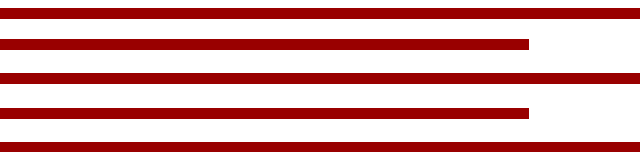


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

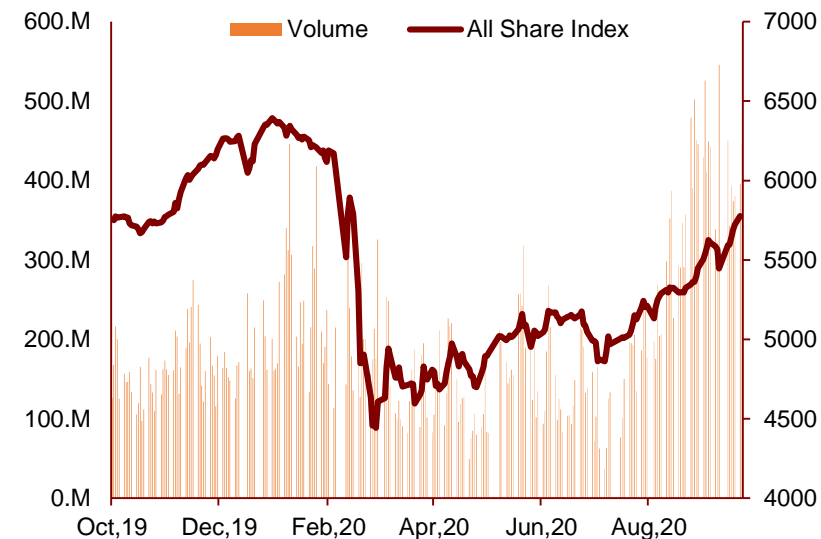
Monday, October 12, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,778.82	0.03	0.94	6.13	6.13	-8.02	33.44 KWD	1.94	19.35
Kuwait Premier Index	6,439.04	0.08	1.04	6.95	6.95	-7.70	24.81 KWD	2.07	21.36
Kuwait Main Index	4,464.14	-0.12	0.66	3.73	3.73	-9.09	8.63 KWD	1.54	13.57
NIC 50	7,096.00	0.04	0.99	6.87	6.88	-4.86	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,359.96	0.20	1.19	6.96	6.96	-8.27	20.06 KWD	2.17	20.87
Telecom	1,127.35	-0.10	1.17	7.23	7.23	0.95	3.46 KWD	2.03	13.69
Industrials	849.44	0.00	0.13	6.47	6.47	-8.42	3.03 KWD	1.37	21.64
Financial services	949.94	0.20	1.29	4.82	4.82	-12.16	2.37 KWD	0.93	7.08
Real estate	974.98	-0.78	-0.46	3.23	3.23	-7.90	2.11 KWD	1.14	21.52
Basic materials	831.32	-0.56	1.63	6.96	6.96	-8.45	0.74 KWD	1.24	19.47
Health care	821.04	0.11	0.11	0.11	0.11	-7.18	0.41 KWD	6.22	51.97
Consumer services	754.66	-0.12	0.14	1.88	1.88	-29.62	0.39 KWD	1.90	13.60
Insurance	1,002.04	-3.10	-0.09	-4.40	-4.40	5.05	0.38 KWD	0.92	8.28
Consumer goods	769.13	-0.26	0.73	0.34	0.34	20.71	0.24 KWD	1.57	28.26
Oil and Gas	1,160.33	0.36	0.21	2.07	2.07	-6.29	0.24 KWD	1.67	10.58
Technology	516.53	-1.11	-1.39	0.85	0.85	0.28	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)	8,544.94	0.37	1.57	2.96	2.96	1.86	9,215 SAR	6.04	26.72
Qatar (QE Index)	10,056.95	0.56	-0.09	0.33	0.33	-3.86	538 QAR	1.73	12.50
Dubai (DFMGI)	2,234.83	0.51	0.93	-1.70	-1.70	-19.17	240 AED	1.25	10.65
Abu Dhabi (ADI)	4,532.82	0.89	0.45	0.33	0.33	-10.70	675 AED	4.58	15.37
Bahrain (BAX)	1,478.51	0.40	1.38	3.07	3.07	-8.18	16 BHD	1.77	13.45
MUSCAT SE INDEX	3,584.22	-0.18	-0.55	-0.84	-0.84	-9.97	4 OMR	0.75	10.83
Developed Markets									
MSCI World Index	2,447.76	0.84	0.00	3.40	3.40	3.79			
U.S. (S&P 500)	3,477.13	0.00	3.84	3.39	3.39	7.63			
U.K. (FTSE 100)	6,026.79	0.17	0.17	2.74	2.74	-20.09			
Japan (Topix)	1,643.35	-0.24	-0.24	1.10	1.10	-4.53			
Emerging Markets									
MSCI EM Index	1,122.51	0.45	0.00	3.74	3.74	0.70			
China (SSE Composite)	3,358.47	2.64	2.64	4.36	4.36	10.11			
India (Sensex)	40,593.80	0.21	0.27	6.70	6.70	-1.54			



What Move the GCC markets ,

Oil Prices

Oil prices fell on Monday as force majeure at Libya's largest oilfield was lifted, a Norwegian strike affecting production ended and U.S. producers began restoring output after Hurricane Delta. **Brent crude was down 48 cents to \$42.37 a barrel.**

Kuwait Market

The market are closed today up by +0.03%, re-opening the local economy , more liquidity expected in MSCI , also still with fear of the second wave Covid19 More than 1 million people have died of Covid-19 as of Tuesday, with fatalities and infections surging in several countries.

Saudi Market

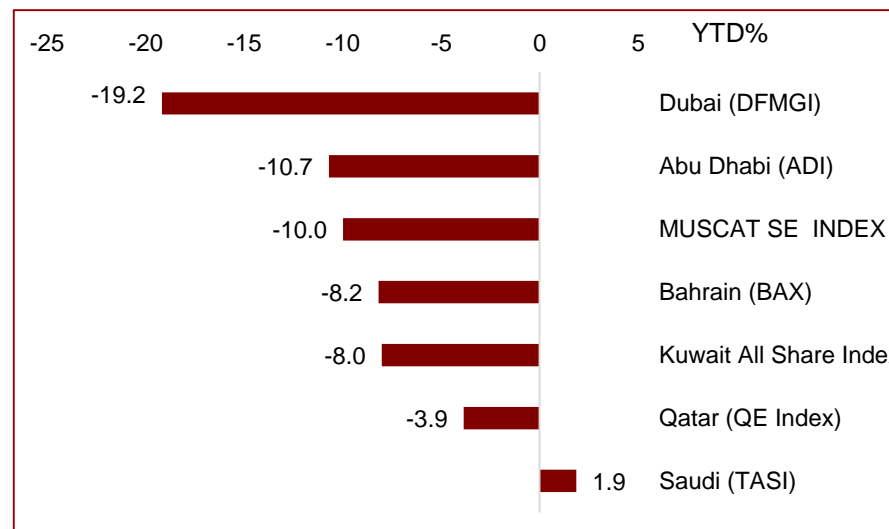
The Market closed today up by +0.37% and turn positive YTD performance leading all GCC markets , linked to the slow economic recovery over the globe and re-opening the global economy and oil prices over \$42 a barrel.

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	0.913	0.00	1.00	4.94	4.94	-10.41	6.25 KWD	1.76	21.92
KFH	0.712	0.28	0.85	7.72	7.72	-3.43	5.44 KWD	2.89	27.24
Zain	0.624	-0.16	1.63	8.71	8.71	4.00	2.70 KWD	2.20	13.30
BOUBYAN BANK	0.628	1.29	1.45	5.55	5.55	2.87	1.88 KWD	3.29	37.35
Agility	0.706	-0.14	0.14	7.46	7.46	-0.75	1.43 KWD	1.22	21.24
Saudi Arabia									
ARAMCO	35.95	0.00	-0.14	0.14	0.14	1.99	7,189.23 SAR	7.01	29.67
SABIC	98.50	0.72	7.18	11.43	11.43	4.90	293.37 SAR	1.79	0.00
STC	106.40	0.95	2.31	5.98	5.98	4.52	210.78 SAR	3.35	19.43
AL-RAJHI BANK	67.70	0.89	1.96	3.04	3.04	3.52	167.73 SAR	3.23	16.94
NCB	39.25	1.95	1.95	5.65	5.65	-20.30	115.49 SAR	1.58	10.79
United Arab Emirates									
ETISALAT.AD	16.86	0.00	-0.24	1.20	1.20	3.06	146.63 AED	3.23	16.63
FAB.AD	11.22	1.45	0.54	-0.18	-0.18	-25.99	120.78 AED	1.24	11.53
EMIRATES NBD	10.45	0.97	-0.48	-1.88	-1.88	-19.62	65.38 AED	0.80	5.75
DB ISLAMIC BK	4.22	-0.24	-0.24	-2.31	-2.31	-23.41	30.63 AED	0.84	7.40
EMAAR PROPERT	2.69	0.75	1.51	-3.58	-3.58	-33.08	19.12 AED	0.34	3.75
Qatar									
QNB	18.10	1.34	-0.94	-1.10	-1.10	-12.58	164.94 QAR	1.82	12.85
INDUSTRIES QAT	9.97	0.71	-0.50	0.41	0.41	-3.79	59.89 QAR	1.85	38.08
QA ISLAMIC BK	16.62	-0.18	-0.54	0.36	0.36	8.02	39.34 QAR	1.89	13.76
MASRAF AL RAYA	4.21	0.19	0.26	1.18	1.18	6.29	31.50 QAR	2.37	14.49
MESAIEED PETRO	2.12	0.33	-0.19	1.49	1.49	-15.94	26.48 QAR	1.72	26.35
OMAN									
BANK MUSCAT	0.368	0.00	0.55	2.79	2.79	-10.97	1.20 OMR	0.61	7.51
OMANTEL	0.632	0.00	0.64	0.00	0.00	2.60	0.47 OMR	0.89	6.92
BANK DHOFAR	0.103	0.00	0.00	-1.90	-1.90	-16.26	0.31 QAR	0.45	20.20
NAT BANK OF OMAN	0.169	0.00	0.00	2.42	2.42	-8.15	0.27 QAR	0.52	7.10
OMINVEST	0.324	0.00	3.11	0.61	0.61	0.61	0.27 QAR	1.07	6.31



Leading Sector Performance

The market are up today by + 0.03 % The leading sector best performance indices today are Oil and Gas 0.36 % Financial services 0.2 % Banking 0.2 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 20.71 % while the bottom sector performance is Consumer services by -29.62 %.

Telecommunication sector are down today by -0.1 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 8.97 %.

KSA

Saudi Armco are flat performance today 0 %, SABIC have positive performance today by + 0.72 %

STC are have positive performance today by + 0.95 %, Al Rajhi Bank have positive performance today by + 0.89 %

UAE

ETISALAT AD flat today, still outperform the market performance in year to date basis and act defensively with COVID19

Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
30-Sep-20	16.84%	12.11%	0.07%	0.18%	0.31%	3.64%	3.60%	7.93%	3.65%	2.94%
7-Oct-20	16.89%	12.21%	0.06%	0.19%	0.31%	3.62%	3.64%	8.01%	3.70%	2.96%

End of Report

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