

# Daily Markets Wrap,

## NIC Research and Studies Dep - June 23, 2020

### Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>		%	%	%	%	%			
Kuwait All Share Index	5,121.16	1.18	2.01	2.51	6.19	-18.48	29.66 KWD	1.51	14.97
Kuwait Permier Index	5,588.18	1.49	2.66	3.02	7.49	-19.89	21.54 KWD	1.60	14.96
Kuwait Main Index	4,199.25	0.34	0.31	1.18	2.84	-14.49	8.12 KWD	1.27	15.01
<b>Kuwait Sector</b>									
Banking	1,156.82	1.57	2.63	1.57	4.42	-21.98	17.16 KWD	1.55	15.35
Telecom	1,055.05	0.84	1.60	6.16	9.20	-5.52	3.23 KWD	1.76	11.10
Industrials	780.35	1.20	2.53	5.61	14.68	-15.87	2.78 KWD	1.29	15.72
Financial services	874.83	0.81	0.97	-1.36	3.77	-19.11	2.25 KWD	0.86	12.31
Real estate	879.88	0.07	0.01	3.83	5.17	-16.89	1.89 KWD	0.95	13.28
Basic materials	807.21	0.13	0.89	7.78	26.87	-11.11	0.72 KWD	1.17	17.78
Health care	828.60	0.00	-0.90	-1.44	-2.67	-6.33	0.41 KWD	6.42	47.23
Consumer services	778.17	0.19	0.73	5.93	7.58	-27.43	0.40 KWD	1.60	9.03
Insurance	970.59	0.26	-0.60	1.94	1.22	1.75	0.36 KWD	0.82	8.37
Consumer goods	745.24	-1.01	-0.45	2.60	19.31	16.96	0.23 KWD	1.59	32.71
Oil and Gas	1,082.62	0.15	0.62	4.73	-1.33	-12.56	0.23 KWD	1.56	9.34
Technology	496.88	0.00	0.00	4.27	11.97	-3.53	0.01 KWD	0.54	0.00

### What Move the GCC markets , Oil Prices

Oil prices rose on Tuesday after a volatile session sparked by confusion over the status of the U.S.-China trade deal, also supported by tighter supplies from major producers

Also Oil prices have been supported by a recovery in fuel demand globally as nations resume economic activity after easing lockdowns.

*Brent crude rose 80 cents, or 1.86%, to \$43.88 a barrel*

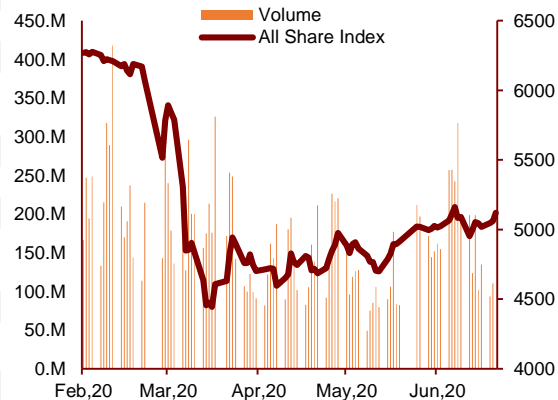
### Kuwait Market

The market are closed today in positive territory by +1.18%, with more re-opening of the local economy. Also the optimism of Oil price performance , Oil prices have been supported by a recovery in fuel demand globally . *Value traded over 43.4 Million KD.*

### Saudi Market

The Market closed flat today by +0.07% ,the performance are linked by lifting virus containment measures and oil positive price performance .

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>		%	%	%	%	%			
Saudi (TASI)	7,265.08	0.07	-1.23	0.72	11.68	-13.40	8,305 SAR	5.30	29.49
Qatar (QE Index)	9,261.29	0.01	-0.63	4.71	12.84	-11.17	483 QAR	1.67	23.09
Dubai (DFMGI)	2,120.66	1.42	2.03	9.03	19.72	-23.30	227 AED	0.97	7.96
Abu Dhabi (ADI)	4,319.53	-0.63	-0.59	4.30	15.66	-14.90	489 AED	4.01	23.24
Bahrain (BAX)	1,280.33	0.14	0.47	0.84	-5.20	-20.49	13 BHD	0.94	16.40
MUSCAT SE INDEX	3,524.60	0.42	0.25	-0.56	2.21	-11.47	4 OMR	0.74	9.93
<b>Developed Markets</b>									
MSCI World Index	2,217.82	0.40	0.40	3.26	19.71	-5.96			
U.S. (S&P 500)	3,117.86	0.00	0.65	2.42	20.63	-3.50			
U.K. (FTSE 100)	6,325.87	1.30	0.53	4.10	11.53	-16.13			
Japan (Topix)	1,587.14	0.51	0.27	1.50	13.12	-7.80			
<b>Emerging Markets</b>									
MSCI EM Index	1,000.19	-0.12	-0.12	7.51	17.87	-10.27			
China (SSE Composite)	2,970.62	0.18	0.10	4.15	8.01	-2.61			
India (Sensex)	35,430.43	1.49	2.12	9.38	20.35	-14.03			



### 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
		%	%	%	%	%			
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	0.816	1.87	3.55	5.84	13.33	-19.93	5.59 KWD	1.43	14.05
KFH	0.608	1.50	1.84	-1.30	5.82	-17.53	4.67 KWD	2.04	18.42
Zain	0.569	1.25	1.79	7.36	10.27	-5.17	2.46 KWD	1.90	11.21
BOUBYAN BANK	0.507	2.01	4.11	-0.20	4.18	-16.95	1.54 KWD	2.36	25.27
Agility	0.705	1.88	3.68	6.82	23.90	-13.81	1.24 KWD	1.07	13.69
<b>Saudi Arabia</b>									
ARAMCO	32.90	0.30	-0.60	-0.30	9.12	-6.67	6,561.75 SAR	6.13	21.15
SABIC	89.00	-0.56	-2.41	3.73	27.14	-5.22	268.57 SAR	1.61	227.80
STC	98.70	0.00	-0.30	-0.80	12.80	-3.05	197.45 SAR	3.14	18.34
AL-RAJHI BANK	58.60	-0.17	-0.51	1.56	8.92	-10.40	146.79 SAR	2.96	14.79
NCB	37.25	-0.40	-0.93	-6.87	7.35	-24.37	112.23 SAR	1.75	9.83
<b>United Arab Emirates</b>									
ETISALAT.AD	16.84	-0.12	0.00	7.12	20.11	2.93	146.45 AED	3.25	16.93
FAB.AD	11.26	-1.40	-1.23	1.08	16.68	-25.73	122.96 AED	1.31	11.05
EMIRATES NBD	9.10	1.11	-1.09	6.31	25.86	-30.00	57.48 AED	0.73	3.92
DB ISLAMIC BK	3.95	0.25	-0.50	13.18	9.72	-28.31	28.60 AED	0.80	6.06
EMAAR PROPERT	2.84	1.79	4.41	13.15	27.93	-29.35	20.33 AED	0.38	3.22
<b>Qatar</b>									
QNB	18.30	1.72	2.23	6.71	8.93	-11.12	169.03 QAR	1.93	11.78
INDUSTRIES QAT	8.21	-1.52	-1.69	6.00	24.33	-19.57	49.64 QAR	1.55	23.96
QA ISLAMIC BK	16.11	0.06	-2.01	5.84	12.26	5.15	38.07 QAR	1.88	13.34
MASRAF AL RAYA	3.89	0.31	-0.49	0.31	6.34	-1.72	29.19 QAR	2.29	13.34
MESAEED PETRO	2.14	0.66	0.00	6.42	46.51	-14.78	26.87 QAR	1.86	27.60
<b>OMAN</b>									
BANK MUSCAT	0.340	0.59	2.41	-1.73	6.25	-17.74	1.10 OMR	0.58	6.43
OMANTEL	0.648	0.62	0.00	1.25	10.58	5.19	0.49 OMR	0.86	6.22
BANK DHOFAR	0.105	0.00	-0.94	0.96	16.67	-14.63	0.31 QAR	0.46	19.81
NAT BANK OF OMAN	0.167	1.21	1.21	7.74	4.38	-9.24	0.27 QAR	0.51	6.45
OMINVEST	0.350	0.00	0.00	2.94	9.38	6.06	0.28 QAR	0.91	8.84

### Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
10-Jun-20	16.38%	11.69%	0.09%	0.37%	0.35%	3.76%	3.35%	7.36%	3.31%	2.90%
17-Jun-20	16.46%	11.76%	0.09%	0.37%	0.34%	3.72%	3.34%	7.41%	3.28%	2.90%

### End of Report

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### Leading Sector Performance

#### Kuwait

The market are up by +1.18% this week. The leading sector positive performance indices this week is Banking, industrial ,Telecommunication sector by +1.57%, +1.20% and +0.84% , respectively.

Telecommunication sector are up today by +0.84% and act defensively in Covid 19 and outperform Kuwait market index in YTD perspective by +12.96%,

Consumer goods are the best performance sector have YTD positive performance by +16.96%, the performance are linked to COVID 19 effect.

KFH has a positive price return performance spread over NBK in YTD perspective by +2.39%.

#### KSA

Saudi Aramco in positive performance today +0.30% and SABIC have negative performance by -0.56% compared to yesterday close .

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

#### UAE

ETISALAT.AD are down by -0.12% today also less affected by the COVID 19 Crises as telecommunication sectors are outperform and act defensively on this crises.

