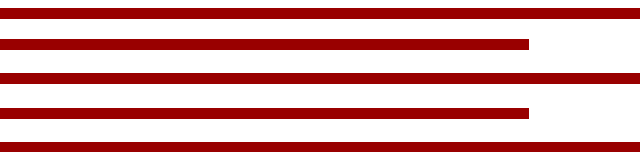


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

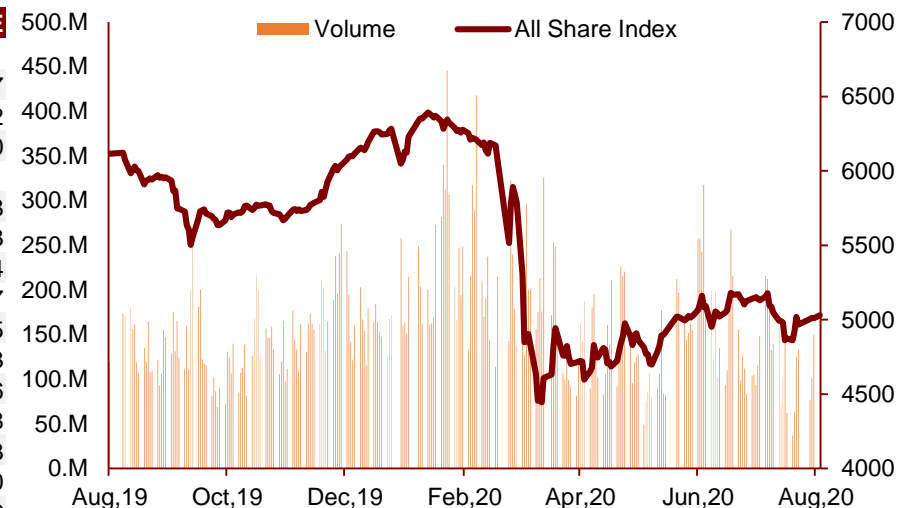
Monday, August 10, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	5,053.36	0.48	0.87	1.71	-1.51	-19.56	29.26 KWD	1.63	17.37
Kuwait Permier Index	5,546.95	0.64	1.15	2.43	-1.07	-20.48	21.35 KWD	1.76	18.22
Kuwait Main Index	4,077.72	0.06	0.12	-0.20	-2.68	-16.96	7.91 KWD	1.26	15.10
Kuwait Sector									
Banking	1,152.30	0.65	1.22	2.52	-0.68	-22.28	17.06 KWD	1.76	18.78
Telecom	1,029.30	0.67	1.20	1.90	-0.67	-7.83	3.16 KWD	1.85	12.53
Industrials	767.64	-0.32	-0.72	-0.77	-3.59	-17.24	2.75 KWD	1.23	16.94
Financial services	823.94	0.29	-0.45	-1.47	-5.07	-23.81	2.13 KWD	0.81	11.67
Real estate	860.13	0.38	0.07	1.69	-3.71	-18.75	1.85 KWD	0.97	16.25
Basic materials	781.13	-0.13	1.84	2.45	-4.45	-13.98	0.70 KWD	1.12	16.73
Health care	839.19	0.00	0.00	0.00	2.21	-5.13	0.42 KWD	6.29	47.76
Consumer services	751.74	0.90	1.00	-0.46	-3.34	-29.89	0.39 KWD	1.44	7.88
Insurance	954.79	-1.64	-0.84	1.77	-0.06	0.10	0.35 KWD	0.83	8.13
Consumer goods	761.18	3.33	4.68	5.22	3.37	19.46	0.23 KWD	1.63	32.00
Oil and Gas	1,105.16	-0.03	5.88	0.90	1.28	-10.74	0.23 KWD	1.57	9.16
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)	7,535.96	0.08	0.48	1.03	4.32	-10.17	8,404 SAR	5.35	20.60
Qatar (QE Index)	9,417.88	0.20	0.11	0.58	4.71	-9.62	501 QAR	1.64	33.02
Dubai (DFMGI)	2,093.80	0.01	-0.66	2.10	1.38	-24.27	226 AED	0.98	8.87
Abu Dhabi (ADI)	4,353.72	0.51	-0.13	1.14	1.58	-14.23	638 AED	4.45	19.28
Bahrain (BAX)	1,299.94	0.54	0.86	0.73	1.75	-19.27	14 BHD	1.06	16.45
MUSCAT SE INDEX	3,576.75	-0.30	0.24	0.24	1.73	-10.16	4 OMR	0.74	10.81
Developed Markets									
MSCI World Index	2,355.97	-0.17	0.00	2.21	7.00	-0.11			
U.S. (S&P 500)	3,351.28	0.00	2.45	2.45	8.10	3.73			
U.K. (FTSE 100)	6,051.67	0.32	0.32	2.61	-1.91	-19.77			
Japan (Topix)	1,546.74	-0.20	3.39	3.39	-0.77	-10.14			
Emerging Markets									
MSCI EM Index	1,089.32	-1.56	0.00	0.96	9.47	-2.27			
China (SSE Composite)	3,379.25	0.75	0.75	2.09	13.22	10.79			
India (Sensex)	38,182.08	0.37	0.45	1.61	9.44	-7.37			



What Move the GCC markets , Oil Prices

Oil prices climbed on Monday, supported by Saudi optimism on Asian demand and an Iraqi pledge to deepen supply cuts, although uncertainty over a deal to shore up the U.S. economic recovery capped gains.

On the supply side, Iraq said on Friday it would cut its oil output by a further 400,000 barrels per day. **Brent crude futures were up 40 cents, or 0.9%, at \$44.80 a barrel.**

Kuwait Market

The market are closed today up by +0.48%, 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 29.1Million KD.**

Saudi Market

The Market closed up today by +0.08% , linked to the effect of the re-opening the local economy also the oil performance above 44\$ with the production cuts.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



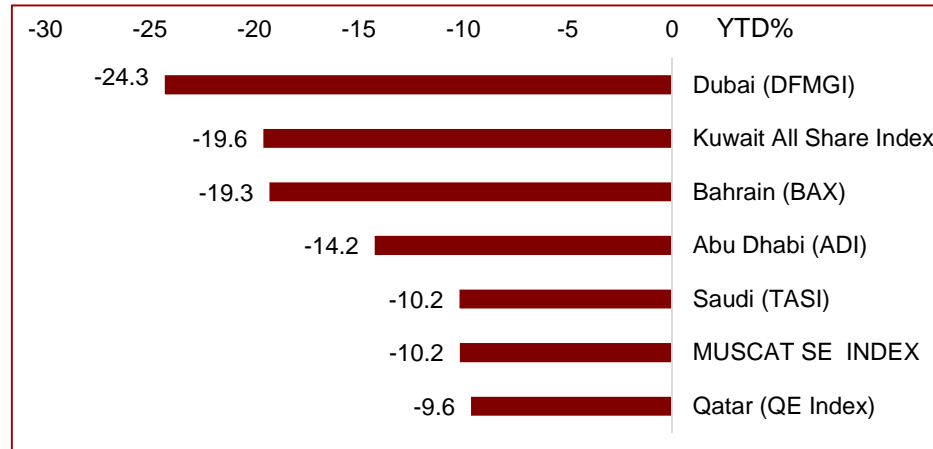
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.801	1.01	1.26	1.52	-2.44	-21.40	5.49 KWD	1.55	19.04
KFH	0.596	0.51	1.36	3.11	-2.61	-19.16	4.57 KWD	2.43	22.76
Zain	0.563	0.90	1.62	2.36	1.44	-6.17	2.44 KWD	1.98	11.87
BOUBYAN BANK	0.542	0.74	0.74	2.07	1.88	-11.22	1.64 KWD	2.87	32.41
Agility	0.640	-0.16	-0.62	0.00	0.27	-10.02	1.30 KWD	1.11	14.58
Saudi Arabia									
ARAMCO	33.10	0.15	0.46	0.30	1.85	-6.10	6,612.12 SAR	6.17	21.18
SABIC	87.60	-0.11	-0.23	-1.46	-0.57	-6.71	263.18 SAR	1.58	0.00
STC	96.00	-0.72	-1.03	-1.23	-3.03	-5.70	193.46 SAR	3.07	18.12
AL-RAJHI BANK	60.00	0.00	0.84	1.87	6.01	-8.26	150.05 SAR	2.89	15.18
NCB	36.70	0.00	0.00	1.10	-1.48	-25.48	110.14 SAR	1.71	10.19
United Arab Emirates									
ETISALAT.AD	16.60	0.00	-0.24	0.00	0.85	1.71	144.37 AED	3.18	16.38
FAB.AD	11.04	0.36	-0.90	0.92	-1.96	-27.31	120.12 AED	1.23	11.47
EMIRATES NBD	9.27	0.22	-1.60	4.07	3.84	-29.23	58.55 AED	0.72	5.14
DB ISLAMIC BK	3.83	0.52	-0.26	1.59	0.26	-30.49	27.66 AED	0.76	6.67
EMAAR PROPERT	2.68	0.75	-0.37	4.28	-1.83	-33.33	19.12 AED	0.35	3.07
Qatar									
QNB	18.03	-0.33	-0.44	0.56	4.08	-12.09	168.14 QAR	1.84	12.98
INDUSTRIES QAT	8.15	1.43	1.18	4.16	5.83	-20.77	48.89 QAR	1.53	30.36
QA ISLAMIC BK	16.15	0.31	-0.12	0.31	2.54	5.35	38.28 QAR	1.83	13.34
MASRAF AL RAYA	3.95	0.51	0.30	0.30	3.40	-0.25	29.66 QAR	2.23	13.50
MESAIEED PETRO	2.08	0.10	0.10	-0.14	3.07	-17.05	26.21 QAR	1.81	26.92
OMAN									
BANK MUSCAT	0.354	-1.12	1.14	1.14	5.36	-14.35	1.16 OMR	0.60	7.31
OMANTEL	0.616	0.00	1.32	1.32	-3.75	0.00	0.46 OMR	0.87	6.75
BANK DHOFAR	0.100	-0.99	0.00	0.00	-4.76	-18.70	0.30 QAR	0.44	19.80
NAT BANK OF OMAN	0.165	0.00	0.00	0.00	-2.87	-8.15	0.27 QAR	0.52	7.10
OMINVEST	0.338	-1.74	-1.74	-1.74	-0.59	2.42	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 up today by +0.48 % The leading sector best performance indices today are Consumer goods 3.33 % Consumer services 0.9 % Telecom 0.67 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 19.46 % while the bottom sector performance is Consumer services by -29.89 %

Telecommunication sector are up today by +0.53 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by +11.51 %

KSA

Saudi Armco are have positive performance today by +0.15 %, SABIC have negative performance today by -0.11 %

STC are have negative performance today by -0.72 %, Al Rajhi Bank flat performance today 0 %

UAE

ETISALAT AD are down today by -0.48% , still outperform the market performance and act defensively with COVID19



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