

شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



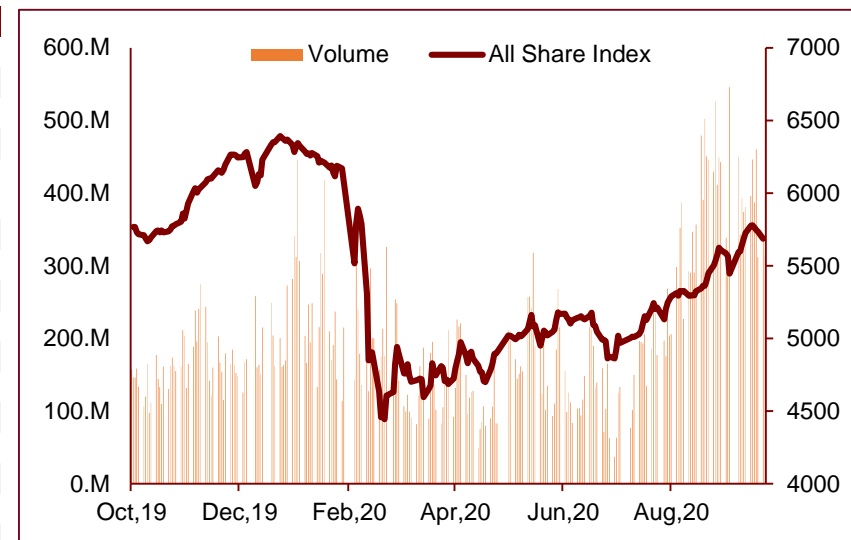
## GCC DAILY MARKET WRAP

Monday, October 19, 2020



### Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>		%	%	%	%	%			
Kuwait All Share Index	5,609.28	-1.35	-2.20	3.01	3.01	-10.72	33.01 KWD	1.94	19.10
Kuwait Premier Index	6,218.92	-1.52	-2.49	3.29	3.29	-10.85	24.44 KWD	2.07	20.98
Kuwait Main Index	4,398.42	-0.83	-1.33	2.21	2.21	-10.43	8.57 KWD	1.57	13.75
NIC 50	6,881.60	-1.33	-2.54	3.21	3.22	-7.73	28.60 KWD	1.57	15.56
<b>Kuwait Sector</b>									
Banking	1,310.49	-1.47	-2.49	3.07	3.07	-11.61	19.74 KWD	2.18	20.59
Telecom	1,093.20	-1.89	-2.16	3.99	3.99	-2.10	3.42 KWD	2.00	13.52
Industrials	833.43	-1.50	-1.58	4.47	4.47	-10.14	3.02 KWD	1.40	21.69
Financial services	951.16	-0.39	-1.18	4.95	4.95	-12.05	2.40 KWD	0.94	7.06
Real estate	935.93	-1.00	-2.92	-0.91	-0.91	-11.59	2.03 KWD	1.09	20.77
Basic materials	815.81	-1.82	-2.32	4.96	4.96	-10.16	0.74 KWD	1.23	19.42
Health care	821.04	0.00	0.00	0.11	0.11	-7.18	0.41 KWD	6.22	52.00
Consumer services	743.65	-0.94	-2.02	0.39	0.39	-30.65	0.39 KWD	1.86	13.92
Insurance	989.08	-0.73	-1.25	-5.63	-5.63	3.69	0.37 KWD	0.87	7.99
Consumer goods	763.59	0.04	-0.49	-0.38	-0.38	19.84	0.23 KWD	1.57	27.99
Oil and Gas	1,176.82	-0.63	-1.16	3.52	3.52	-4.96	0.25 KWD	1.78	10.88
Technology	519.44	2.00	0.00	1.42	1.42	0.85	0.01 KWD	0.58	0.00



### What Move the GCC markets ,

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>		%	%	%	%	%			
Saudi (TASI)	8,547.61	-0.15	-0.07	2.99	2.99	1.89	9,210 SAR	6.00	26.61
Qatar (QE Index)	9,999.66	-0.10	0.07	0.16	0.16	-4.02	541 QAR	1.70	12.50
Dubai (DFMGI)	2,208.81	1.26	0.65	-2.84	-2.84	-20.11	236 AED	1.25	10.63
Abu Dhabi (ADI)	4,559.55	0.28	0.11	0.92	0.92	-10.17	682 AED	4.60	15.55
Bahrain (BAX)	1,461.08	-1.07	-1.13	1.85	1.85	-9.26	16 BHD	1.83	13.50
MUSCAT SE INDEX	3,588.56	-0.39	-0.14	-0.72	-0.72	-9.86	4 OMR	0.75	11.38
<b>Developed Markets</b>									
MSCI World Index	2,440.14	0.17	-0.31	3.08	3.08	3.46			
U.S. (S&P 500)	3,483.81	0.01	0.19	3.59	3.59	7.83			
U.K. (FTSE 100)	5,902.58	-0.29	-1.90	0.62	0.62	-21.74			
Japan (Topix)	1,637.98	1.25	1.25	0.77	0.77	-4.84			
<b>Emerging Markets</b>									
MSCI EM Index	1,124.08	0.32	0.14	3.89	3.89	0.85			
China (SSE Composite)	3,312.67	-0.71	-0.74	2.91	2.91	8.58			
India (Sensex)	40,431.60	1.12	1.15	6.24	6.24	-1.97			

### Oil Prices

Oil prices fell on Monday after reports that China's third-quarter economic growth did not rise as much as expected, underscoring concerns that surging coronavirus cases globally are impacting demand in the world's largest oil importer. **Brent crude for December slipped 30 cents, or 0.7%, to \$42.63 a barrel.**

### Kuwait Market

The market are closed today down by -1.35%, Coronavirus concerns continue to weigh on sentiment too as infections surge in the region. Coronavirus restrictions are returning across Europe, with France declaring a state of emergency and London set to see tougher measures. increased uncertainty over the outlook for economic growth.

### Saudi Market

The Market closed today down by -0.15% and turn positive YTD performance leading all GCC markets , today market flat are linked to the slow economic recovery over the globe and fear form the Covid19 second wave and oil prices over \$42 a barrel.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



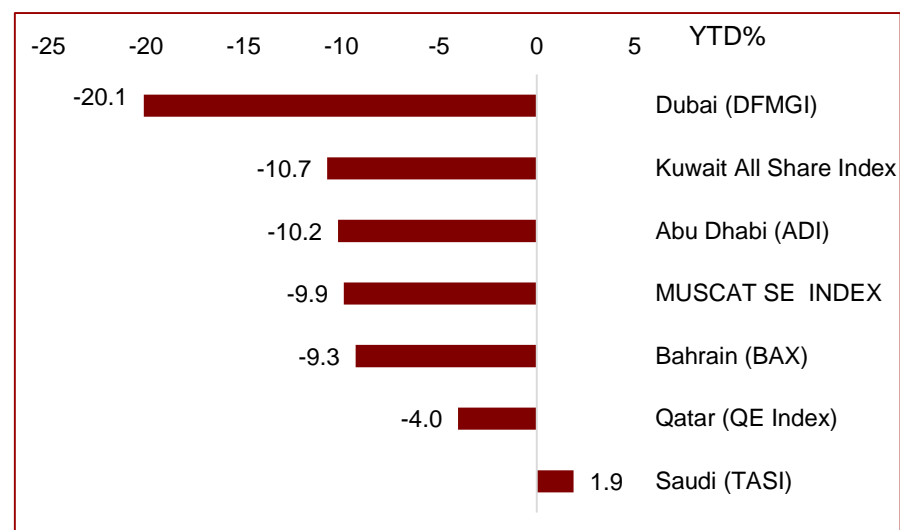
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	0.878	-1.24	-1.35	0.92	0.92	-13.84	6.09 KWD	1.72	21.34
KFH	0.687	-1.43	-2.97	3.93	3.93	-6.82	5.35 KWD	2.88	26.75
Zain	0.601	-2.12	-2.44	4.70	4.70	0.17	2.66 KWD	2.17	13.06
BOUBYAN BANK	0.623	0.00	-2.20	4.71	4.71	2.05	1.89 KWD	3.38	37.53
Agility	0.684	-1.44	-1.58	4.11	4.11	-3.84	1.41 KWD	1.20	20.85
<b>Saudi Arabia</b>									
ARAMCO	35.65	-0.56	-0.42	-0.70	-0.70	1.13	7,169.81 SAR	6.98	29.50
SABIC	97.00	-0.10	0.94	9.73	9.73	3.30	291.29 SAR	1.76	0.00
STC	104.40	0.97	0.38	3.98	3.98	2.55	206.79 SAR	3.31	19.43
AL-RAJHI BANK	66.80	-0.30	-0.15	1.67	1.67	2.14	167.50 SAR	3.22	17.07
NCB	40.50	-1.34	-2.64	9.02	9.02	-17.77	123.15 SAR	1.70	11.66
<b>United Arab Emirates</b>									
ETISALAT.AD	16.88	0.12	0.00	1.44	1.44	3.30	146.63 AED	3.24	16.63
FAB.AD	11.24	0.36	0.53	0.36	0.36	-25.59	122.30 AED	1.25	11.68
EMIRATES NBD	10.05	0.00	0.00	-5.63	-5.63	-22.69	63.48 AED	0.78	5.58
DB ISLAMIC BK	4.17	1.71	0.48	-3.47	-3.47	-24.32	29.69 AED	0.82	7.18
EMAAR PROPERT	2.66	1.92	1.14	-4.66	-4.66	-33.83	18.69 AED	0.34	3.67
<b>Qatar</b>									
QNB	17.75	0.00	-0.73	-2.36	-2.36	-13.70	164.00 QAR	1.78	13.80
INDUSTRIES QAT	9.71	-1.12	-0.71	-0.81	-0.81	-4.96	59.44 QAR	1.84	37.77
QA ISLAMIC BK	16.55	0.36	0.36	0.18	0.18	7.83	38.98 QAR	1.80	13.66
MASRAF AL RAYA	4.17	0.00	-0.19	0.17	0.17	5.23	31.25 QAR	2.25	14.28
MESAIIEED PETRO	2.10	0.62	0.38	1.15	1.15	-16.22	26.26 QAR	1.71	26.13
<b>OMAN</b>									
BANK MUSCAT	0.370	0.00	-0.54	3.35	3.35	-10.48	1.20 OMR	0.62	7.55
OMANTEL	0.620	0.00	0.00	-1.90	-1.90	0.65	0.46 OMR	0.88	6.79
BANK DHOFAR	0.109	1.87	5.83	3.81	3.81	-11.38	0.32 QAR	0.45	20.98
NAT BANK OF OMAN	0.165	-2.37	-2.37	0.00	0.00	-10.33	0.27 QAR	0.52	7.10
OMINVEST	0.322	-0.62	-2.44	-3.03	-3.03	-3.03	0.26 QAR	1.05	6.12

### Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
7-Oct-20	16.89%	12.21%	0.06%	0.19%	0.31%	3.62%	3.64%	8.01%	3.70%	2.96%
14-Oct-20	16.93%	12.38%	0.06%	0.12%	0.31%	3.59%	3.73%	8.14%	3.80%	2.96%

### End of Report

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### Leading Sector Performance

The market are down today by -1.35 % The leading sector bottom performance indices today are Telecom -1.89 % Basic materials -1.82 % Industrials -1.5 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 19.84 % while the bottom sector performance is Consumer services by -30.65 %.

Telecommunication sector are down today by -1.89 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 8.62 %.

### KSA

Saudi Armco are have negative performance today by -0.56 %, SABIC have negative performance today by -0.1 %.

STC are have positive performance today by + 0.97 %, Al Rajhi Bank have negative performance today by -0.3 %.

### UAE

ETISALAT AD up by +0.12%, still outperform the market performance in year to date basis and act defensively with COVID19



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