



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

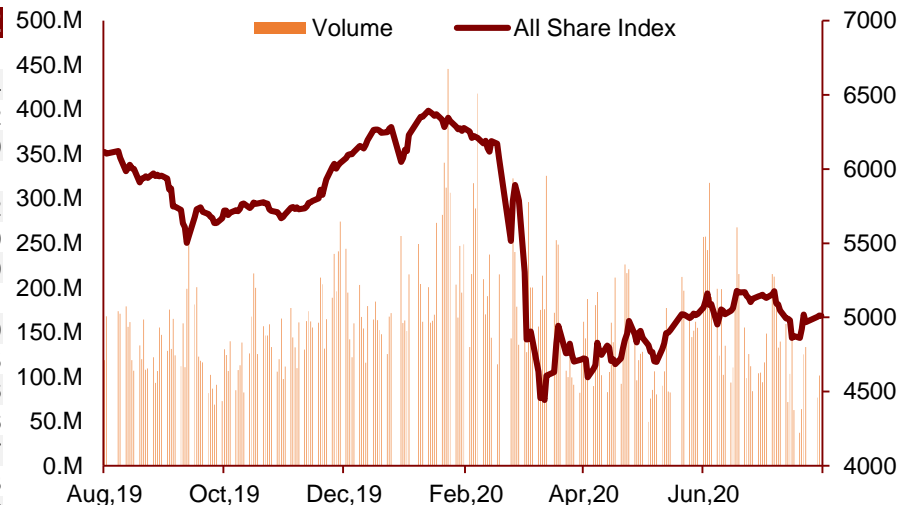
Thursday, August 6, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE	
Kuwait										
		%	%	%	%	%				
Kuwait All Share Index	5,009.79	-0.05	0.84	0.84	-2.36	-20.26	28.98 KWD	1.55	16.64	
Kuwait Premier Index	5,484.13	-0.12	1.27	1.27	-2.19	-21.39	21.10 KWD	1.65	17.22	
Kuwait Main Index	4,072.77	0.16	-0.32	-0.32	-2.80	-17.06	7.88 KWD	1.26	15.10	
Kuwait Sector										
Banking	1,138.46	0.01	1.29	1.29	-1.87	-23.21	16.84 KWD	1.62	17.52	
Telecom	1,017.09	-0.08	0.69	0.69	-1.85	-8.92	3.12 KWD	1.82	12.50	
Industrials	773.17	-0.49	-0.05	-0.05	-2.90	-16.64	2.76 KWD	1.25	17.00	
Financial services	827.63	-0.29	-1.03	-1.03	-4.64	-23.47	2.12 KWD	0.81	11.61	
Real estate	859.50	0.15	1.61	1.61	-3.78	-18.81	1.85 KWD	0.97	16.40	
Basic materials	767.03	-0.98	0.60	0.60	-6.18	-15.53	0.68 KWD	1.11	16.75	
Health care	839.19	0.00	0.00	0.00	2.21	-5.13	0.42 KWD	6.29	47.76	
Consumer services	744.32	0.11	-1.44	-1.44	-4.30	-30.58	0.39 KWD	1.42	8.76	
Insurance	962.87	2.55	2.63	2.63	0.79	0.94	0.35 KWD	0.84	7.87	
Consumer goods	727.14	0.66	0.51	0.51	-1.25	14.12	0.22 KWD	1.55	31.38	
Oil and Gas	1,043.76	0.21	-4.70	-4.70	-4.35	-15.70	0.22 KWD	1.45	8.67	
Technology	465.60	0.00	0.00	0.00	-5.88	-9.60	0.01 KWD	0.50	0.00	

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE	
GCC Markets										
		%	%	%	%	%				
Saudi (TASI)	7,499.97	0.40	0.55	0.55	3.82	-10.60	8,391 SAR	5.35	27.55	
Qatar (QE Index)	9,411.83	0.96	-0.26	-0.26	3.83	-10.38	499 QAR	1.64	32.92	
Dubai (DFMGI)	2,107.64	1.36	2.77	2.77	2.05	-23.77	227 AED	0.98	8.80	
Abu Dhabi (ADI)	4,359.59	1.25	1.27	1.27	1.72	-14.11	643 AED	4.47	19.15	
Bahrain (BAX)	1,288.83	-0.28	-0.13	-0.13	0.88	-19.96	14 BHD	1.04	16.53	
MUSCAT SE INDEX	3,568.10	0.28	0.12	1.48	1.48	-10.38	4 OMR	0.73	9.70	
Developed Markets										
MSCI World Index	2,355.94	0.82	2.21	2.21	7.00	-0.11				
U.S. (S&P 500)	3,327.77	0.64	1.73	1.73	7.34	3.00				
U.K. (FTSE 100)	5,997.76	-1.75	1.70	1.70	-2.79	-20.48				
Japan (Topix)	1,549.88	-0.31	3.60	3.60	-0.57	-9.96				
Emerging Markets										
MSCI EM Index	1,103.03	1.23	2.23	2.23	10.85	-1.04				
China (SSE Composite)	3,386.46	0.26	2.31	2.31	13.46	11.03				
India (Sensex)	38,025.45	0.96	1.13	1.13	8.93	-7.81				



What Move the GCC markets , Oil Prices

Oil prices were unchanged on Thursday, struggling to hold onto five-month highs reached in the previous session, as fuel demand worries caused by a second wave of coronavirus infections outweighed declines in the U.S. dollar.

U.S. central bankers said the resurgence in cases was slowing the economic recovery in the world's biggest oil consumer. **Brent crude futures rose 6 cents to \$45.23.**

Kuwait Market

The market are closed today flat by -0.05%, the hope of 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 . **Value traded over 25.7 Million KD.**

Saudi Market

The Market closed up today by +0.40% , 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



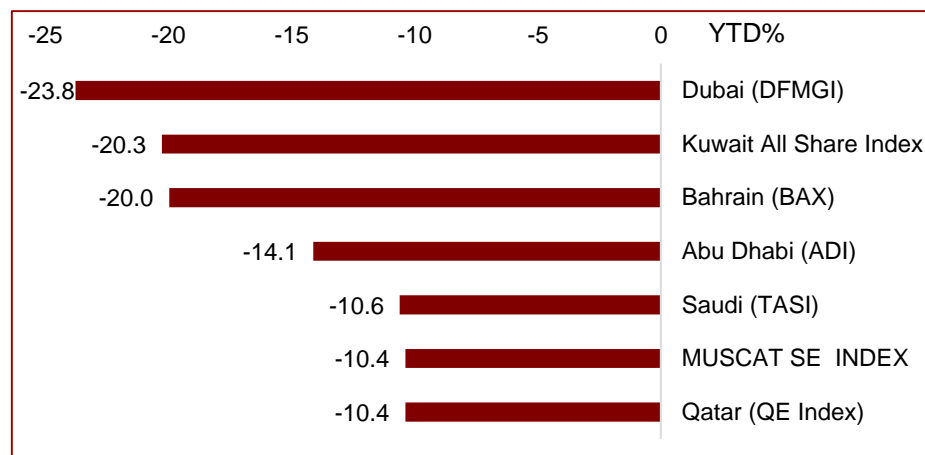
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.791	-0.63	0.25	0.25	-3.65	-22.38	5.42 KWD	1.53	19.11
KFH	0.588	0.00	1.73	1.73	-3.92	-20.25	4.51 KWD	1.97	18.08
Zain	0.554	-0.18	0.73	0.73	-0.18	-7.67	2.40 KWD	1.95	11.81
BOUBYAN BANK	0.538	0.00	1.32	1.32	1.13	-11.87	1.63 KWD	2.85	32.41
Agility	0.644	-0.16	0.63	0.63	0.90	-9.46	1.31 KWD	1.12	14.67
Saudi Arabia									
ARAMCO	32.95	-0.30	-0.15	-0.15	1.38	-6.52	6,611.06 SAR	6.17	21.21
SABIC	87.80	-0.23	-1.24	-1.24	-0.34	-6.50	264.04 SAR	1.58	221.09
STC	97.00	1.04	-0.21	-0.21	-2.02	-4.72	192.03 SAR	3.05	18.16
AL-RAJHI BANK	59.50	1.02	1.02	1.02	5.12	-9.02	147.27 SAR	2.84	15.03
NCB	36.70	0.96	1.10	1.10	-1.48	-25.48	109.07 SAR	1.70	10.08
United Arab Emirates									
ETISALAT.AD	16.68	1.46	-0.60	-0.60	0.24	1.10	145.06 AED	3.20	16.22
FAB.AD	11.12	1.46	1.10	1.10	-1.78	-27.18	121.43 AED	1.24	11.43
EMIRATES NBD	9.35	1.63	5.77	5.77	5.53	-28.08	59.06 AED	0.73	5.11
DB ISLAMIC BK	3.84	1.59	1.86	1.86	0.52	-30.31	27.80 AED	0.76	6.62
EMAAR PROPERT	2.69	2.28	4.67	4.67	-1.47	-33.08	19.26 AED	0.36	3.04
Qatar									
QNB	18.18	1.00	-0.11	-0.11	3.39	-12.68	167.92 QAR	1.85	12.92
INDUSTRIES QAT	8.05	3.21	2.51	2.51	4.16	-22.02	48.70 QAR	1.51	29.49
QA ISLAMIC BK	16.17	1.63	-1.12	-1.12	1.08	3.85	38.21 QAR	1.84	13.18
MASRAF AL RAYA	3.94	0.66	-0.20	-0.20	2.88	-0.76	29.54 QAR	2.22	13.43
MESAIEED PETRO	2.08	0.48	-0.24	-0.24	2.97	-17.13	26.13 QAR	1.81	26.88
OMAN									
BANK MUSCAT	0.350	0.58	0.00	3.57	3.57	-15.81	1.13 OMR	0.58	6.58
OMANTEL	0.608	0.00	0.66	-4.37	-4.37	-0.65	0.46 OMR	0.87	5.91
BANK DHOFAH	0.100	1.00	1.00	-3.81	-3.81	-17.89	0.30 QAR	0.44	18.87
NAT BANK OF OMAN	0.169	0.00	0.00	-2.87	-2.87	-8.15	0.27 QAR	0.52	6.60
OMINVEST	0.344	0.00	0.58	1.18	1.18	4.24	0.28 QAR	0.89	8.69

Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
29-Jul-20	16.46%	11.41%	0.08%	0.36%	0.33%	3.57%	3.36%	7.58%	3.38%	2.91%
5-Aug-20	16.51%	11.46%	0.08%	0.36%	0.33%	3.57%	3.36%	7.58%	3.41%	2.92%

End of Report

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Leading Sector Performance

Kuwait

The market are down today by -0.05 % The leading sector bottom performance indices today are Basic materials -0.98 % Industrials -0.49 % Financial services -0.29 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 14.12 % while the bottom sector performance is Consumer services by -30.58 %.

Telecommunication sector are down today by -0.08 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 11.34 %

KSA

Saudi Armco are have negative performance today by -0.3 %, SABIC have negative performance today by -0.23 %

STC are have positive performance today by + 1.04 %, Al Rajhi Bank have positive performance today by + 1.02 %

UAE

ETISALAT AD are up today by 1.46% , still outperform the market performance and act defensively with COVID19



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