

# Daily Markets Wrap,

## NIC Research and Studies Dep - July 02, 2020

### Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>		%	%	%	%	%			
Kuwait All Share Index	5,123.80	0.42	-0.85	-0.13	-0.13	-18.44	29.55 KWD	1.51	15.15
Kuwait Permier Index	5,599.43	0.59	-1.01	-0.14	-0.14	-19.73	21.45 KWD	1.61	15.27
Kuwait Main Index	4,184.57	-0.04	-0.41	-0.13	-0.13	-14.79	8.10 KWD	1.27	14.81
<b>Kuwait Sector</b>									
Banking	1,160.60	0.59	-0.74	0.04	0.04	-21.72	17.11 KWD	1.56	15.71
Telecom	1,037.68	0.71	-0.97	0.14	0.14	-7.08	3.16 KWD	1.72	10.93
Industrials	796.92	0.85	-0.72	0.08	0.08	-14.08	2.82 KWD	1.34	15.91
Financial services	854.26	-0.53	-1.91	-1.57	-1.57	-21.01	2.20 KWD	0.85	12.09
Real estate	889.38	-0.60	-0.48	-0.43	-0.43	-15.99	1.92 KWD	0.96	12.97
Basic materials	810.42	0.08	-0.57	-0.87	-0.87	-10.76	0.72 KWD	1.19	18.11
Health care	821.04	0.00	-0.91	0.00	0.00	-7.18	0.41 KWD	6.45	46.75
Consumer services	769.09	0.03	-1.85	-1.11	-1.11	-28.27	0.40 KWD	1.52	8.85
Insurance	956.43	0.00	-1.66	0.11	0.11	0.27	0.35 KWD	0.81	8.27
Consumer goods	737.64	0.36	-0.40	0.18	0.18	15.77	0.23 KWD	1.57	31.93
Oil and Gas	1,090.67	-0.25	0.37	-0.05	-0.05	-11.91	0.23 KWD	1.57	8.91
Technology	494.70	0.00	-0.44	0.00	0.00	-3.95	0.01 KWD	0.53	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>		%	%	%	%	%			
Saudi (TASI)	7,312.24	0.81	1.10	1.22	1.22	-12.84	8,277 SAR	5.29	28.77
Qatar (QE Index)	9,211.89	1.37	0.29	2.06	2.06	-11.91	480 QAR	1.63	26.71
Dubai (DFMGI)	2,061.49	-0.14	-1.20	-0.18	-0.18	-25.44	222 AED	0.95	8.03
Abu Dhabi (ADI)	4,311.72	0.62	0.61	0.60	0.60	-15.05	485 AED	4.01	22.71
Bahrain (BAX)	1,274.36	0.17	-0.39	-0.25	-0.25	-20.86	13 BHD	0.93	16.42
MUSCAT SE INDEX	3,511.77	-0.18	-0.40	-0.12	-0.12	-11.79	4 OMR	0.74	9.37
<b>Developed Markets</b>									
MSCI World Index	2,211.27	0.43	2.51	0.43	0.43	-6.24			
U.S. (S&P 500)	3,115.86	0.50	3.55	0.50	0.50	-3.56			
U.K. (FTSE 100)	6,209.41	0.84	0.81	0.64	0.64	-17.67			
Japan (Topix)	1,542.76	0.27	-2.19	-1.03	-1.03	-10.38			
<b>Emerging Markets</b>									
MSCI EM Index	1,001.08	0.60	0.22	0.60	0.60	-10.19			
China (SSE Composite)	3,090.57	2.13	3.73	3.55	3.55	1.33			
India (Sensex)	35,843.70	1.21	1.91	2.66	2.66	-13.11			

### What Move the GCC markets , Oil Prices

Oil prices rose on Thursday as a sharp drop in oil stockpiles outweighed concerns that a spike in U.S. coronavirus infections and revived lockdown measures in California could stall a recovery in fuel demand.

U.S. crude inventories fell 7.2 million barrels from a record high last week

*Brent crude futures were up 21 cents or 0.5% at \$42.24 a barrel, after rising 1.8% in the previous session*

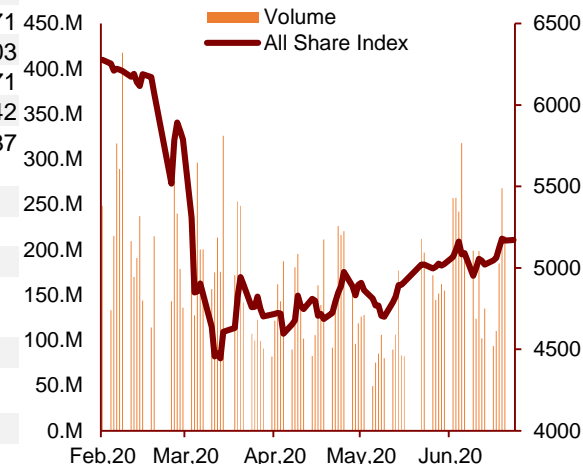
### Kuwait Market

The market are closed today up today by +0.42%, 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 17.1 Million KD.*

### Saudi Market

The Market closed in positive territory today by +0.81% ,the performance are linked by re-opining the local economy indicating an economic recovery.



### 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		%	%	%	%	%			
<b>Kuwait</b>									
NBK	0.823	0.86	-0.48	0.24	0.24	-19.24	5.59 KWD	1.43	14.31
KFH	0.609	0.50	-1.46	-0.49	-0.49	-17.40	4.65 KWD	2.03	18.64
Zain	0.558	0.90	-1.06	0.54	0.54	-7.00	2.39 KWD	1.84	11.03
BOUBYAN BANK	0.532	0.19	-0.19	0.00	0.00	-12.85	1.61 KWD	2.47	27.00
Agility	0.735	0.96	-0.94	0.14	0.14	-10.15	1.28 KWD	1.10	14.40
<b>Saudi Arabia</b>									
ARAMCO	32.90	0.61	0.61	1.23	1.23	-6.67	6,538.95 SAR	6.11	20.89
SABIC	89.20	1.25	1.71	1.25	1.25	-5.01	264.26 SAR	1.58	219.10
STC	98.50	0.10	-0.40	-0.51	-0.51	-3.24	196.77 SAR	3.13	18.29
AL-RAJHI BANK	57.50	0.70	-0.52	1.59	1.59	-12.08	142.73 SAR	2.88	14.23
NCB	37.20	0.27	-0.13	-0.13	-0.13	-24.47	111.28 SAR	1.73	9.73
<b>United Arab Emirates</b>									
ETISALAT.AD	16.78	0.96	-0.48	1.21	1.21	2.08	144.54 AED	3.20	16.69
FAB.AD	11.20	0.54	1.45	-0.36	-0.36	-26.12	121.65 AED	1.30	10.78
EMIRATES NBD	8.90	0.00	0.00	0.45	0.45	-31.54	56.22 AED	0.71	3.88
DB ISLAMIC BK	3.88	1.31	0.00	1.57	1.57	-29.58	27.73 AED	0.78	5.89
EMAAR PROPERT	2.68	-1.47	-3.60	-1.83	-1.83	-33.33	19.47 AED	0.36	3.14
<b>Qatar</b>									
QNB	17.96	2.57	-0.22	3.28	3.28	-12.77	162.99 QAR	1.84	11.47
INDUSTRIES QAT	8.00	4.58	-1.68	2.72	2.72	-23.10	46.64 QAR	1.45	22.00
QA ISLAMIC BK	16.00	1.27	-0.74	1.59	1.59	4.37	37.62 QAR	1.84	13.09
MASRAF AL RAYA	4.00	-0.25	3.09	4.71	4.71	1.01	30.31 QAR	2.36	13.79
MESAIEED PETRO	2.10	3.91	-1.14	2.77	2.77	-17.29	25.57 QAR	1.76	26.23
<b>OMAN</b>									
BANK MUSCAT	0.338	-0.59	-1.17	0.60	0.60	-18.23	1.10 OMR	0.58	6.46
OMANTEL	0.636	0.00	-1.85	-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	0.174	0.00	2.35	0.00	0.00	-5.43	0.28 QAR	0.54	6.80
OMINVEST	0.348	0.00	-1.71	1.18	1.18	4.24	0.28 QAR	0.89	8.69

## Leading Sector Performance

### Kuwait

The market are up by +0.42% today. The leading sector positive performance indices today is industrial , Telecom, Banking sector by +0.85% , +0.71 % and 0.59% respectively.

Telecommunication sector are down today by +0.71% and act defensively in Covid 19 and outperform Kuwait market index in YTD perspective by +11.37%.

Consumer goods are the best performance sector have YTD positive performance by +15.77%, the performance are linked to COVID 19 effect.

KFH has a positive price return performance spread over NBK in YTD perspective by +1.84%.

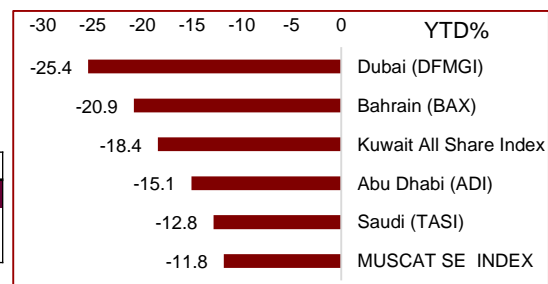
### KSA

*Saudi Aramco in positive performance today +0.61% and SABIC have positive performance today by 1.25% compared to yesterday close .*

STC also have negative performance today by +0.10% and still less affected by the COVID 19 Crises as telecommunication sectors are outperform,

### UAE

ETISALAT.AD are up by +0.96% 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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