

Daily Markets Wrap,

NIC Research and Studies Dep - July 06, 2020

Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,145.35	0.06	0.42	0.29	0.29	-18.10	29.77 KWD	1.53	15.35
Kuwait Permier Index	5,627.36	0.05	0.50	0.36	0.36	-19.33	21.66 KWD	1.62	15.41
Kuwait Main Index	4,193.32	0.07	0.21	0.08	0.08	-14.61	8.11 KWD	1.27	15.21
Kuwait Sector									
Banking	1,164.58	0.02	0.34	0.38	0.38	-21.45	17.26 KWD	1.57	15.85
Telecom	1,046.80	0.47	0.88	1.02	1.02	-6.26	3.19 KWD	1.74	11.05
Industrials	802.16	0.31	0.66	0.74	0.74	-13.51	2.85 KWD	1.37	16.81
Financial services	852.20	-0.40	-0.24	-1.81	-1.81	-21.20	2.20 KWD	0.85	11.97
Real estate	894.01	-0.13	0.52	0.08	0.08	-15.55	1.92 KWD	0.97	13.10
Basic materials	813.60	-0.13	0.39	-0.48	-0.48	-10.41	0.73 KWD	1.19	18.24
Health care	839.19	0.00	2.21	2.21	2.21	-5.13	0.42 KWD	6.38	47.95
Consumer services	773.93	0.38	0.63	-0.49	-0.49	-27.82	0.40 KWD	1.55	8.91
Insurance	961.31	0.83	0.51	0.62	0.62	0.78	0.35 KWD	0.81	8.25
Consumer goods	733.91	-0.65	-0.51	-0.33	-0.33	15.18	0.23 KWD	1.57	32.09
Oil and Gas	1,087.86	0.04	-0.26	-0.31	-0.31	-12.14	0.23 KWD	1.58	8.96
Technology	494.70	0.00	0.00	0.00	0.00	-3.95	0.01 KWD	0.53	0.00

What Move the GCC markets , Oil Prices

Oil prices rose on Monday, supported by tighter supplies and a string of data expected to show economic recovery across the globe and despite a spike in coronavirus cases in the United States and other countries.

Oil up on tighter supply, expectations for positive data

Brent crude was up 73 cents, or 1.7%, to \$43.53 per barrel

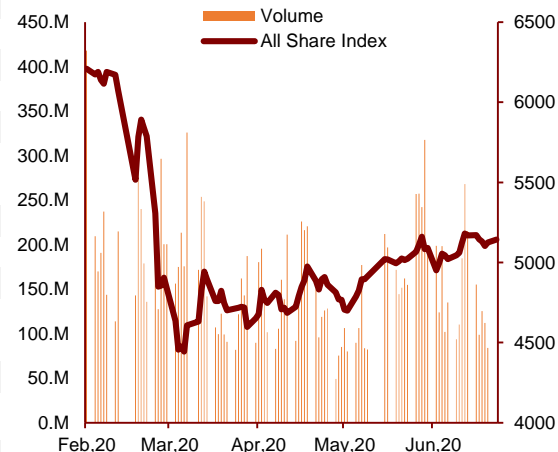
Kuwait Market

The market are closed today flat today by +0.06%, after the banking sector disclosure of the defer installments loss and affected by the two forces of hope in gradual re-opening the local economy and Worries about a second wave of Covid-19 cases in all over the globe and surging coronavirus infections. *Value traded over 20.5 Million KD.*

Saudi Market

The Market closed flat today by +0.03% ,the performance are linked by re-opining the local economy indicating an economic recovery.

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	7,390.59	0.03	1.07	2.30	2.30	-11.90	8,333 SAR	5.31	29.20
Qatar (QE Index)	9,196.47	0.10	-0.01	2.36	2.36	-11.65	487 QAR	1.65	30.91
Dubai (DFMGI)	2,087.38	1.23	1.26	1.07	1.07	-24.50	222 AED	0.95	8.03
Abu Dhabi (ADI)	4,318.45	0.34	0.16	0.76	0.76	-14.92	487 AED	4.00	21.38
Bahrain (BAX)	1,277.16	-0.03	0.22	-0.03	-0.03	-20.68	13 BHD	0.94	16.42
MUSCAT SE INDEX	3,511.21	0.08	-0.02	-0.14	-0.14	-11.80	4 OMR	0.74	9.30
Developed Markets									
MSCI World Index	2,226.39	-0.06	0.00	1.12	1.12	-5.60			
U.S. (S&P 500)	3,130.01	0.45	4.02	0.96	0.96	-3.12			
U.K. (FTSE 100)	6,266.35	1.77	1.74	1.57	1.57	-16.92			
Japan (Topix)	1,577.15	1.60	1.60	1.18	1.18	-8.38			
Emerging Markets									
MSCI EM Index	1,033.09	0.94	0.00	3.82	3.82	-7.32			
China (SSE Composite)	3,332.88	5.71	5.80	11.76	11.76	9.36			
India (Sensex)	36,487.28	1.29	1.39	4.60	4.60	-11.47			



Notes

PBV is calculated by the last closing price divided by the latest fiscal period total equity per share and PBV for the index its calculated on the weighted average scaled by market cap , also PE are market cap weighted average.

Sources : Reuters , NIC

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.823	0.00	0.00	0.24	0.24	-19.24	5.64 KWD	1.44	14.43
KFH	0.611	0.00	0.33	-0.16	-0.16	-17.13	4.69 KWD	2.05	18.79
Zain	0.563	0.36	0.90	1.44	1.44	-6.17	2.43 KWD	1.87	11.19
BOUBYAN BANK	0.538	0.37	1.13	1.13	1.13	-11.87	1.62 KWD	2.49	27.26
Agility	0.740	0.27	0.68	0.82	0.82	-9.54	1.30 KWD	1.12	14.60
Saudi Arabia									
ARAMCO	32.95	0.46	0.15	1.38	1.38	-6.52	6,561.05 SAR	6.13	21.15
SABIC	89.00	-0.34	-0.22	1.02	1.02	-5.22	267.94 SAR	1.60	221.84
STC	98.70	-0.30	0.20	-0.30	-0.30	-3.05	198.03 SAR	3.15	18.19
AL-RAJHI BANK	58.00	0.00	0.87	2.47	2.47	-11.31	145.02 SAR	2.92	14.46
NCB	37.20	-0.13	0.00	-0.13	-0.13	-24.47	111.77 SAR	1.74	9.71
United Arab Emirates									
ETISALAT.AD	16.64	0.48	-1.67	0.00	0.00	0.86	144.02 AED	3.19	16.63
FAB.AD	11.20	-0.18	0.00	-0.36	-0.36	-26.12	122.52 AED	1.31	10.85
EMIRATES NBD	8.86	0.57	-0.45	0.00	0.00	-31.85	55.65 AED	0.70	3.84
DB ISLAMIC BK	3.91	1.30	0.77	2.36	2.36	-29.04	27.95 AED	0.79	5.94
EMAAR PROPERT	2.75	2.23	2.61	0.73	0.73	-31.59	19.26 AED	0.36	3.11
Qatar									
QNB	17.61	-0.96	-1.61	1.61	1.61	-14.18	164.21 QAR	1.87	11.64
INDUSTRIES QAT	8.07	0.51	0.89	4.87	4.87	-21.49	48.58 QAR	1.52	23.09
QA ISLAMIC BK	15.87	-0.19	-0.81	0.76	0.76	3.52	37.57 QAR	1.85	13.17
MASRAF AL RAYA	3.95	0.13	-1.25	3.40	3.40	-0.25	29.58 QAR	2.32	13.57
MESAIEED PETRO	2.08	-0.67	0.05	3.96	3.96	-16.33	26.32 QAR	1.82	27.21
OMAN									
BANK MUSCAT	0.334	0.00	-1.18	-0.60	-0.60	-19.19	1.09 OMR	0.57	6.35
OMANTEL	0.636	0.00	0.00	-0.62	-0.62	3.25	0.48 OMR	0.84	6.14
BANK DHOFAR	0.105	0.00	0.00	0.00	0.00	-14.63	0.31 QAR	0.46	19.81
NAT BANK OF OMAN	0.170	-2.30	0.00	-2.30	-2.30	-7.61	0.28 QAR	0.54	6.80
OMINVEST	0.344	0.00	-1.15	1.18	1.18	4.24	0.28 QAR	0.89	8.69

Leading Sector Performance

Kuwait

The market are up by +0.06% today. The leading sector positive performance indices today insurance , Telecom, and consumer Services sector by +0.83% , +0.47 % and 0.38% respectively.

Telecommunication sector are down today by +0.47% and act defensively in Covid 19 and outperform Kuwait market index in YTD perspective by +11.84%.

Consumer goods are the best performance sector have YTD positive performance by +15.18%, the performance are linked to COVID 19 effect.

KFH has a positive price return performance spread over NBK in YTD perspective by +2.11%.

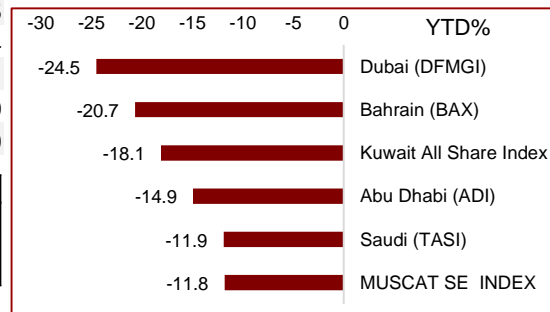
KSA

Saudi Aramco in positive performance today +0.46% and SABIC have negative performance today by -0.34% compared to yesterday close .

STC also have negative performance today by -0.30% and still less affected by the COVID 19 Crises as telecommunication sectors are outperform,

UAE

ETISALAT.AD are up by +0.48% today also less affected by the COVID 19 Crises as telecommunication sectors are outperform and act defensively on this crises.



Summary - Absolute change in Foreign Ownership

	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
24-Jun-20	16.45%	11.83%	0.09%	0.37%	0.35%	3.56%	3.37%	7.42%	3.27%	2.90%
1-Jul-20	16.57%	11.82%	0.09%	0.37%	0.35%	3.55%	3.39%	7.51%	3.33%	2.90%

End of Report

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