



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

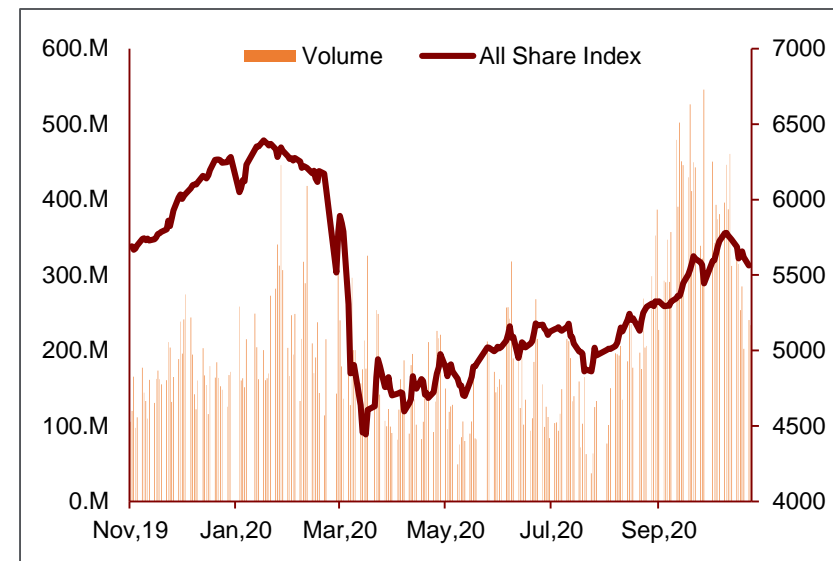
Monday, October 26, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,468.88	-1.69	-2.66	0.43	0.43	-12.95	32.58 KWD	1.90	18.69
Kuwait Premier Index	6,036.63	-1.97	-3.12	0.26	0.26	-13.47	24.07 KWD	2.02	20.52
Kuwait Main Index	4,343.98	-0.86	-1.31	0.94	0.94	-11.54	8.51 KWD	1.53	13.50
NIC 50	6,706.20	-1.72	-3.17	0.18	0.19	-10.08	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,269.06	-2.08	-3.16	-0.19	-0.19	-14.41	19.42 KWD	2.12	20.14
Telecom	1,087.85	-0.99	-2.14	3.48	3.48	-2.58	3.41 KWD	1.99	13.37
Industrials	821.10	-1.08	-1.85	2.92	2.92	-11.47	2.99 KWD	1.42	21.03
Financial services	925.44	-1.46	-2.28	2.11	2.11	-14.43	2.39 KWD	0.93	7.02
Real estate	902.96	-1.64	-2.52	-4.40	-4.40	-14.71	1.99 KWD	1.04	20.01
Basic materials	798.95	-1.71	-2.86	2.79	2.79	-12.02	0.73 KWD	1.21	18.87
Health care	821.04	0.00	0.00	0.11	0.11	-7.18	0.41 KWD	6.22	52.00
Consumer services	740.22	-0.43	-0.81	-0.07	-0.07	-30.97	0.39 KWD	1.83	13.84
Insurance	1,010.12	-0.40	0.38	-3.63	-3.63	5.90	0.37 KWD	0.88	8.11
Consumer goods	761.81	-0.09	-0.76	-0.61	-0.61	19.56	0.24 KWD	1.57	27.99
Oil and Gas	1,169.63	-0.21	-0.67	2.89	2.89	-5.54	0.25 KWD	1.76	10.80
Technology	509.25	0.00	0.00	-0.57	-0.57	-1.13	0.01 KWD	0.57	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	8,155.31	0.01	-4.11	-1.73	-1.73	-2.79	9,110 SAR	5.92	26.13
Qatar (QE Index)	9,807.53	-0.01	-1.47	-1.79	-1.79	-5.89	534 QAR	1.67	12.50
Dubai (DFMGI)	2,166.51	-0.50	-0.87	-4.71	-4.71	-21.64	237 AED	1.25	11.05
Abu Dhabi (ADI)	4,624.85	1.24	1.49	2.36	2.36	-8.88	680 AED	4.57	15.62
Bahrain (BAX)	1,434.95	-0.02	-0.87	0.03	0.03	-10.88	16 BHD	1.72	13.14
MUSCAT SE INDEX	3,563.92	-0.01	0.18	-1.40	-1.40	-10.48	4 OMR	0.75	11.40
Developed Markets									
MSCI World Index	2,430.54	0.39	0.00	2.67	2.67	3.06			
U.S. (S&P 500)	3,465.39	0.00	-0.53	3.04	3.04	7.26			
U.K. (FTSE 100)	5,834.50	-0.44	-0.44	-0.54	-0.54	-22.64			
Japan (Topix)	1,618.98	-0.39	-0.39	-0.40	-0.40	-5.95			
Emerging Markets									
MSCI EM Index	1,136.45	-0.01	0.00	5.03	5.03	1.95			
China (SSE Composite)	3,251.12	-0.82	-0.82	1.03	1.03	6.59			
India (Sensex)	40,145.50	-1.33	-1.22	5.57	5.57	-2.58			



What Move the GCC markets ,

Oil Prices

Oil prices fell on Monday, extending last week's losses, as increasing coronavirus cases in the United States and Europe raised worries about energy demand, while Libya's fast growing production also weighed on prices. **Brent was down 75 cents, or 1.8%, at \$41.02 per barrel**

Kuwait Market

The market are closed today down by -1.69%, 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 flat by +0.01% and turn negative YTD performance again, today market Performance are linked to the slow economic recovery over the globe and fear form the Covid19 second wave and oil prices over \$41 a barrel.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



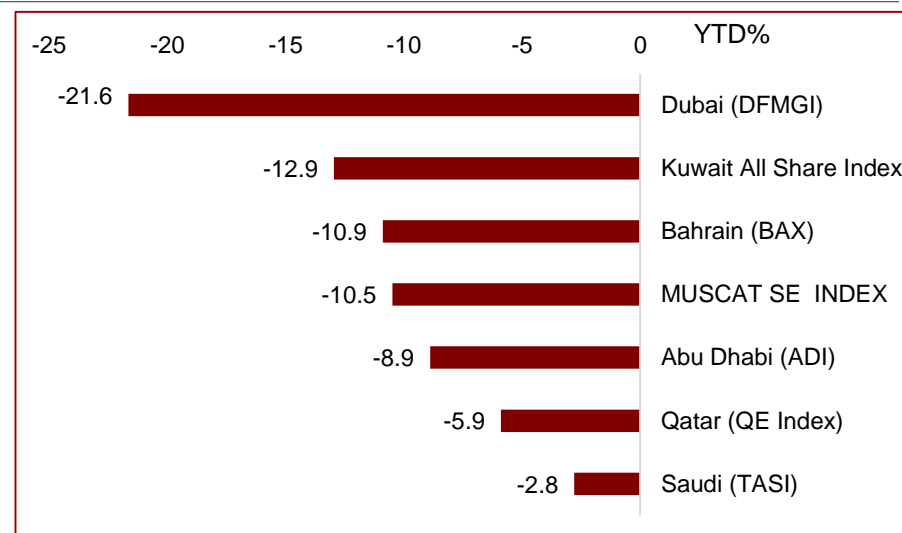
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.849	-2.41	-3.19	-2.41	-2.41	-16.69	6.01 KWD	1.69	20.89
KFH	0.662	-2.50	-3.92	0.15	0.15	-10.21	5.29 KWD	2.81	26.06
Zain	0.597	-0.83	-2.29	4.01	4.01	-0.50	2.64 KWD	2.15	12.81
BOUBYAN BANK	0.607	-0.98	-2.41	2.02	2.02	-0.57	1.88 KWD	3.30	36.92
Agility	0.668	-1.18	-1.62	1.67	1.67	-6.09	1.38 KWD	1.17	20.31
Saudi Arabia									
ARAMCO	34.10	-1.16	-3.40	-5.01	-5.01	-3.26	7,059.81 SAR	6.88	29.09
SABIC	92.60	-0.64	-5.12	4.75	4.75	-1.38	292.79 SAR	1.79	0.00
STC	103.00	0.00	-2.83	2.59	2.59	1.18	211.99 SAR	3.37	19.78
AL-RAJHI BANK	66.00	-0.30	-1.49	0.46	0.46	0.92	167.50 SAR	3.23	17.10
NCB	39.45	-0.38	-1.99	6.19	6.19	-19.90	120.75 SAR	1.65	11.28
United Arab Emirates									
ETISALAT.AD	17.02	0.71	-0.47	2.04	2.04	3.91	148.54 AED	3.17	16.44
FAB.AD	11.34	0.71	1.43	1.07	1.07	-25.07	122.30 AED	1.25	11.74
EMIRATES NBD	9.51	-1.96	-1.96	-10.70	-10.70	-26.85	61.27 AED	0.74	8.25
DB ISLAMIC BK	4.12	0.49	0.24	-4.63	-4.63	-25.23	29.76 AED	0.80	7.83
EMAAR PROPERT	2.59	0.00	-0.77	-7.17	-7.17	-35.57	18.69 AED	0.33	3.64
Qatar									
QNB	17.80	0.68	-0.56	-2.75	-2.75	-14.04	164.48 QAR	1.77	13.75
INDUSTRIES QAT	9.45	-1.33	-1.95	-3.55	-3.55	-7.59	58.64 QAR	1.82	36.83
QA ISLAMIC BK	16.40	0.00	-1.33	-1.09	-1.09	6.46	39.10 QAR	1.80	13.59
MASRAF AL RAYA	4.24	-1.00	1.92	3.37	3.37	8.59	31.66 QAR	2.28	14.68
MESAIEED PETRO	1.92	-0.16	-5.85	-6.25	-6.25	-22.35	26.02 QAR	1.69	24.04
OMAN									
BANK MUSCAT	0.360	0.00	0.00	0.56	0.56	-12.90	1.17 OMR	0.60	7.35
OMANTEL	0.620	-0.64	0.00	-1.90	-1.90	0.65	0.47 OMR	0.88	6.83
BANK DHOFAR	0.103	-3.74	-3.74	-1.90	-1.90	-16.26	0.32 QAR	0.47	20.98
NAT BANK OF OMAN	0.160	0.00	2.56	-3.03	-3.03	-13.04	0.26 QAR	0.49	6.72
OMINVEST	0.330	2.48	2.48	0.00	0.00	0.00	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 -1.69 % The leading sector bottom performance indices today are Banking -2.08 % Basic materials -1.71 % Real estate -1.64 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 19.56 % while the bottom sector performance is Consumer services by -30.97 %.

Telecommunication sector are down today by -0.99 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 10.37 %.

KSA

Saudi Armco are have negative performance today by -1.16 %, SABIC have negative performance today by -0.64 %.

STC are flat performance today 0 %, Al Rajhi Bank have negative performance today by -0.3 %.

UAE

ETISALAT AD down by +0.71%, still outperform the market performance in year to date basis and act defensively with COVID19



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