

Daily Markets Wrap,

NIC Research and Studies Dep - July 05, 2020

Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,142.34	0.36	0.36	0.23	0.23	-18.15	29.77 KWD	1.53	15.29
Kuwait Premier Index	5,624.29	0.44	0.44	0.31	0.31	-19.38	21.66 KWD	1.62	15.34
Kuwait Main Index	4,190.43	0.14	0.14	0.01	0.01	-14.67	8.11 KWD	1.27	15.14
Kuwait Sector									
Banking	1,164.38	0.33	0.33	0.36	0.36	-21.47	17.26 KWD	1.57	15.80
Telecom	1,041.89	0.41	0.41	0.54	0.54	-6.70	3.19 KWD	1.74	11.01
Industrials	799.67	0.35	0.35	0.43	0.43	-13.78	2.85 KWD	1.37	16.77
Financial services	855.65	0.16	0.16	-1.41	-1.41	-20.88	2.19 KWD	0.85	11.97
Real estate	895.19	0.65	0.65	0.22	0.22	-15.44	1.92 KWD	0.97	12.97
Basic materials	814.66	0.52	0.52	-0.35	-0.35	-10.29	0.73 KWD	1.19	18.18
Health care	839.19	2.21	2.21	2.21	2.21	-5.13	0.42 KWD	6.38	46.79
Consumer services	771.03	0.25	0.25	-0.86	-0.86	-28.09	0.40 KWD	1.55	8.88
Insurance	953.35	-0.32	-0.32	-0.21	-0.21	-0.05	0.35 KWD	0.81	8.27
Consumer goods	738.72	0.15	0.15	0.32	0.32	15.94	0.23 KWD	1.57	32.04
Oil and Gas	1,087.44	-0.30	-0.30	-0.34	-0.34	-12.18	0.23 KWD	1.58	8.96
Technology	494.70	0.00	0.00	0.00	0.00	-3.95	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)	7,388.49	1.04	1.04	2.28	2.28	-11.93	8,333 SAR	5.32	28.94
Qatar (QE Index)	9,187.17	-0.27	-0.27	2.18	2.18	-11.80	487 QAR	1.65	29.47
Dubai (DFMGI)	2,062.08	0.03	0.03	-0.15	-0.15	-25.42	222 AED	0.95	8.01
Abu Dhabi (ADI)	4,303.92	-0.18	-0.18	0.42	0.42	-15.21	487 AED	4.00	21.47
Bahrain (BAX)	1,277.52	0.25	0.25	-0.01	-0.01	-20.66	13 BHD	0.94	16.39
MUSCAT SE INDEX	3,508.47	-0.09	-0.09	-0.21	-0.21	-11.87	4 OMR	0.74	9.33
Developed Markets									
MSCI World Index	2,226.39	-0.06	-0.06	1.12	1.12	-5.60			
U.S. (S&P 500)	3,130.01	0.45	0.45	0.96	0.96	-3.12			
U.K. (FTSE 100)	6,157.30	-1.33	-1.33	-0.20	-0.20	-18.36			
Japan (Topix)	1,552.33	0.62	0.62	-0.41	-0.41	-9.82			
Emerging Markets									
MSCI EM Index	1,033.09	0.94	0.94	3.82	3.82	-7.32			
China (SSE Composite)	3,152.81	2.01	2.01	5.63	5.63	3.37			
India (Sensex)	36,021.42	0.50	0.50	3.17	3.17	-12.68			

What Move the GCC markets , Oil Prices

Crude prices fell on Sunday as the resurgence of the coronavirus globally and in the United States, the world's largest oil consumer, dimmed the prospects of fuel demand recovery.

Increases in the daily cases of the coronavirus, however, globally and in the United States pressured prices.

Brent crude futures were down 37 cents, or 0.9%, at \$42.77 a barrel

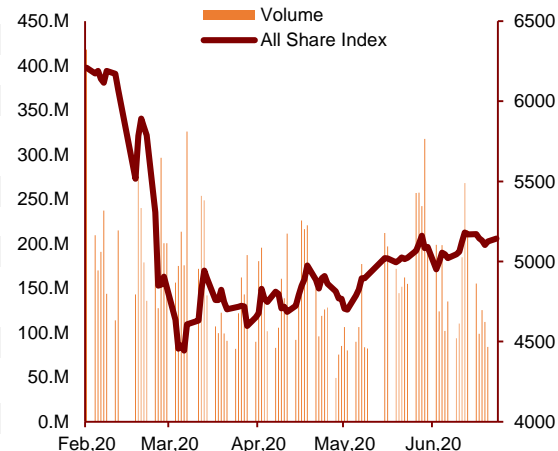
Kuwait Market

The market are closed today up today by +0.36%, affected by the two forces of hope in gradual re-opening the local economy and Worries about a second wave of Covid-19 cases in all over the globe and surging coronavirus infections.

Value traded over 14 Million KD.

Saudi Market

The Market closed in positive territory today by +1.04%, the performance are linked by re-opening the local economy indicating an economic recovery.



Notes

PBV is calculated by the last closing price divided by the latest fiscal period total equity per share and PBV for the index its calculated on the weighted average scaled by market cap , also PE are market cap weighted average.

Sources : Reuters , NIC

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.823	0.00	0.00	0.24	0.24	-19.24	5.64 KWD	1.44	14.43
KFH	0.611	0.33	0.33	-0.16	-0.16	-17.13	4.69 KWD	2.05	18.73
Zain	0.561	0.54	0.54	1.08	1.08	-6.50	2.43 KWD	1.87	11.13
BOUBYAN BANK	0.536	0.75	0.75	0.75	0.75	-12.20	1.62 KWD	2.49	27.05
Agility	0.738	0.41	0.41	0.55	0.55	-9.78	1.30 KWD	1.12	14.54
Saudi Arabia									
ARAMCO	32.80	-0.30	-0.30	0.92	0.92	-6.95	6,580.00 SAR	6.15	21.02
SABIC	89.30	0.11	0.11	1.36	1.36	-4.90	267.60 SAR	1.60	219.10
STC	99.00	0.51	0.51	0.00	0.00	-2.75	197.00 SAR	3.13	18.18
AL-RAJHI BANK	58.00	0.87	0.87	2.47	2.47	-11.31	143.75 SAR	2.90	14.36
NCB	37.25	0.13	0.13	0.00	0.00	-24.37	111.60 SAR	1.74	9.69
United Arab Emirates									
ETISALAT.AD	16.56	-1.31	-1.31	0.85	0.85	1.71	144.02 AED	3.19	16.85
FAB.AD	11.22	0.18	0.18	0.18	0.18	-25.73	122.52 AED	1.31	10.83
EMIRATES NBD	8.81	-1.01	-1.01	-0.56	-0.56	-32.23	55.65 AED	0.70	3.88
DB ISLAMIC BK	3.86	-0.52	-0.52	1.05	1.05	-29.95	27.95 AED	0.79	5.97
EMAAR PROPERT	2.69	0.37	0.37	-1.47	-1.47	-33.08	19.26 AED	0.36	3.09
Qatar									
QNB	17.78	-1.00	-1.00	2.82	2.82	-13.16	164.22 QAR	1.87	11.76
INDUSTRIES QAT	8.03	0.37	0.37	4.34	4.34	-21.89	48.58 QAR	1.52	23.00
QA ISLAMIC BK	15.90	-0.63	-0.63	1.08	1.08	3.85	37.57 QAR	1.85	13.25
MASRAF AL RAYA	3.95	-1.38	-1.38	3.40	3.40	-0.25	29.59 QAR	2.32	13.76
MESAEED PETRO	2.10	-0.19	-0.19	3.91	3.91	-16.37	26.32 QAR	1.82	27.26
OMAN									
BANK MUSCAT	0.334	-1.18	-1.18	-0.60	-0.60	-19.19	1.09 OMR	0.57	6.43
OMANTEL	0.636	0.00	0.00	-0.62	-0.62	3.25	0.48 OMR	0.84	6.14
BANK DHOFAR	0.105	0.00	0.00	0.00	0.00	-14.63	0.31 QAR	0.46	19.81
NAT BANK OF OMAN	0.174	0.00	0.00	0.00	0.00	-5.43	0.28 QAR	0.54	6.80
OMINVEST	0.332	0.00	0.00	1.18	1.18	4.24	0.28 QAR	0.89	8.69

Summary - Absolute change in Foreign Ownership

	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
24-Jun-20	16.45%	11.83%	0.09%	0.37%	0.35%	3.56%	3.37%	7.42%	3.27%	2.90%
1-Jul-20	16.57%	11.82%	0.09%	0.37%	0.35%	3.55%	3.39%	7.51%	3.33%	2.90%

Leading Sector Performance

Kuwait

The market are up by +0.36% today. The leading sector positive performance indices today Health Care , Real estate , Basic Material sector by +2.21% , +0.65 % and 0.52% respectively.

Telecommunication sector are down today by +0.41% and act defensively in Covid 19 and outperform Kuwait market index in YTD perspective by +11.45%.

Consumer goods are the best performance sector have YTD positive performance by +15.94%, the performance are linked to COVID 19 effect.

KFH has a positive price return performance spread over NBK in YTD perspective by +2.11%.

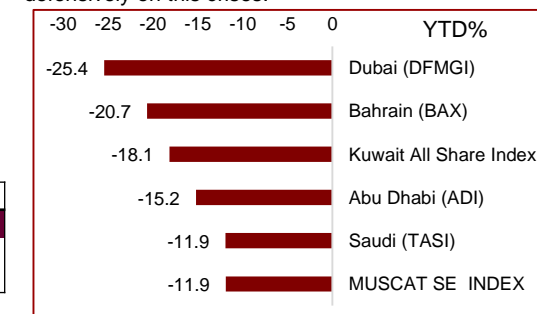
KSA

Saudi Aramco in negative performance today -0.30% and SABIC have positive performance today by +0.11% compared to yesterday close .

STC also have negative performance today by +0.51% and still less affected by the COVID 19 Crises as telecommunication sectors are outperform,

UAE

ETISALAT.AD are down by -1.31% today also less affected by the COVID 19 Crises as telecommunication sectors are outperform and act defensively on this crises.



End of Report

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