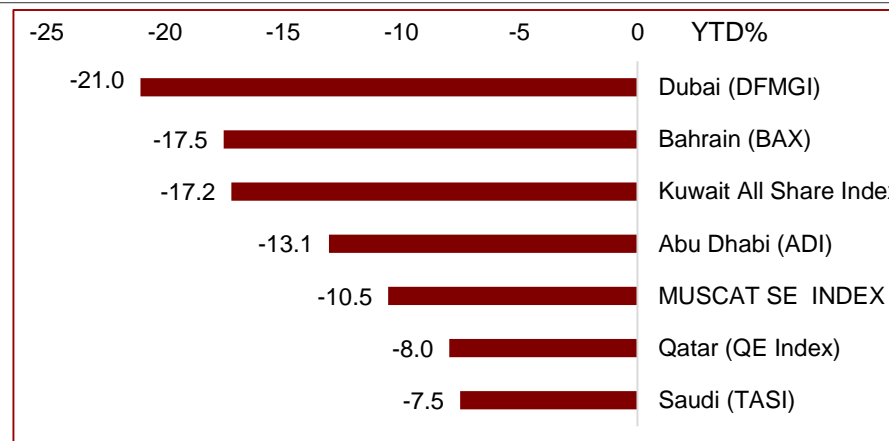
The Market closed up today by +0.72% , linked to the effect of the re-opining the local economy also the oil performance above 44\$ with the production cuts.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.826	1.47	1.47	4.69	0.61	-18.94	5.66 KWD	1.59	19.54
KFH	0.618	0.65	0.65	6.92	0.98	-16.18	4.74 KWD	2.52	23.56
Zain	0.587	2.26	2.26	6.73	5.77	-2.17	2.54 KWD	2.07	12.21
BOUBYAN BANK	0.556	-0.18	-0.18	4.71	4.51	-8.92	1.68 KWD	2.95	33.55
Agility	0.640	-0.16	-0.16	0.00	0.27	-10.02	1.30 KWD	1.11	14.58
Saudi Arabia									
ARAMCO	33.35	-0.45	-0.45	1.06	2.62	-5.39	6,699.82 SAR	6.53	27.32
SABIC	89.20	0.45	0.45	0.34	1.25	-5.01	266.39 SAR	1.60	0.00
STC	96.40	-0.31	-0.31	-0.82	-2.63	-5.30	193.39 SAR	3.07	18.07
AL-RAJHI BANK	63.80	1.59	1.59	8.32	12.72	-2.45	157.00 SAR	3.02	15.95
NCB	37.60	1.35	1.35	3.58	0.94	-23.65	111.30 SAR	1.52	10.37
United Arab Emirates									
ETISALAT.AD	16.70	0.48	0.48	0.24	1.09	1.96	145.24 AED	3.20	16.40
FAB.AD	11.20	1.08	1.08	2.56	-0.36	-26.12	122.30 AED	1.25	11.55
EMIRATES NBD	10.00	2.56	2.56	13.69	13.43	-22.69	63.48 AED	0.78	5.42
DB ISLAMIC BK	3.95	1.54	1.54	4.77	3.40	-28.31	28.60 AED	0.78	6.81
EMAAR PROPERT	2.80	0.72	0.72	8.95	2.56	-30.35	20.05 AED	0.36	3.91
Qatar									
QNB	18.22	0.22	0.22	1.11	4.66	-11.61	168.29 QAR	1.85	13.04
INDUSTRIES QAT	8.90	1.14	1.14	13.81	15.64	-13.42	53.85 QAR	1.67	33.27
QA ISLAMIC BK	16.09	-0.25	-0.25	-0.06	2.16	4.96	38.02 QAR	1.83	13.37
MASRAF AL RAYA	4.01	-0.30	-0.30	1.83	4.97	1.26	30.08 QAR	2.26	13.81
MESAEED PETRO	2.15	0.00	0.00	3.12	6.44	-14.34	27.01 QAR	1.75	26.45
OMAN									
BANK MUSCAT	0.356	-0.56	-0.56	1.71	5.95	-13.87	1.16 OMR	0.59	7.31
OMANTEL	0.616	0.00	0.00	0.66	-4.37	-0.65	0.46 OMR	0.87	6.70
BANK DHOFAR	0.101	1.00	1.00	1.00	-3.81	-17.89	0.30 QAR	0.44	19.61
NAT BANK OF OMAN	0.169	0.00	0.00	0.00	-2.87	-8.15	0.27 QAR	0.52	7.10
OMINVEST	0.338	0.00	0.00	-1.74	-0.59	2.42	0.27 QAR	0.88	8.54



Leading Sector Performance

Kuwait

The market are up today by + 1.49 %The leading sector best performance indices today are Financial services 2.69 % Telecom 2.01 % Real estate 1.84 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 20.16 % while the bottom sector performance is Consumer services by -31.07 %.

Telecommunication sector are up today by + 2.01 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 12.71 %.

KSA

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

STC are have negative performance today by -0.31 %, Al Rajhi Bank have positive performance today by + 1.59 %

UAE

ETISALAT AD are up today by 0.48% , still outperform the market performance and act defensively with COVID19

Summary - Absolute change in Foreign Ownership

	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
5-Aug-20	16.51%	11.46%	0.08%	0.36%	0.33%	3.57%	3.36%	7.58%	3.41%	2.92%
12-Aug-20	16.54%	11.44%	0.07%	0.35%	0.33%	3.57%	3.35%	7.52%	3.45%	2.92%

End of Report

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