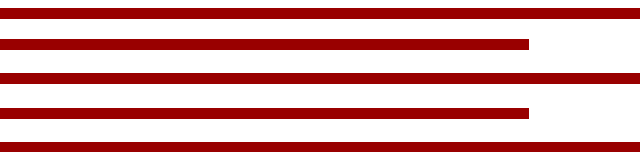


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

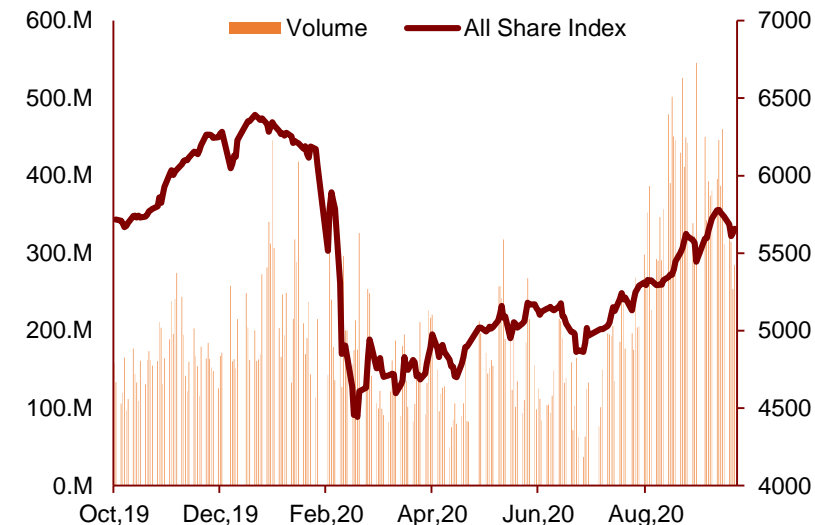
Thursday, October 22, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,618.43	-0.69	-1.99	3.23	3.23	-10.53	32.77 KWD	1.91	19.01
Kuwait Permier Index	6,230.87	-0.79	-2.30	3.49	3.49	-10.68	24.24 KWD	2.04	20.92
Kuwait Main Index	4,401.81	-0.38	-1.25	2.28	2.28	-10.36	8.53 KWD	1.53	13.58
NIC 50	6,899.90	-0.71	-2.35	3.41	3.42	-7.49	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,310.41	-0.95	-2.50	3.06	3.06	-11.62	19.58 KWD	2.14	20.57
Telecom	1,111.64	0.01	-0.50	5.74	5.74	-0.45	3.41 KWD	1.99	13.51
Industrials	836.56	-0.16	-1.21	4.86	4.86	-9.81	2.99 KWD	1.41	21.24
Financial services	947.08	-0.96	-1.60	4.50	4.50	-12.43	2.41 KWD	0.94	7.11
Real estate	926.34	-0.69	-3.92	-1.92	-1.92	-12.50	2.00 KWD	1.05	20.28
Basic materials	822.49	-0.23	-1.52	5.82	5.82	-9.43	0.73 KWD	1.22	19.14
Health care	821.04	0.00	0.00	0.11	0.11	-7.18	0.41 KWD	6.22	52.00
Consumer services	746.23	-0.36	-1.68	0.74	0.74	-30.41	0.39 KWD	1.83	13.94
Insurance	1,006.30	1.48	0.47	-3.99	-3.99	5.50	0.37 KWD	0.87	7.99
Consumer goods	767.67	-0.03	0.04	0.15	0.15	20.48	0.24 KWD	1.58	28.23
Oil and Gas	1,177.53	-0.08	-1.10	3.58	3.58	-4.90	0.25 KWD	1.76	10.88
Technology	509.25	-1.69	-1.96	-0.57	-0.57	-1.13	0.01 KWD	0.58	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	8,505.18	0.10	-0.57	2.48	2.48	1.38	9,104 SAR	5.92	26.27
Qatar (QE Index)	9,958.37	-0.07	-0.79	-0.70	-0.70	-4.85	539 QAR	1.69	12.50
Dubai (DFMGI)	2,185.55	0.66	-0.41	-3.87	-3.87	-20.95	235 AED	1.25	11.45
Abu Dhabi (ADI)	4,556.74	0.29	0.05	0.86	0.86	-10.23	680 AED	4.61	15.60
Bahrain (BAX)	1,447.53	-0.41	-2.05	0.91	0.91	-10.10	16 BHD	1.73	13.29
MUSCAT SE INDEX	3,557.40	-0.81	-0.99	-1.57	-1.57	-10.63	4 OMR	0.75	11.42
Developed Markets									
MSCI World Index	2,417.83	-0.20	-0.91	2.14	2.14	2.52			
U.S. (S&P 500)	3,435.56	0.00	-1.38	2.16	2.16	6.34			
U.K. (FTSE 100)	5,783.85	0.13	-2.29	-1.40	-1.40	-23.32			
Japan (Topix)	1,619.79	-1.09	0.13	-0.35	-0.35	-5.90			
Emerging Markets									
MSCI EM Index	1,137.91	0.35	1.23	5.17	5.17	2.09			
China (SSE Composite)	3,312.50	-0.38	-0.72	2.94	2.94	8.60			
India (Sensex)	40,558.49	-0.37	1.51	6.61	6.61	-1.62			



What Move the GCC markets ,

Oil Prices

Oil prices ticked up on Thursday but struggled to fully recover from the previous session's losses when a build in U.S. gasoline inventories signaled a deteriorating outlook for fuel demand as coronavirus cases soar. **Brent crude futures were up 44 cents at \$42.17 a barrel.**

Kuwait Market

The market are closed today down by -0.69%, with slow of re-opening the global economy , MSCI liquidity expectation, while Coronavirus concerns continue to weigh on sentiment too as infections surge in the region. Coronavirus restrictions are returning across Europe, increased uncertainty over the outlook for economic growth.

Saudi Market

The Market closed today up by +0.10% 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



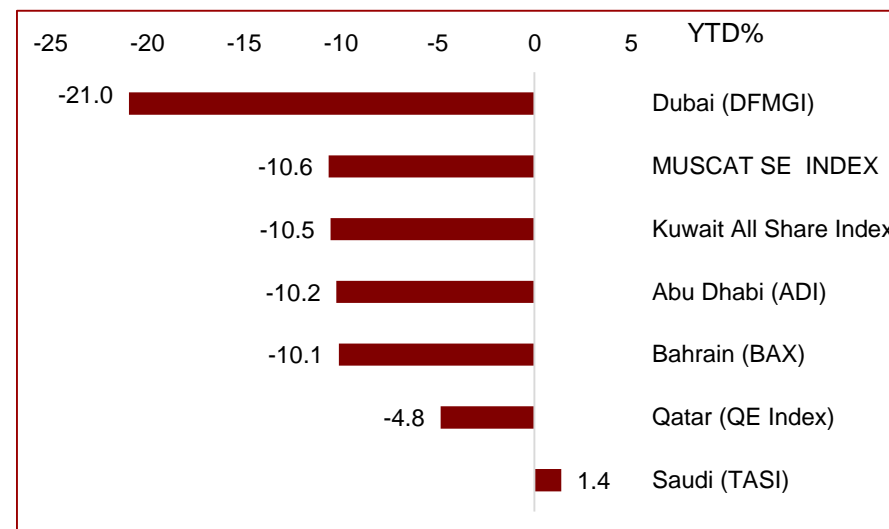
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.877	-0.90	-1.46	0.80	0.80	-13.94	6.06 KWD	1.71	21.25
KFH	0.689	-1.01	-2.68	4.24	4.24	-6.55	5.34 KWD	2.84	26.71
Zain	0.611	0.00	-0.81	6.45	6.45	1.83	2.64 KWD	2.15	13.00
BOUBYAN BANK	0.622	-0.32	-2.35	4.54	4.54	1.89	1.89 KWD	3.31	37.59
Agility	0.679	-0.44	-2.30	3.35	3.35	-4.54	1.38 KWD	1.17	20.49
Saudi Arabia									
ARAMCO	35.30	0.00	-1.40	-1.67	-1.67	0.14	7,060.00 SAR	6.88	29.25
SABIC	97.60	0.51	1.56	10.41	10.41	3.94	291.30 SAR	1.78	0.00
STC	106.00	2.71	1.92	5.58	5.58	4.13	206.40 SAR	3.28	19.30
AL-RAJHI BANK	67.00	0.75	0.15	1.98	1.98	2.45	166.25 SAR	3.20	17.02
NCB	40.25	0.75	-3.25	8.34	8.34	-18.27	119.85 SAR	1.63	11.30
United Arab Emirates									
ETISALAT.AD	17.08	0.59	0.71	2.16	2.16	4.03	147.67 AED	3.25	16.75
FAB.AD	11.20	0.18	-0.18	-0.36	-0.36	-26.12	122.09 AED	1.25	11.66
EMIRATES NBD	9.70	3.19	-3.48	-8.92	-8.92	-25.38	59.38 AED	0.72	8.00
DB ISLAMIC BK	4.11	0.00	-0.96	-4.86	-4.86	-25.41	29.76 AED	0.80	7.85
EMAAR PROPERT	2.61	-0.38	-0.76	-6.45	-6.45	-35.07	18.76 AED	0.34	3.68
Qatar									
QNB	17.80	0.56	-1.51	-3.13	-3.13	-14.38	163.42 QAR	1.76	13.76
INDUSTRIES QAT	9.69	0.93	-1.53	-1.63	-1.63	-5.75	58.06 QAR	1.80	36.92
QA ISLAMIC BK	16.54	0.18	0.43	0.24	0.24	7.89	39.00 QAR	1.80	13.68
MASRAF AL RAYA	4.22	0.45	0.93	1.30	1.30	6.41	31.49 QAR	2.27	14.40
MESAIEED PETRO	2.07	0.00	-1.19	-0.43	-0.43	-17.53	26.00 QAR	1.69	25.88
OMAN									
BANK MUSCAT	0.360	-1.10	-3.23	0.56	0.56	-12.90	1.18 OMR	0.61	7.43
OMANTEL	0.620	0.00	0.65	-1.27	-1.27	1.30	0.47 OMR	0.88	6.83
BANK DHOFAR	0.107	0.00	3.88	1.90	1.90	-13.01	0.32 QAR	0.47	20.98
NAT BANK OF OMAN	0.156	-3.03	-5.33	-3.03	-3.03	-13.04	0.27 QAR	0.51	6.93
OMINVEST	0.322	0.00	-1.83	-2.42	-2.42	-2.42	0.26 QAR	1.03	6.12

Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
14-Oct-20	16.93%	12.38%	0.06%	0.12%	0.31%	3.59%	3.73%	8.14%	3.80%	2.96%
21-Oct-20	16.73%	12.48%	0.06%	0.14%	0.31%	3.73%	3.71%	8.16%	4.00%	2.95%

End of Report

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Leading Sector Performance

The market are down today by -0.69 % The leading sector bottom performance indices today are Technology -1.69 % Financial services -0.96 % Banking -0.95 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 20.48 % while the bottom sector performance is Consumer services by -30.41 %.

Telecommunication sector are up today by + 0.01 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 10.08 %.

KSA

Saudi Armco are flat performance today 0 %, SABIC have positive performance today by + 0.51 %.

STC are have positive performance today by + 2.71 %, Al Rajhi Bank have positive performance today by + 0.75 %.

UAE

ETISALAT AD up by +0.59%, still outperform the market performance in year to date basis and act defensively with COVID19



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