



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



## GCC DAILY MARKET WRAP

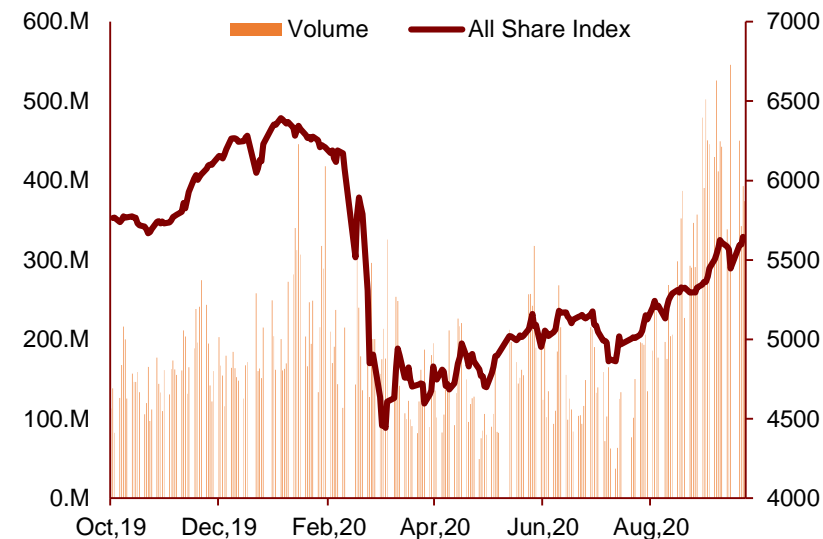
Wednesday, October 7, 2020



### Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>		%	%	%	%	%			
Kuwait All Share Index	5,689.49	0.78	4.57	4.57	4.57	-9.36	32.73 KWD	1.89	19.03
Kuwait Permier Index	6,325.17	0.85	5.20	5.20	5.20	-9.21	24.21 KWD	2.03	20.93
Kuwait Main Index	4,425.10	0.57	2.75	2.75	2.75	-9.95	8.52 KWD	1.49	13.60
NIC 50	6,986.90	0.83	5.15	5.15	5.15	-9.26	28.41 KWD	1.56	15.46
<b>Kuwait Sector</b>									
Banking	1,334.09	0.79	4.92	4.92	4.92	-10.02	19.60 KWD	2.12	20.47
Telecom	1,103.21	1.59	4.94	4.94	4.94	-1.21	3.33 KWD	1.94	13.18
Industrials	842.90	1.19	5.65	5.65	5.65	-9.12	2.98 KWD	1.35	21.47
Financial services	935.93	0.47	3.27	3.27	3.27	-13.46	2.34 KWD	0.92	6.90
Real estate	979.52	0.13	3.71	3.71	3.71	-7.48	2.10 KWD	1.14	21.43
Basic materials	813.46	1.00	4.66	4.66	4.66	-10.42	0.72 KWD	1.23	19.21
Health care	820.13	0.00	0.00	0.00	0.00	-7.28	0.41 KWD	6.22	51.97
Consumer services	753.45	-0.13	1.72	1.72	1.72	-29.73	0.39 KWD	1.91	13.52
Insurance	1,004.73	-0.85	-4.14	-4.14	-4.14	5.33	0.37 KWD	0.89	8.09
Consumer goods	769.44	-0.59	0.38	0.38	0.38	20.76	0.24 KWD	1.59	28.47
Oil and Gas	1,157.11	-0.68	1.78	1.78	1.78	-6.55	0.24 KWD	1.68	10.40
Technology	509.25	-3.45	-0.57	-0.57	-0.57	-1.13	0.01 KWD	0.59	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>		%	%	%	%	%			
Saudi (TASI)	8,358.79	-0.13	0.77	0.72	0.72	-0.36	9,140 SAR	6.03	26.64
Qatar (QE Index)	9,932.43	-0.84	-0.20	-0.04	-0.04	-4.22	539 QAR	1.73	109.60
Dubai (DFMGI)	2,212.73	-0.57	-2.34	-2.67	-2.67	-19.97	241 AED	20.51	10.61
Abu Dhabi (ADI)	4,494.53	0.26	0.06	-0.52	-0.52	-11.45	673 AED	4.62	15.48
Bahrain (BAX)	1,449.38	0.28	1.18	1.04	1.04	-9.99	16 BHD	1.66	13.23
MUSCAT SE INDEX	3,608.12	0.14	-0.18	-0.18	-0.18	-9.37	4 OMR	0.75	10.86
<b>Developed Markets</b>									
MSCI World Index	2,382.57	-0.87	0.85	0.65	0.65	1.02			
U.S. (S&P 500)	3,360.95	0.00	0.37	-0.06	-0.06	4.03			
U.K. (FTSE 100)	5,952.61	0.04	0.86	1.47	1.47	-21.08			
Japan (Topix)	1,646.47	0.04	2.31	1.29	1.29	-4.35			
<b>Emerging Markets</b>									
MSCI EM Index	1,102.47	1.02	1.92	1.89	1.89	-1.09			
China (SSE Composite)	3,218.05	-0.20	-0.04	-5.23	7.82	5.51			
India (Sensex)	39,878.95	0.77	3.17	4.88	4.88	-3.22			



### What Move the GCC markets ,

#### Oil Prices

Oil prices fell on Wednesday after U.S. President Donald Trump dashed hopes for a fourth stimulus package to boost the coronavirus-hit economy and on a larger-than-expected build-up in U.S. crude stocks.

The International Energy Agency (IEA) on Tuesday trimmed its 2020 outlook by 200,000 barrels per day (bpd) to 91.7 million bpd, citing caution about the pace of economic recovery. **Brent crude futures fell 70 cents, or 1.6%, to \$41.95 per barrel.**

#### Kuwait Market

The market closed today up by +0.78%, re-opening the local economy , more liquidity expected in MSCI , also still with fear of the second wave Covid19 More than 1 million people have died of Covid-19 as of Tuesday, with fatalities and infections surging in several countries.

#### Saudi Market

The Market closed today down by -0.13% , linked to the slow economic recovery over the globe and re-opening the global economy and oil prices over \$40 a barrel.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



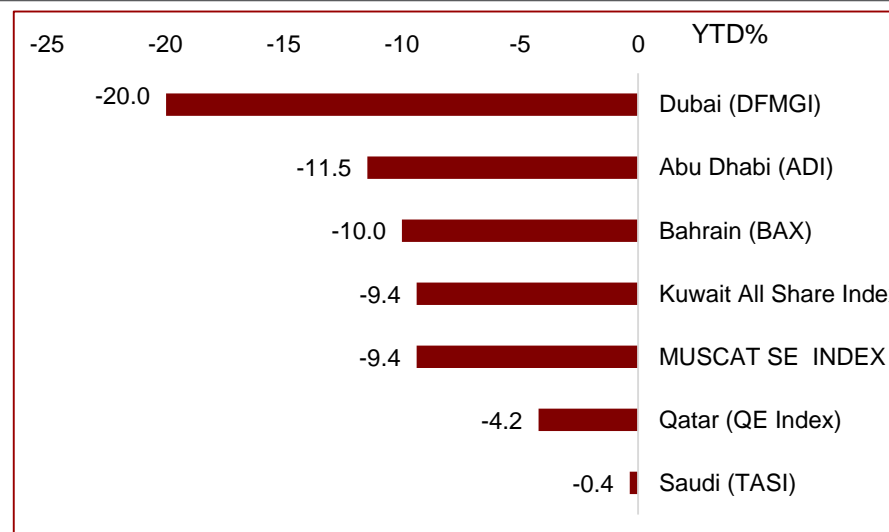
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	0.898	0.45	3.10	3.10	3.10	-11.98	6.13 KWD	1.73	21.46
KFH	0.699	0.87	5.90	5.90	5.90	-5.06	5.32 KWD	2.82	26.59
Zain	0.608	1.84	6.27	6.27	6.27	1.67	2.58 KWD	2.10	12.70
BOUBYAN BANK	0.615	0.16	3.87	3.87	3.87	1.23	1.86 KWD	3.26	36.98
Agility	0.700	1.89	6.54	6.54	6.54	-1.59	1.39 KWD	1.18	20.64
<b>Saudi Arabia</b>									
ARAMCO	35.80	-0.14	0.14	-0.28	-0.28	1.56	7,170.00 SAR	6.99	29.54
SABIC	88.80	0.00	0.34	0.45	0.45	-5.43	266.40 SAR	1.63	0.00
STC	103.80	-0.19	2.98	3.39	3.39	1.96	208.00 SAR	3.31	19.13
AL-RAJHI BANK	66.80	0.00	1.37	1.67	1.67	2.14	167.00 SAR	3.22	16.76
NCB	38.00	0.00	2.01	2.29	2.29	-22.84	114.00 SAR	1.55	10.50
<b>United Arab Emirates</b>									
ETISALAT.AD	16.86	0.96	1.08	0.84	0.84	2.69	145.24 AED	3.20	16.48
FAB.AD	11.10	0.00	-0.36	-1.25	-1.25	-26.78	121.21 AED	1.24	11.57
EMIRATES NBD	10.55	0.48	0.48	-0.94	-0.94	-18.85	66.32 AED	0.81	5.83
DB ISLAMIC BK	4.18	-0.48	-3.24	-3.24	-3.24	-24.14	30.41 AED	0.83	7.35
EMAAR PROPERT	2.65	-1.49	-6.03	-5.02	-5.02	-34.08	19.26 AED	0.35	3.78
<b>Qatar</b>									
QNB	17.95	-0.55	-0.28	-1.37	-1.37	-12.82	166.72 QAR	1.84	12.95
INDUSTRIES QAT	9.61	-3.88	-0.76	-0.20	-0.20	-4.38	60.49 QAR	1.87	37.80
QA ISLAMIC BK	16.58	0.48	-1.01	0.48	0.48	8.15	38.99 QAR	1.87	13.67
MASRAF AL RAYA	4.18	0.63	0.72	0.38	0.38	5.45	31.13 QAR	2.34	14.25
MESAIEED PETRO	2.10	-0.47	0.53	1.06	1.06	-16.29	26.51 QAR	1.72	25.95
<b>OMAN</b>									
BANK MUSCAT	0.366	0.55	2.79	2.79	2.79	-10.97	1.19 OMR	0.61	7.47
OMANTEL	0.632	1.28	0.00	0.00	0.00	2.60	0.47 OMR	0.88	6.83
BANK DHOFAR	0.103	0.00	-1.90	-1.90	-1.90	-16.26	0.31 QAR	0.45	20.20
NAT BANK OF OMAN	0.169	-0.59	2.42	2.42	2.42	-8.15	0.28 QAR	0.52	7.14
OMINVEST	0.322	0.00	0.61	0.61	0.61	0.61	0.27 QAR	1.07	6.31

### Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
23-Sep-20	16.80%	11.97%	0.07%	0.27%	0.31%	3.77%	3.55%	7.85%	3.55%	2.94%
30-Sep-20	16.84%	12.11%	0.07%	0.18%	0.31%	3.64%	3.60%	7.93%	3.65%	2.94%

### End of Report

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### Leading Sector Performance

The market are up today by +0.78 %The leading sector best performance indices today are Telecom 1.59 % Industrials 1.19 % Basic materials 1 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 20.76 % while the bottom sector performance is Consumer services by -29.73 %.

Telecommunication sector are up today by +1.59 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by +8.15 %.

### KSA

Saudi Armco are have negative performance today by -0.14 %, SABIC flat performance today 0 %

STC are have negative performance today by -0.19 %, Al Rajhi Bank flat performance today 0 %

### UAE

ETISALAT AD up by +0.96% , still outperform the market performance in year to date basis and act defensively with COVID19



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NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | [www.nic.com.kw](http://www.nic.com.kw)