



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

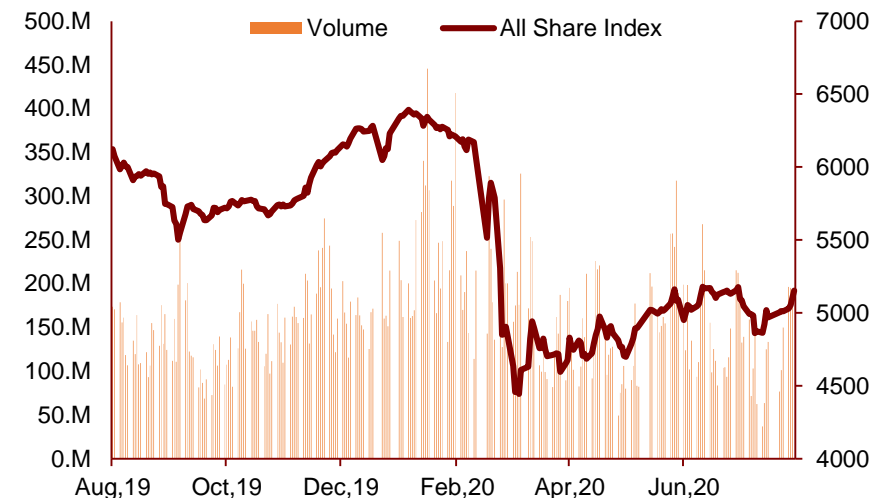
Wednesday, August 12, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,152.26	1.03	2.84	3.70	0.42	-17.99	29.51 KWD	1.66	17.70
Kuwait Permier Index	5,682.77	1.33	3.62	4.94	1.35	-18.54	21.58 KWD	1.79	18.65
Kuwait Main Index	4,102.63	0.21	0.73	0.41	-2.09	-16.46	7.93 KWD	1.29	15.14
Kuwait Sector									
Banking	1,184.27	1.44	4.02	5.37	2.08	-20.12	17.27 KWD	1.79	19.25
Telecom	1,043.45	0.63	2.59	3.30	0.69	-6.56	3.18 KWD	1.86	12.69
Industrials	772.91	0.77	-0.03	-0.09	-2.93	-16.67	2.74 KWD	1.23	16.91
Financial services	827.72	0.49	0.01	-1.02	-4.63	-23.46	2.13 KWD	0.82	11.57
Real estate	867.62	0.46	0.94	2.57	-2.87	-18.05	1.86 KWD	0.98	16.63
Basic materials	789.73	0.54	2.96	3.58	-3.40	-13.03	0.70 KWD	1.13	16.84
Health care	839.19	0.00	0.00	0.00	2.21	-5.13	0.42 KWD	6.29	47.76
Consumer services	736.67	-1.47	-1.03	-2.46	-5.28	-31.30	0.39 KWD	1.43	7.94
Insurance	962.55	-0.60	-0.03	2.60	0.75	0.91	0.36 KWD	0.84	8.12
Consumer goods	781.34	0.05	7.45	8.00	6.11	22.63	0.24 KWD	1.67	33.95
Oil and Gas	1,109.04	-0.23	6.25	1.26	1.64	-10.43	0.23 KWD	1.56	9.11
Technology	447.41	-3.91	-3.91	-3.91	-9.56	-13.14	0.01 KWD	0.50	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	7,645.55	0.25	1.94	2.50	5.83	-8.86	8,471 SAR	5.60	25.41
Qatar (QE Index)	9,553.10	0.31	1.50	1.97	6.16	-8.37	501 QAR	1.65	33.54
Dubai (DFMGI)	2,115.31	0.86	0.36	3.15	2.42	-23.49	226 AED	0.98	8.95
Abu Dhabi (ADI)	4,359.58	-0.20	0.00	1.27	1.72	-14.11	653 AED	4.38	14.65
Bahrain (BAX)	1,314.55	0.54	2.00	1.86	2.89	-18.36	14 BHD	1.07	15.68
MUSCAT SE INDEX	3,566.90	-0.16	-0.03	-0.03	1.45	-10.41	4 OMR	0.73	10.71
Developed Markets									
MSCI World Index	2,359.47	-0.06	0.15	2.36	7.16	0.04			
U.S. (S&P 500)	3,333.69	-0.80	-0.52	1.91	7.53	3.19			
U.K. (FTSE 100)	6,240.33	1.40	3.45	5.81	1.14	-17.26			
Japan (Topix)	1,605.53	1.23	3.80	7.32	3.00	-6.73			
Emerging Markets									
MSCI EM Index	1,091.23	0.44	0.18	1.14	9.66	-2.10			
China (SSE Composite)	3,319.27	-0.63	-1.04	0.28	11.21	8.82			
India (Sensex)	38,369.63	-0.10	0.87	2.03	9.89	-6.99			



What Move the GCC markets ,

Oil Prices

Oil prices rose on Wednesday after an industry report showed U.S. crude inventories last week fell more than analysts had expected, bolstering hopes that fuel demand in the world's biggest economy can weather the coronavirus pandemic.

On the supply side, Iraq said on Friday it would cut its oil output by a further 400,000 barrels per day. **Brent crude was up 61 cents, or 1.4%, at \$45.11 a barrel**

Kuwait Market

The market are closed today up by +1.03%, the hope of re- opening the local economy and the effect of demand recovery and production cut effect on the oil prices also the positive effect on inflows from MSCI in Nov 2020 . **Value traded over 44 Million KD.**

Saudi Market

The Market closed up today by +0.25% , linked to the effect of the re-opening the local economy also the oil performance above 45\$ with the production cuts.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



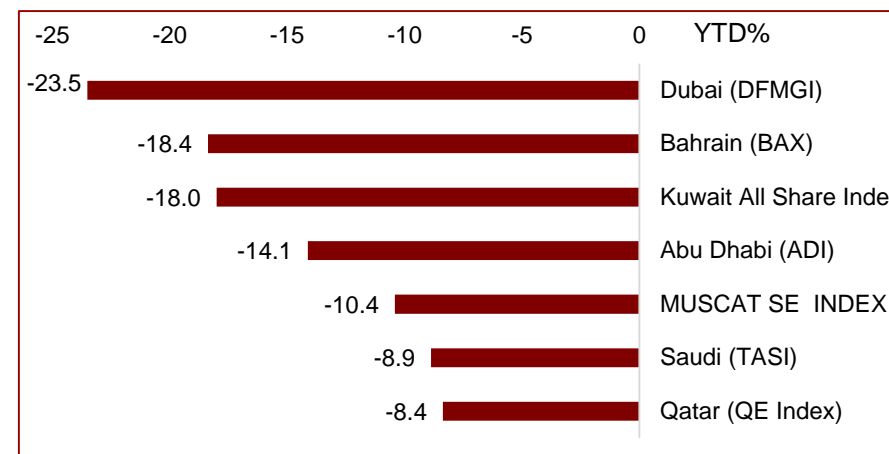
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.819	1.36	3.54	3.80	-0.24	-19.63	5.53 KWD	1.56	19.40
KFH	0.617	1.98	4.93	6.75	0.82	-16.31	4.64 KWD	2.46	23.22
Zain	0.572	0.53	3.25	4.00	3.06	-4.67	2.46 KWD	2.01	12.11
BOUBYAN BANK	0.559	0.90	3.90	5.27	5.08	-8.43	1.68 KWD	2.94	33.37
Agility	0.648	0.93	0.62	1.25	1.53	-8.90	1.30 KWD	1.12	14.61
Saudi Arabia									
ARAMCO	33.15	-0.45	0.61	0.45	2.00	-5.96	6,660.36 SAR	6.49	27.28
SABIC	88.20	0.34	0.46	-0.79	0.11	-6.07	263.71 SAR	1.58	0.00
STC	96.70	0.21	-0.31	-0.51	-2.32	-5.01	193.01 SAR	3.07	17.94
AL-RAJHI BANK	62.50	0.97	5.04	6.11	10.42	-4.43	154.76 SAR	2.98	15.31
NCB	37.00	0.27	0.82	1.93	-0.67	-24.87	110.71 SAR	1.51	10.29
United Arab Emirates									
ETISALAT.AD	16.52	-0.12	-0.96	-0.72	0.12	0.98	143.85 AED	3.17	16.32
FAB.AD	10.98	-0.72	-1.26	0.55	-2.31	-27.57	120.78 AED	1.24	11.53
EMIRATES NBD	9.50	2.59	1.60	7.47	7.22	-26.92	58.49 AED	0.72	5.15
DB ISLAMIC BK	3.85	0.79	0.26	2.12	0.79	-30.13	27.66 AED	0.76	6.69
EMAAR PROPERT	2.70	0.37	0.37	5.06	-1.10	-32.84	19.26 AED	0.36	3.11
Qatar									
QNB	18.15	0.83	-0.22	0.78	4.31	-11.90	165.73 QAR	1.83	12.92
INDUSTRIES QAT	8.64	0.71	7.33	10.49	12.27	-15.95	51.74 QAR	1.61	32.43
QA ISLAMIC BK	16.10	-0.31	-0.06	0.37	2.60	5.41	38.04 QAR	1.83	13.38
MASRAF AL RAYA	3.98	0.23	1.02	1.02	4.14	0.45	29.69 QAR	2.24	13.64
MESAIIEED PETRO	2.13	1.43	1.92	1.68	4.95	-15.54	26.30 QAR	1.83	27.27
OMAN									
BANK MUSCAT	0.358	0.00	2.29	2.29	6.55	-13.39	1.16 OMR	0.60	7.31
OMANTEL	0.612	0.00	1.32	1.32	-3.75	0.00	0.46 OMR	0.87	6.75
BANK DHOFAR	0.100	0.00	0.00	0.00	-4.76	-18.70	0.30 QAR	0.44	19.61
NAT BANK OF OMAN	0.170	0.00	0.00	0.00	-2.87	-8.15	0.27 QAR	0.52	7.10
OMINVEST	0.338	0.00	-1.74	-1.74	-0.59	2.42	0.27 QAR	0.88	8.54

Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
29-Jul-20	16.46%	11.41%	0.08%	0.36%	0.33%	3.57%	3.36%	7.58%	3.38%	2.91%
5-Aug-20	16.51%	11.46%	0.08%	0.36%	0.33%	3.57%	3.36%	7.58%	3.41%	2.92%

End of Report

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Leading Sector Performance

Kuwait

The market are up today by + 1.03 % The leading sector best performance indices today are Banking 1.44 % Industrials 0.77 % Telecom 0.63 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 22.63 % while the bottom sector performance is Consumer services by -31.3 %

Telecommunication sector are up today by + 0.63 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 11.43 %.

KSA

Saudi Armco are have negative performance today by -0.45 %, SABIC have positive performance today by + 0.34 %

STC are have positive performance today by + 0.21 %, Al Rajhi Bank have positive performance today by + 0.97 %

UAE

ETISALAT AD are down today by -0.12% , still outperform the market performance and act defensively with COVID19



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