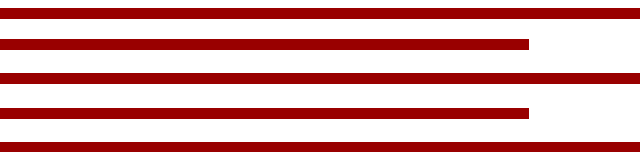


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

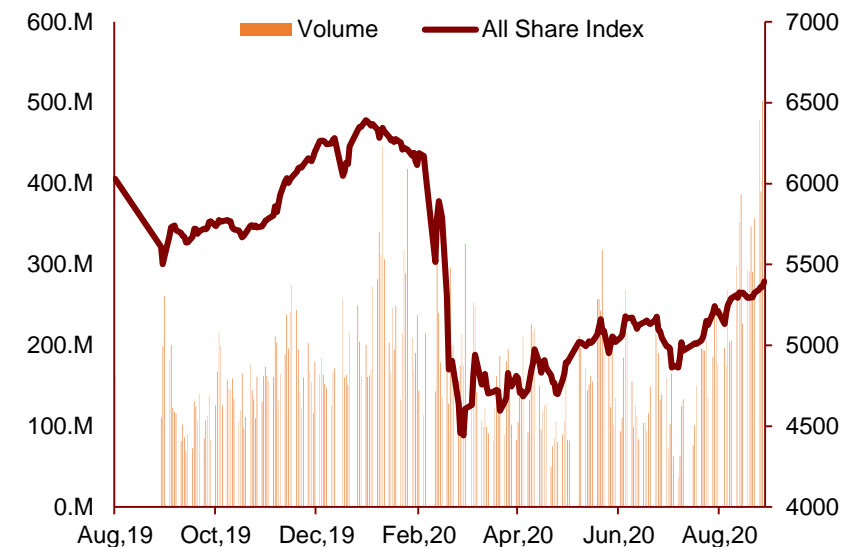
Wednesday, September 16, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,394.83	0.63	1.32	1.90	5.15	-14.13	31.26 KWD	1.80	18.13
Kuwait Permier Index	5,933.97	0.88	1.76	1.43	5.91	-14.88	22.89 KWD	1.92	19.62
Kuwait Main Index	4,328.82	-0.08	0.16	3.29	3.16	-11.97	8.37 KWD	1.48	14.04
Kuwait Sector									
Banking	1,254.13	0.83	1.79	1.78	8.14	-15.38	18.57 KWD	2.00	19.20
Telecom	1,055.16	0.46	0.04	-1.58	1.69	-5.63	3.24 KWD	1.89	12.75
Industrials	791.90	0.28	0.35	3.37	-0.56	-14.64	2.83 KWD	1.33	20.67
Financial services	912.32	-0.06	-0.30	4.14	5.04	-15.70	2.31 KWD	0.93	7.10
Real estate	923.15	1.33	3.34	5.85	3.52	-12.65	1.98 KWD	1.05	21.49
Basic materials	783.20	1.14	2.33	0.33	-4.20	-13.75	0.70 KWD	1.22	18.55
Health care	829.21	0.00	0.00	0.00	1.00	-6.26	0.41 KWD	6.19	52.21
Consumer services	737.45	0.50	1.20	2.92	-5.19	-31.23	0.38 KWD	1.88	13.05
Insurance	992.82	-0.41	0.49	2.55	3.92	4.08	0.37 KWD	0.87	7.95
Consumer goods	760.80	-1.10	-0.44	-3.84	3.88	20.04	0.23 KWD	1.56	28.27
Oil and Gas	1,121.26	-0.39	-1.31	2.27	2.76	-9.44	0.23 KWD	1.62	10.41
Technology	478.70	-8.61	-6.00	-3.66	-3.23	-7.06	0.01 KWD	0.54	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	8,311.21	-0.13	2.16	4.67	15.05	-0.93	9,188 SAR	6.08	26.80
Qatar (QE Index)	9,941.43	0.49	1.81	0.96	10.46	-4.66	532 QAR	1.72	96.19
Dubai (DFMGI)	2,301.13	0.35	1.35	2.49	11.42	-16.77	247 AED	25.46	10.80
Abu Dhabi (ADI)	4,505.33	-0.08	-0.31	-0.31	5.12	-11.24	665 AED	4.44	15.38
Bahrain (BAX)	1,417.83	1.19	2.02	2.67	10.98	-11.95	15 BHD	1.59	12.76
MUSCAT SE INDEX	3,662.51	-0.41	-0.65	-2.90	4.17	-8.00	4 OMR	0.75	11.13
Developed Markets									
MSCI World Index	2,407.97	0.48	1.68	-1.94	9.36	2.10			
U.S. (S&P 500)	3,401.20	0.51	1.80	-2.83	9.71	5.27			
U.K. (FTSE 100)	6,090.73	-0.24	0.97	2.13	-1.28	-19.25			
Japan (Topix)	1,644.35	0.21	0.47	1.62	5.49	-4.47			
Emerging Markets									
MSCI EM Index	1,112.62	0.76	1.91	1.01	11.81	-0.18			
China (SSE Composite)	3,283.92	-0.36	0.72	-3.29	10.03	7.67			
India (Sensex)	39,302.85	0.66	1.12	1.71	12.53	-4.76			



What Move the GCC markets ,

Oil Prices

Oil prices rose for a second day on Wednesday, gaining more than 2%, as a hurricane closed U.S. offshore oil and gas production and an industry report showed U.S. crude inventories decreased.

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 rose 85 cents, or 2.1%, to \$41.38 a barrel .**

Kuwait Market

The market are closed today up by +0.63% , after re-opening the local economy , oil performance , MSCI positive liquidity expectation , New IPO`s Boursa Kuwait Co ,

Saudi Market

The Market closed today down by -0.13% , 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



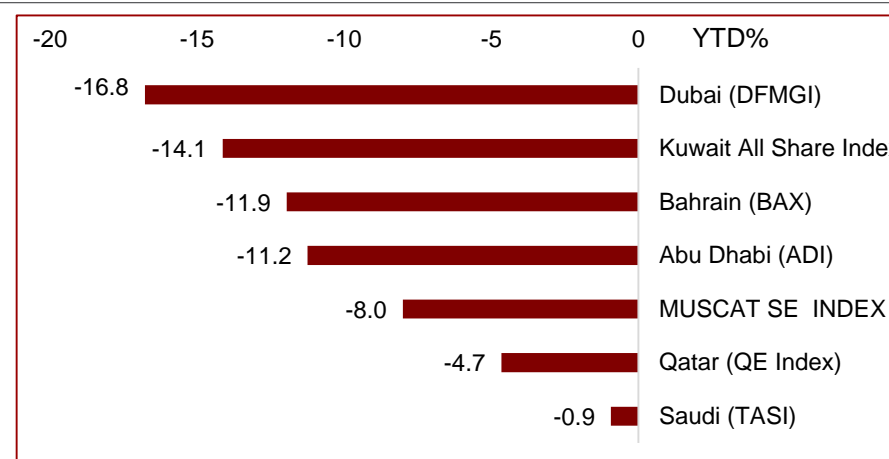
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	0.866	0.58	0.81	0.70	5.48	-15.02	5.93 KWD	1.67	20.67
KFH	0.634	0.63	1.44	1.28	3.59	-14.01	4.87 KWD	2.58	24.17
Zain	0.576	0.52	0.17	-2.54	3.60	-4.17	2.49 KWD	2.03	12.19
BOUBYAN BANK	0.593	0.51	-0.17	2.60	11.47	-2.86	1.80 KWD	3.14	35.54
Agility	0.629	0.64	0.32	0.80	-1.45	-11.57	1.28 KWD	1.08	18.77
Saudi Arabia									
ARAMCO	36.25	0.28	1.54	1.97	11.54	2.84	7,230.39 SAR	7.05	29.71
SABIC	89.40	0.45	1.48	1.59	1.48	-4.79	267.01 SAR	1.63	0.00
STC	103.00	0.98	3.83	7.29	4.04	1.18	204.01 SAR	3.24	18.54
AL-RAJHI BANK	68.30	-0.44	2.71	5.24	20.67	4.43	171.51 SAR	3.30	17.33
NCB	38.05	0.00	2.84	2.28	2.15	-22.74	114.16 SAR	1.56	10.65
United Arab Emirates									
ETISALAT.AD	16.58	0.36	-0.48	-0.36	0.00	0.86	144.19 AED	3.18	16.30
FAB.AD	11.26	-0.35	-1.23	-1.57	0.36	-25.59	122.96 AED	1.26	11.78
EMIRATES NBD	10.80	-0.46	0.93	0.00	21.90	-16.92	68.22 AED	0.84	6.03
DB ISLAMIC BK	4.31	0.00	-0.69	5.12	12.83	-21.78	31.21 AED	0.85	7.54
EMAAR PROPERT	2.99	2.05	2.75	3.82	9.52	-25.62	21.41 AED	0.38	4.12
Qatar									
QNB	17.94	0.79	0.56	-1.00	2.47	-13.45	165.70 QAR	1.83	12.77
INDUSTRIES QAT	10.40	-0.95	5.01	6.39	36.30	2.04	62.92 QAR	1.95	39.70
QA ISLAMIC BK	16.10	1.07	0.25	0.25	1.84	4.63	38.04 QAR	1.83	13.20
MASRAF AL RAYA	4.17	0.72	0.27	-0.22	8.93	5.08	31.28 QAR	2.35	14.22
MESAIEED PETRO	2.11	-0.14	0.91	-0.42	4.51	-15.90	26.52 QAR	1.72	26.00
OMAN									
BANK MUSCAT	0.366	-2.13	-4.66	-7.54	9.52	-10.97	1.20 OMR	0.61	7.67
OMANTEL	0.628	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	0.170	0.00	0.00	-4.49	-2.30	-7.61	0.28 QAR	0.52	7.14
OMINVEST	0.332	0.00	3.11	-0.60	-2.35	0.61	0.27 QAR	1.07	6.31

Summary - Absolute change in Foreign Ownership

	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
2-Sep-20	16.63%	11.63%	0.07%	0.33%	0.32%	3.62%	3.45%	7.66%	3.40%	2.93%
9-Sep-20	16.68%	11.69%	0.07%	0.32%	0.31%	3.65%	3.54%	7.72%	3.46%	2.94%

End of Report

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Leading Sector Performance

Kuwait

The market are up today by +0.63 % The leading sector best performance indices today are Real estate 1.33 % Basic materials 1.14 % Banking 0.83 % respectively

from YTD performance perspective the best sector performance are Consumer goods by 20.04 % while the bottom sector performance is Consumer services by -31.23 %.

Telecommunication sector are up today by +0.46 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by +8.5 %

KSA

Saudi Armco are have positive performance today by +0.28 %, SABIC have positive performance today by +0.45 %

STC are have positive performance today by +0.98 %, Al Rajhi Bank have negative performance today by -0.44 %

UAE

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



شركة الاستثمار الوطنية
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