



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

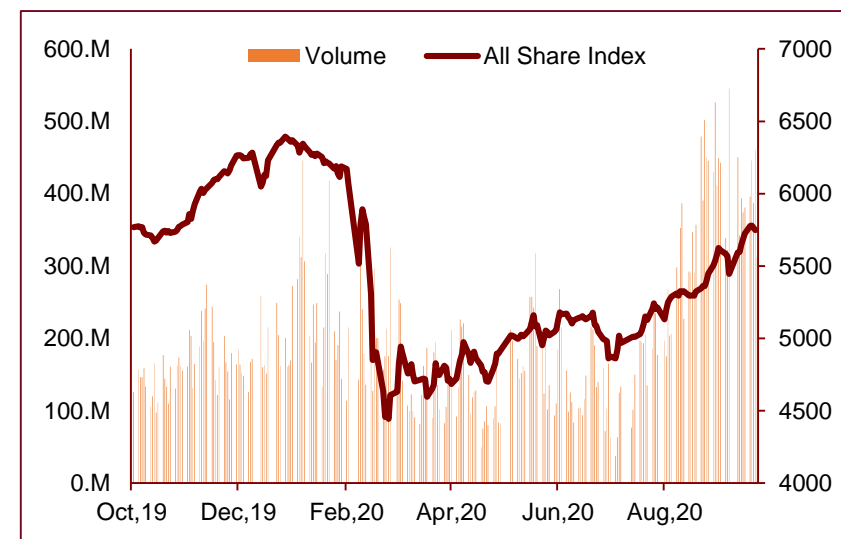
Thursday, October 15, 2020



Market Watch

| Description | Close | Day Δ | WTD | MTD | QTD | YTD | M Cap (in Bn) | PBV | PE |
|------------------------|----------|-------|-------|-------|-------|--------|---------------|------|-------|
| Kuwait | | % | % | % | % | % | | | |
| Kuwait All Share Index | 5,735.23 | -0.22 | 0.18 | 5.33 | 5.33 | -8.71 | 33.27 KWD | 1.94 | 19.30 |
| Kuwait Premier Index | 6,377.45 | -0.33 | 0.07 | 5.92 | 5.92 | -8.58 | 24.66 KWD | 2.07 | 21.30 |
| Kuwait Main Index | 4,457.71 | 0.13 | 0.52 | 3.58 | 3.58 | -9.22 | 8.61 KWD | 1.57 | 13.59 |
| NIC 50 | 7,031.90 | -0.31 | 0.02 | 5.84 | 5.85 | -5.72 | 28.60 KWD | 1.57 | 15.56 |
| Kuwait Sector | | | | | | | | | |
| Banking | 1,343.99 | -0.44 | 0.00 | 5.70 | 5.70 | -9.35 | 19.93 KWD | 2.19 | 20.93 |
| Telecom | 1,117.28 | 0.27 | 0.26 | 6.28 | 6.28 | 0.05 | 3.43 KWD | 2.00 | 13.52 |
| Industrials | 846.82 | 0.20 | -0.18 | 6.15 | 6.15 | -8.70 | 3.02 KWD | 1.40 | 21.56 |
| Financial services | 962.52 | -0.40 | 2.63 | 6.20 | 6.20 | -11.00 | 2.42 KWD | 0.94 | 7.05 |
| Real estate | 964.10 | 0.38 | -1.57 | 2.08 | 2.08 | -8.93 | 2.07 KWD | 1.10 | 20.86 |
| Basic materials | 835.15 | -0.32 | 2.10 | 7.45 | 7.45 | -8.03 | 0.74 KWD | 1.23 | 19.45 |
| Health care | 821.04 | 0.00 | 0.11 | 0.11 | 0.11 | -7.18 | 0.41 KWD | 6.22 | 52.00 |
| Consumer services | 758.99 | 0.18 | 0.71 | 2.46 | 2.46 | -29.22 | 0.39 KWD | 1.86 | 13.98 |
| Insurance | 1,001.58 | -1.02 | -0.14 | -4.44 | -4.44 | 5.00 | 0.37 KWD | 0.87 | 8.09 |
| Consumer goods | 767.35 | -0.09 | 0.49 | 0.11 | 0.11 | 20.43 | 0.24 KWD | 1.57 | 28.17 |
| Oil and Gas | 1,190.64 | 4.18 | 2.83 | 4.73 | 4.73 | -3.84 | 0.25 KWD | 1.79 | 10.44 |
| Technology | 519.44 | -0.56 | -0.83 | 1.42 | 1.42 | 0.85 | 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) | 8,553.79 | -0.45 | 1.68 | 3.07 | 3.07 | 1.96 | 9,206 SAR | 6.00 | 26.68 |
| Qatar (QE Index) | 9,999.46 | -0.27 | -0.33 | 0.09 | 0.09 | -4.09 | 540 QAR | 1.71 | 12.50 |
| Dubai (DFMGI) | 2,194.63 | -1.06 | -0.89 | -3.47 | -3.47 | -20.62 | 237 AED | 1.25 | 10.73 |
| Abu Dhabi (ADI) | 4,554.37 | -0.41 | 0.93 | 0.80 | 0.80 | -10.27 | 682 AED | 4.60 | 15.64 |
| Bahrain (BAX) | 1,477.84 | 0.08 | 1.33 | 3.02 | 3.02 | -8.22 | 16 BHD | 1.83 | 13.49 |
| MUSCAT SE INDEX | 3,593.63 | -0.01 | -0.29 | -0.58 | -0.58 | -9.73 | 4 OMR | 0.75 | 10.88 |
| Developed Markets | | | | | | | | | |
| MSCI World Index | 2,453.61 | -0.43 | 0.24 | 3.65 | 3.65 | 4.03 | | | |
| U.S. (S&P 500) | 3,488.67 | 0.00 | 0.33 | 3.74 | 3.74 | 7.98 | | | |
| U.K. (FTSE 100) | 5,799.95 | -2.28 | -3.60 | -1.13 | -1.13 | -23.10 | | | |
| Japan (Topix) | 1,631.79 | -0.74 | -0.95 | 0.39 | 0.39 | -5.20 | | | |
| Emerging Markets | | | | | | | | | |
| MSCI EM Index | 1,135.56 | -0.08 | 1.16 | 4.95 | 4.95 | 1.87 | | | |
| China (SSE Composite) | 3,332.18 | -0.26 | 1.84 | 3.55 | 3.55 | 9.25 | | | |
| India (Sensex) | 39,728.41 | -2.61 | -1.93 | 4.36 | 4.36 | -3.70 | | | |



What Move the GCC markets ,

Oil Prices

Oil prices fell on Thursday as new restrictions to stem a surge in COVID-19 infections have increased uncertainty over the outlook for economic growth and a recovery in fuel demand. **Brent crude futures dropped \$1.48, or 3.44%, to trade at \$41.83 per barrel**

Kuwait Market

The market are closed today down by -0.22%, Coronavirus concerns continue to weigh on sentiment too as infections surge in the region. Coronavirus restrictions are returning across Europe, with France declaring a state of emergency and London set to see tougher measures. increased uncertainty over the outlook for economic growth.

Saudi Market

The Market closed today down by -0.45% and turn positive YTD performance leading all GCC markets , today market weakness are linked to the slow economic recovery over the globe and re-opening the global economy and oil prices over \$41 a barrel.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



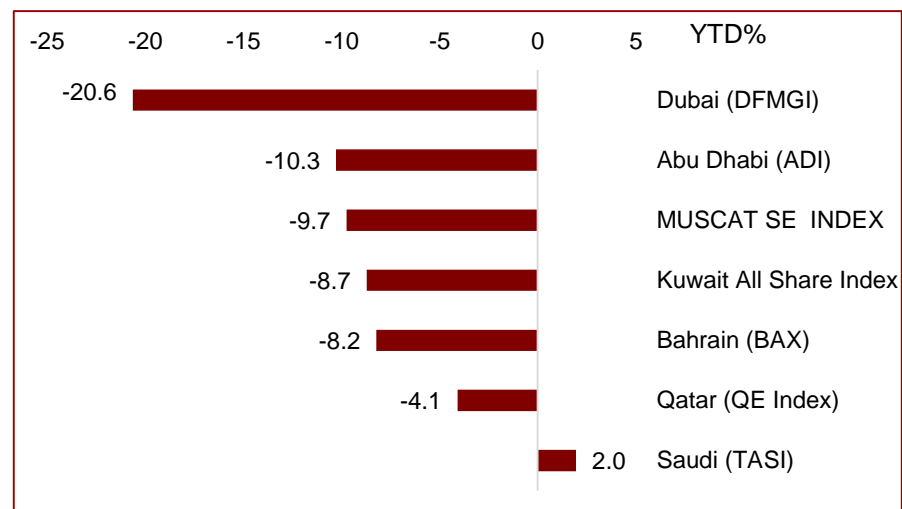
| Description | Close | Day Δ | WTD | MTD | QTD | YTD | M Cap (in Bn) | PBV | PE |
|-----------------------------|--------|-------|-------|-------|-------|--------|---------------|------|-------|
| Blue Chip Watch | | | | | | | | | |
| Kuwait | | | | | | | | | |
| NBK | 0.890 | -0.67 | -1.55 | 2.30 | 2.30 | -12.66 | 6.10 KWD | 1.72 | 21.51 |
| KFH | 0.708 | -0.14 | 0.28 | 7.11 | 7.11 | -3.97 | 5.43 KWD | 2.88 | 27.21 |
| Zain | 0.616 | 0.16 | 0.33 | 7.32 | 7.32 | 2.67 | 2.67 KWD | 2.17 | 13.09 |
| BOUBYAN BANK | 0.637 | -0.16 | 2.91 | 7.06 | 7.06 | 4.34 | 1.93 KWD | 3.38 | 38.43 |
| Agility | 0.695 | 0.00 | -1.42 | 5.78 | 5.78 | -2.29 | 1.41 KWD | 1.20 | 20.88 |
| Saudi Arabia | | | | | | | | | |
| ARAMCO | 35.80 | 0.00 | -0.56 | -0.28 | -0.28 | 1.56 | 7,160.19 SAR | 6.98 | 29.58 |
| SABIC | 96.10 | -1.33 | 4.57 | 8.71 | 8.71 | 2.34 | 292.21 SAR | 1.79 | 0.00 |
| STC | 104.00 | -1.52 | 0.00 | 3.59 | 3.59 | 2.16 | 211.21 SAR | 3.36 | 19.88 |
| AL-RAJHI BANK | 66.90 | -0.89 | 0.75 | 1.83 | 1.83 | 2.29 | 168.75 SAR | 3.25 | 17.35 |
| NCB | 41.60 | -0.95 | 8.05 | 11.98 | 11.98 | -15.53 | 126.00 SAR | 1.72 | 11.76 |
| United Arab Emirates | | | | | | | | | |
| ETISALAT.AD | 16.90 | 0.00 | 0.00 | 1.44 | 1.44 | 3.30 | 146.98 AED | 3.24 | 16.67 |
| FAB.AD | 11.22 | -1.41 | 1.25 | 0.53 | 0.53 | -25.46 | 122.52 AED | 1.25 | 11.86 |
| EMIRATES NBD | 10.05 | -2.90 | -4.29 | -5.63 | -5.63 | -22.69 | 63.48 AED | 0.78 | 5.75 |
| DB ISLAMIC BK | 4.15 | 0.00 | -1.89 | -3.94 | -3.94 | -24.68 | 30.05 AED | 0.82 | 7.26 |
| EMAAR PROPERT | 2.63 | -1.50 | -0.75 | -5.73 | -5.73 | -34.58 | 18.83 AED | 0.34 | 3.75 |
| Qatar | | | | | | | | | |
| QNB | 17.90 | -0.89 | -0.88 | -1.04 | -1.04 | -12.53 | 165.33 QAR | 1.78 | 14.04 |
| INDUSTRIES QAT | 9.84 | -0.61 | -0.32 | 0.59 | 0.59 | -3.62 | 59.53 QAR | 1.84 | 38.08 |
| QA ISLAMIC BK | 16.47 | -0.18 | -2.22 | -1.33 | -1.33 | 6.20 | 38.92 QAR | 1.87 | 13.64 |
| MASRAF AL RAYA | 4.18 | 0.31 | -0.55 | 0.36 | 0.36 | 5.43 | 31.31 QAR | 2.25 | 14.27 |
| MESAIED PETRO | 2.10 | -0.48 | -0.47 | 1.20 | 1.20 | -16.18 | 26.32 QAR | 1.71 | 26.31 |
| OMAN | | | | | | | | | |
| BANK MUSCAT | 0.372 | 0.54 | 1.09 | 3.35 | 3.35 | -10.48 | 1.20 OMR | 0.62 | 7.51 |
| OMANTEL | 0.620 | -0.64 | -1.27 | -1.90 | -1.90 | 0.65 | 0.47 OMR | 0.88 | 6.83 |
| 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 | 0.328 | -1.20 | 1.86 | -0.61 | -0.61 | -0.61 | 0.26 QAR | 1.05 | 6.31 |

Foreign Holdings

| Date | NBK | GBK | CBK | ABK | MUTAHED | KIB | BURG | KFH | BOUB | WARBA |
|-----------|--------|--------|-------|-------|---------|-------|-------|-------|-------|-------|
| 7-Oct-20 | 16.89% | 12.21% | 0.06% | 0.19% | 0.31% | 3.62% | 3.64% | 8.01% | 3.70% | 2.96% |
| 14-Oct-20 | 16.93% | 12.38% | 0.06% | 0.12% | 0.31% | 3.59% | 3.73% | 8.14% | 3.80% | 2.96% |

End of Report

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Leading Sector Performance

The market are down today by -0.22 % The leading sector bottom performance indices today are Insurance -1.02 % Technology -0.56 % Banking -0.44 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 20.43 % while the bottom sector performance is Consumer services by -29.22 %.

Telecommunication sector are up today by + 0.27 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 8.76 %.

KSA

Saudi Armco are flat performance today 0 %, SABIC have negative performance today by -1.33 %

STC are have negative performance today by -1.52 %, Al Rajhi Bank have negative 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



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