

شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

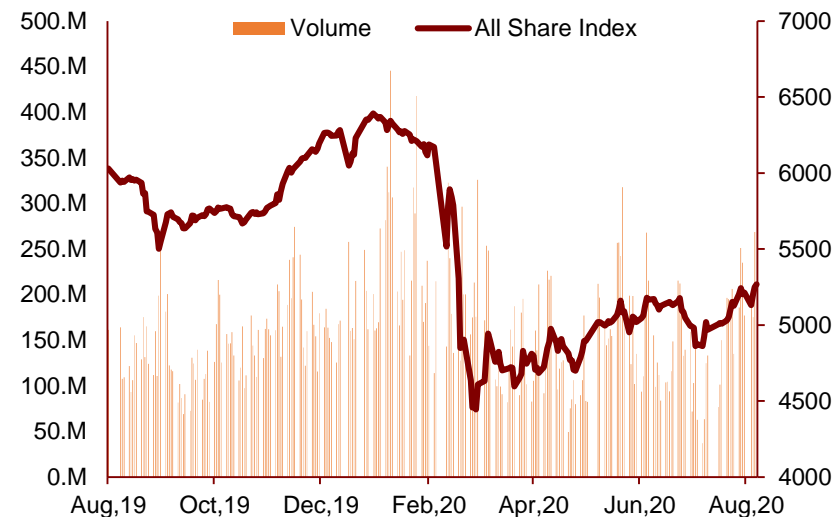
Wednesday, August 26, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	5,268.56	0.38	1.07	6.05	2.69	-16.14	30.43 KWD	1.74	18.13
Kuwait Permier Index	5,828.34	0.38	1.28	7.63	3.95	-16.45	22.42 KWD	1.87	19.35
Kuwait Main Index	4,159.92	0.38	0.47	1.81	-0.72	-15.29	8.01 KWD	1.38	14.73
Kuwait Sector									
Banking	1,223.37	0.45	1.39	8.85	5.45	-17.49	18.04 KWD	1.90	18.86
Telecom	1,070.53	0.07	0.26	5.98	3.31	-4.13	3.28 KWD	1.92	13.03
Industrials	764.13	0.18	0.70	-1.22	-4.03	-17.61	2.73 KWD	1.25	20.00
Financial services	865.14	0.40	1.65	3.45	-0.32	-20.00	2.20 KWD	0.93	9.46
Real estate	878.95	0.72	0.17	3.91	-1.60	-16.98	1.88 KWD	1.01	22.50
Basic materials	787.22	0.42	-0.27	3.25	-3.71	-13.31	0.70 KWD	1.15	18.71
Health care	829.21	0.00	0.00	0.00	1.00	-6.26	0.41 KWD	6.17	52.21
Consumer services	719.27	-0.11	-0.69	-4.76	-7.52	-32.92	0.37 KWD	1.85	12.28
Insurance	959.36	0.00	2.46	2.26	0.42	0.58	0.35 KWD	0.84	7.75
Consumer goods	805.59	1.28	2.41	11.35	9.41	26.43	0.24 KWD	1.65	29.33
Oil and Gas	1,095.03	2.41	-0.16	-0.02	0.35	-11.56	0.22 KWD	1.53	9.98
Technology	458.33	-3.08	3.96	-1.56	-7.35	-11.02	0.01 KWD	0.53	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	7,955.04	0.21	1.43	6.65	10.12	-5.18	8,861 SAR	5.88	26.20
Qatar (QE Index)	9,898.93	-0.10	1.17	5.48	9.81	-5.22	522 QAR	1.71	62.69
Dubai (DFMGI)	2,288.93	-0.68	1.88	11.61	10.83	-17.21	248 AED	31.81	10.86
Abu Dhabi (ADI)	4,529.79	-0.63	0.65	5.23	5.69	-10.76	679 AED	4.38	14.72
Bahrain (BAX)	1,373.11	-0.05	1.31	6.40	7.48	-14.72	15 BHD	1.34	13.41
MUSCAT SE INDEX	3,747.96	0.48	3.28	5.04	6.60	-5.86	4 OMR	0.77	11.18
Developed Markets									
MSCI World Index	2,422.95	0.24	1.29	5.12	10.04	2.73			
U.S. (S&P 500)	3,443.62	0.36	1.37	5.27	11.07	6.59			
U.K. (FTSE 100)	6,023.83	-0.22	0.37	2.14	-2.36	-20.13			
Japan (Topix)	1,624.48	-0.05	1.27	8.58	4.22	-5.63			
Emerging Markets									
MSCI EM Index	1,114.72	0.59	2.10	3.32	12.02	0.01			
China (SSE Composite)	3,329.74	-1.30	-1.51	0.60	11.56	9.17			
India (Sensex)	39,073.92	0.59	1.69	3.93	11.94	-5.26			



What Move the GCC markets ,

Oil Prices

The price of Brent crude oil edged higher on Wednesday, lifted by U.S. producers shutting most of their offshore output in the Gulf of Mexico ahead of Hurricane Laura and optimism over China-U.S. trade talks.

OPEC said in a monthly report that world oil demand will fall by 9.06 million bpd this year, more than the 8.95 million bpd decline expected a month ago. **Brent crude oil futures added 8 cents, or 0.2%, to \$45.94 a barrel**

Kuwait Market

The market are closed today up by +0.38% due to 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 also new companies traded and the expected positive effect to the market liquidity.

Saudi Market

The Market closed up today by +0.21% , 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



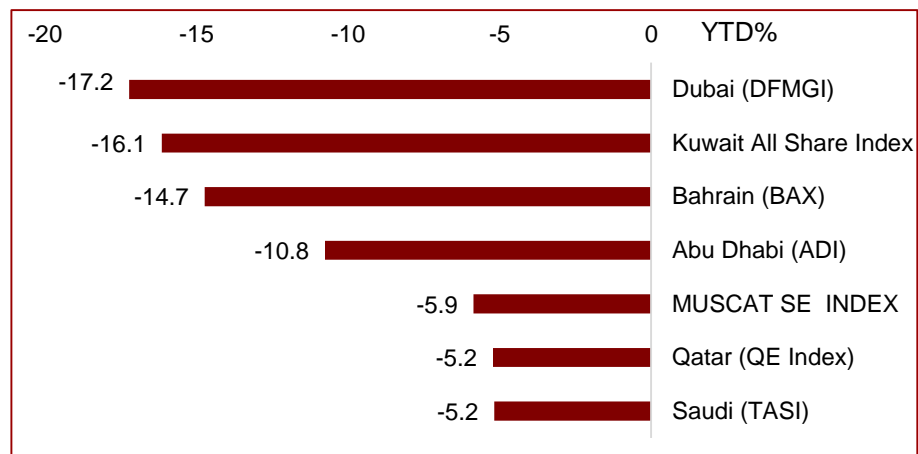
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.857	0.71	3.00	8.62	4.38	-15.90	5.83 KWD	1.64	20.43
KFH	0.624	0.16	1.13	7.96	1.96	-15.36	4.78 KWD	2.54	23.91
Zain	0.590	0.17	0.00	7.27	6.31	-1.67	2.55 KWD	2.08	12.53
BOUBYAN BANK	0.569	0.71	1.07	7.16	6.95	-6.79	1.71 KWD	3.00	34.03
Agility	0.626	0.16	1.46	-2.19	-1.92	-11.99	1.27 KWD	1.08	18.77
Saudi Arabia									
ARAMCO	34.90	-0.14	2.20	5.76	7.38	-0.99	6,990.37 SAR	6.81	28.76
SABIC	88.50	0.11	0.11	-0.45	0.45	-5.75	265.21 SAR	1.62	0.00
STC	96.50	0.00	-0.10	-0.72	-2.53	-5.21	193.01 SAR	3.07	18.07
AL-RAJHI BANK	66.00	0.00	1.69	12.05	16.61	0.92	165.01 SAR	3.18	16.79
NCB	38.10	0.00	-1.30	4.96	2.28	-22.64	114.31 SAR	1.56	10.86
United Arab Emirates									
ETISALAT.AD	16.86	0.36	-1.30	0.48	1.33	2.20	146.11 AED	3.22	16.57
FAB.AD	11.36	-1.22	-0.70	3.66	0.71	-25.33	125.58 AED	1.29	11.99
EMIRATES NBD	11.35	1.34	6.57	28.39	28.10	-12.69	70.75 AED	0.87	6.22
DB ISLAMIC BK	4.12	-1.90	1.48	9.28	7.85	-25.23	30.41 AED	0.83	7.35
EMAAR PROPERT	2.98	-1.65	2.41	15.95	9.16	-25.87	21.69 AED	0.39	4.26
Qatar									
QNB	18.33	0.16	-1.14	1.61	5.18	-11.17	169.03 QAR	1.86	13.13
INDUSTRIES QAT	10.00	-0.89	10.58	27.28	29.33	-3.18	61.04 QAR	1.89	38.15
QA ISLAMIC BK	16.18	-0.06	-0.25	0.06	2.29	5.09	38.26 QAR	1.84	13.42
MASRAF AL RAYA	4.16	1.02	0.29	5.69	8.95	5.10	30.91 QAR	2.32	14.15
MESAEED PETRO	2.13	0.47	-0.05	1.82	5.10	-15.42	26.68 QAR	1.73	26.13
OMAN									
BANK MUSCAT	0.398	0.50	4.15	14.86	19.64	-2.74	1.30 OMR	0.67	8.16
OMANTEL	0.616	0.65	0.65	1.32	-3.75	0.00	0.46 OMR	0.87	6.70
BANK DHOFAR	0.110	0.00	-1.79	10.00	4.76	-10.57	0.33 QAR	0.48	21.57
NAT BANK OF OMAN	0.180	0.00	0.56	6.51	3.45	-2.17	0.29 QAR	0.55	7.56
OMINVEST	0.336	-1.18	-1.18	-2.91	-1.76	1.21	0.27 QAR	1.09	6.43

Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
12-Aug-20	16.54%	11.44%	0.07%	0.35%	0.33%	3.57%	3.35%	7.52%	3.45%	2.92%
19-Aug-20	16.56%	11.38%	0.07%	0.34%	0.33%	3.58%	3.34%	7.52%	3.43%	2.92%

End of Report

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Leading Sector Performance

Kuwait

The market are up today by +0.38 % The leading sector best performance indices today are Oil and Gas 2.41 % Consumer goods 1.28 % Real estate 0.72 % respectively

from YTD performance perspective the best sector performance are Consumer goods by 26.43 % while the bottom sector performance is Consumer services by -32.92 %

Telecommunication sector are up today by +0.07 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by +12.01 %

KSA

Saudi Armco are have negative performance today by -0.14 %, SABIC have positive performance today by +0.11 %

STC are flat performance today 0 %, Al Rajhi Bank flat performance today 0 %

UAE

ETISALAT AD are down today by +0.36% , still outperform the market performance and act defensively with COVID19



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