



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

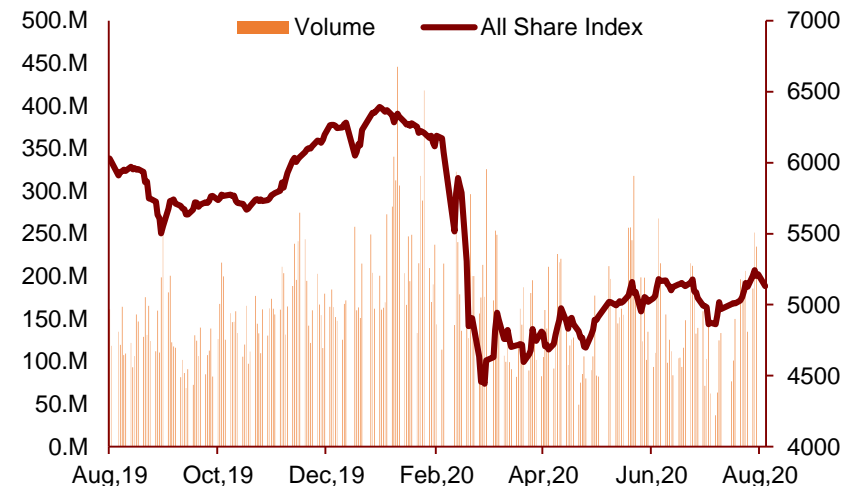
Sunday, August 23, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD			
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,131.25	-1.57	0.10	3.28	0.01	-18.32	29.78 KWD	1.69	18.48
Kuwait Permier Index	5,646.20	-1.89	-1.89	4.26	0.70	-19.06	21.83 KWD	1.83	19.16
Kuwait Main Index	4,113.54	-0.65	-0.65	0.67	-1.83	-16.23	7.95 KWD	1.33	16.62
Kuwait Sector									
Banking	1,182.98	-1.96	-1.96	5.25	1.97	-20.21	17.53 KWD	1.82	19.30
Telecom	1,059.91	-0.74	-0.74	4.93	2.28	-5.08	3.25 KWD	1.91	13.02
Industrials	751.47	-0.96	-0.96	-2.86	-5.62	-18.98	2.68 KWD	1.24	19.91
Financial services	846.82	-0.50	-0.50	1.26	-2.43	-21.70	2.17 KWD	0.92	11.02
Real estate	862.13	-1.75	-1.75	1.92	-3.48	-18.56	1.85 KWD	0.99	22.47
Basic materials	776.01	-1.69	-1.69	1.78	-5.08	-14.54	0.69 KWD	1.15	18.91
Health care	839.19	0.00	0.00	0.00	2.21	-5.13	0.42 KWD	6.14	52.50
Consumer services	714.90	-1.30	-1.30	-5.34	-8.08	-33.33	0.37 KWD	1.89	11.08
Insurance	935.94	-0.04	-0.04	-0.24	-2.03	-1.88	0.34 KWD	0.80	7.62
Consumer goods	773.65	-1.65	-1.65	6.94	5.07	21.42	0.24 KWD	1.60	28.95
Oil and Gas	1,095.36	-0.13	-0.13	0.01	0.38	-11.54	0.23 KWD	1.60	10.31
Technology	443.78	0.66	0.66	-4.69	-10.29	-13.84	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)	7,901.93	0.75	0.75	5.94	9.38	-5.81	8,686 SAR	5.74	26.09
Qatar (QE Index)	9,809.05	0.43	2.12	4.67	8.97	-5.94	518 QAR	1.70	62.18
Dubai (DFMGI)	2,235.58	-0.50	3.72	9.01	8.25	-19.14	241 AED	39.87	10.67
Abu Dhabi (ADI)	4,542.96	0.94	3.56	5.53	6.00	-10.50	686 AED	4.46	14.50
Bahrain (BAX)	1,354.99	-0.02	3.33	4.99	6.06	-15.85	15 BHD	1.21	14.79
MUSCAT SE INDEX	3,628.90	0.59	1.79	1.70	3.21	-8.85	4 OMR	0.75	10.65
Developed Markets									
MSCI World Index	2,392.11	0.12	0.33	3.78	8.64	1.43			
U.S. (S&P 500)	3,397.16	0.34	0.72	3.85	9.58	5.15			
U.K. (FTSE 100)	6,001.89	-0.19	-1.45	1.77	-2.72	-20.43			
Japan (Topix)	1,604.06	0.30	-1.19	7.22	2.91	-6.81			
Emerging Markets									
MSCI EM Index	1,091.85	1.05	-0.12	1.20	9.72	-2.05			
China (SSE Composite)	3,380.68	0.50	0.61	2.14	13.27	10.84			
India (Sensex)	38,434.72	0.56	1.47	2.20	10.08	-6.83			



What Move the GCC markets , Oil Prices

Oil prices dropped on Sunday as the economic recovery worldwide runs into stumbling blocks due to renewed coronavirus lockdowns, even as major global crude producers limit crude supply.

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 futures were down 84 cents, or 1.9%, at \$44.06 a barrel**

Kuwait Market

The market are closed today down by -1.57% due fear of the second coronavirus resurgence , while the market close +1.7% last week in positive territory 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

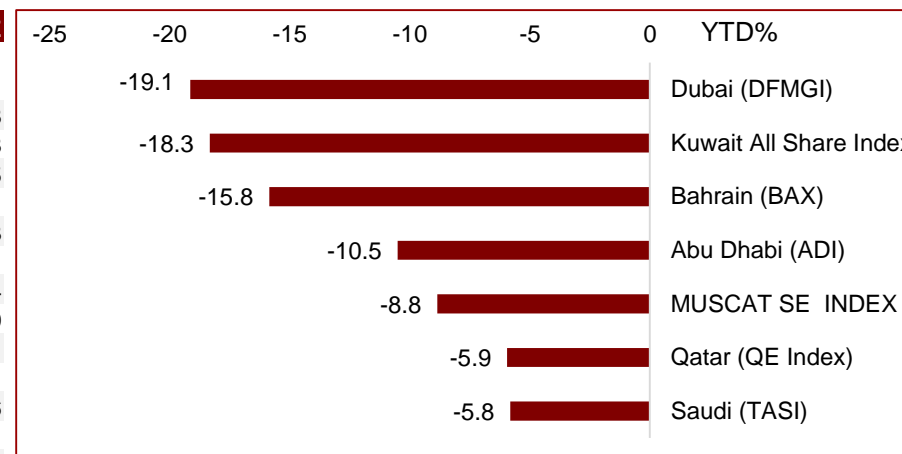
The Market closed up today by +0.75% , linked to the effect of the re-opining the local economy also the oil performance above 44\$ with the production cuts.

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	0.819	-1.56	0.61	3.80	-0.24	-19.63	5.61 KWD	1.58	19.98
KFH	0.607	-1.62	-1.14	5.02	-0.82	-17.67	4.66 KWD	2.47	23.68
Zain	0.584	-1.02	1.74	6.18	5.23	-2.67	2.53 KWD	2.06	12.55
BOUBYAN BANK	0.550	-2.31	-1.26	3.58	3.38	-9.91	1.67 KWD	2.92	33.91
Agility	0.608	-1.46	-5.15	-5.00	-4.74	-14.52	1.23 KWD	1.05	18.53
Saudi Arabia									
ARAMCO	34.10	-0.15	1.79	3.33	4.92	-3.26	6,829.64 SAR	6.66	28.14
SABIC	88.70	0.34	-0.11	-0.22	0.68	-5.54	265.20 SAR	1.62	0.00
STC	96.70	0.10	0.00	-0.51	-2.32	-5.01	193.19 SAR	3.07	18.01
AL-RAJHI BANK	65.10	0.31	3.66	10.53	15.02	-0.46	162.24 SAR	3.12	16.51
NCB	39.05	1.17	5.26	7.58	4.83	-20.71	115.79 SAR	1.58	10.86
United Arab Emirates									
ETISALAT.AD	16.94	-0.24	1.93	1.80	2.67	3.55	147.32 AED	3.25	16.75
FAB.AD	11.40	0.71	2.89	4.40	1.42	-24.80	124.49 AED	1.27	11.80
EMIRATES NBD	10.65	-0.47	9.23	20.48	20.20	-18.08	67.27 AED	0.83	5.95
DB ISLAMIC BK	4.06	-1.22	4.37	7.69	6.28	-26.32	29.40 AED	0.80	7.19
EMAAR PROPERT	2.91	-0.68	4.68	13.23	6.59	-27.61	20.83 AED	0.37	4.12
Qatar									
QNB	18.44	-0.32	0.83	1.83	5.41	-10.98	170.32 QAR	1.88	13.27
INDUSTRIES QAT	9.40	4.44	4.44	20.22	22.15	-8.55	56.88 QAR	1.76	34.03
QA ISLAMIC BK	16.17	0.12	0.25	0.43	2.67	5.48	38.21 QAR	1.84	13.38
MASRAF AL RAYA	4.12	-0.75	2.36	4.55	7.77	3.96	30.89 QAR	2.32	14.25
MESAEED PETRO	2.11	-0.61	-1.81	1.25	4.51	-15.90	26.52 QAR	1.72	26.13
OMAN									
BANK MUSCAT	0.386	0.53	7.91	9.14	13.69	-7.58	1.24 OMR	0.64	7.76
OMANTEL	0.612	0.00	0.00	0.66	-4.37	-0.65	0.46 OMR	0.87	6.70
BANK DHOFAR	0.112	0.00	3.00	3.00	-1.90	-16.26	0.31 QAR	0.45	20.20
NAT BANK OF OMAN	0.179	1.71	5.33	5.33	2.30	-3.26	0.29 QAR	0.55	7.35
OMINVEST	0.338	0.00	0.00	-1.74	-0.59	2.42	0.27 QAR	1.09	6.43



Leading Sector Performance

Kuwait

The market are down today by -1.57 % The leading sector bottom performance indices today are Banking -1.96 % Real estate -1.75 % Basic materials -1.69 % respectively

from YTD performance perspective the best sector performance are Consumer goods by 21.42 % while the bottom sector performance is Consumer services by -33.33 %

Telecommunication sector are down today by -0.74 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 13.24 %

KSA

Saudi Armco are have negative performance today by -0.15 %, SABIC have positive performance today by + 0.34 %

STC are have positive performance today by + 0.1 %, Al Rajhi Bank have positive performance today by + 0.31 %

UAE

ETISALAT AD are down today by -0.24% , still outperform the market performance and act defensively with COVID19

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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