



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

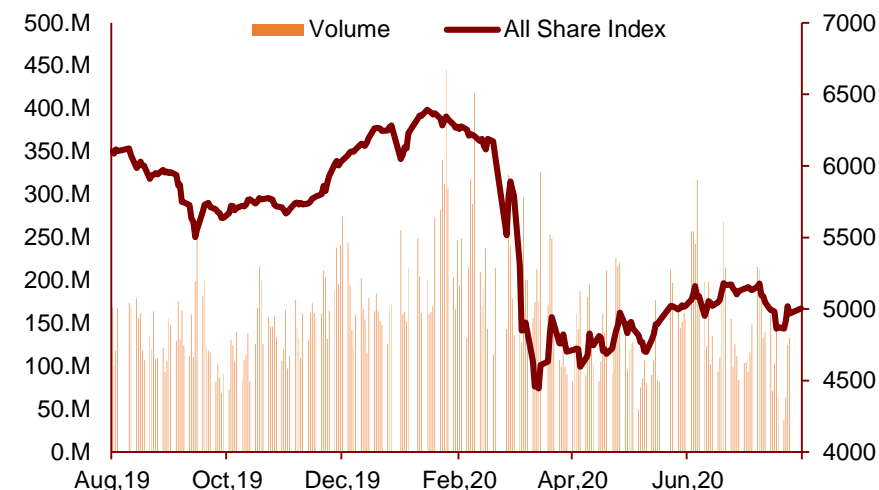
Tuesday, August 4, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	5,004.38	0.73	0.73	0.73	-2.46	-20.34	28.95 KWD	1.54	16.23
Kuwait Permier Index	5,472.07	1.05	1.05	1.05	-2.41	-21.56	21.06 KWD	1.65	16.64
Kuwait Main Index	4,080.70	-0.13	-0.13	-0.13	-2.61	-16.90	7.89 KWD	1.26	15.13
Kuwait Sector									
Banking	1,135.85	1.06	1.06	1.06	-2.10	-23.39	16.81 KWD	1.62	17.33
Telecom	1,016.26	0.61	0.61	0.61	-1.93	-8.99	3.12 KWD	1.82	12.38
Industrials	776.32	0.35	0.35	0.35	-2.50	-16.30	2.78 KWD	1.28	16.91
Financial services	833.56	-0.32	-0.32	-0.32	-3.96	-22.92	2.13 KWD	0.81	11.58
Real estate	849.04	0.38	0.38	0.38	-4.95	-19.80	1.83 KWD	0.90	12.01
Basic materials	764.56	0.28	0.28	0.28	-6.48	-15.81	0.68 KWD	1.11	16.47
Health care	839.19	0.00	0.00	0.00	2.21	-5.13	0.42 KWD	6.29	47.76
Consumer services	745.51	-1.29	-1.29	-1.29	-4.14	-30.47	0.39 KWD	1.41	8.93
Insurance	956.10	1.91	1.91	1.91	0.08	0.23	0.35 KWD	0.82	7.83
Consumer goods	727.52	0.56	0.56	0.56	-1.20	14.18	0.22 KWD	1.55	31.43
Oil and Gas	1,092.54	-0.25	-0.25	-0.25	0.12	-11.76	0.23 KWD	1.63	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)	7,459.21	0.05	0.44	3.25	3.25	-11.09	8,380 SAR	5.34	28.47
Qatar (QE Index)	9,368.17	-0.04	0.00	4.11	4.11	-10.14	497 QAR	1.63	33.38
Dubai (DFMGI)	2,078.79	0.65	1.37	1.37	0.65	-24.81	224 AED	0.97	8.69
Abu Dhabi (ADI)	4,318.00	-0.14	0.31	0.31	0.75	-14.93	643 AED	4.39	18.40
Bahrain (BAX)	1,290.57	0.11	0.46	1.01	1.01	-19.85	14 BHD	1.02	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	2,324.08	0.83	0.83	0.83	5.55	-1.46			
U.S. (S&P 500)	3,294.61	0.00	0.72	0.72	6.27	1.98			
U.K. (FTSE 100)	6,044.31	0.19	2.48	2.48	-2.03	-19.86			
Japan (Topix)	1,555.26	2.14	3.96	3.96	-0.23	-9.65			
Emerging Markets									
MSCI EM Index	1,077.87	-0.10	-0.10	-0.10	8.32	-3.30			
China (SSE Composite)	3,371.69	0.11	1.86	1.86	12.97	10.54			
India (Sensex)	37,687.91	2.03	0.22	0.22	7.94	-8.64			



What Move the GCC markets , Oil Prices

Oil prices eased on Tuesday amid concerns that a fresh wave of COVID-19 infections will see a global demand recovery stalling due to tighter lockdowns, just as major producers ramp up output.

Inventories of crude oil in the U.S. dropped by 6.8 million barrels last week to 531 million barrels, data from industry group the American Petroleum Institute showed on Tuesday. **while Brent crude futures were 72 cents, or 1.7%, lower at \$43.43 a barrel.**

Kuwait Market

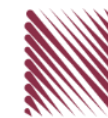
The market are closed today up by +0.73%, the hope of re- opening the local economy and the effect of demand recovery and production cut effect on the oil prices also the positive effect on inflows from MSCI in Nov 2020 . **Value traded over 19.7 Million KD.**

Saudi Market

The Market closed up last week by +0.44% , linked to the effect of the re-opening the local economy also the oil performance above 43\$ with the production cuts.

DAILY MARKETS WRAP,

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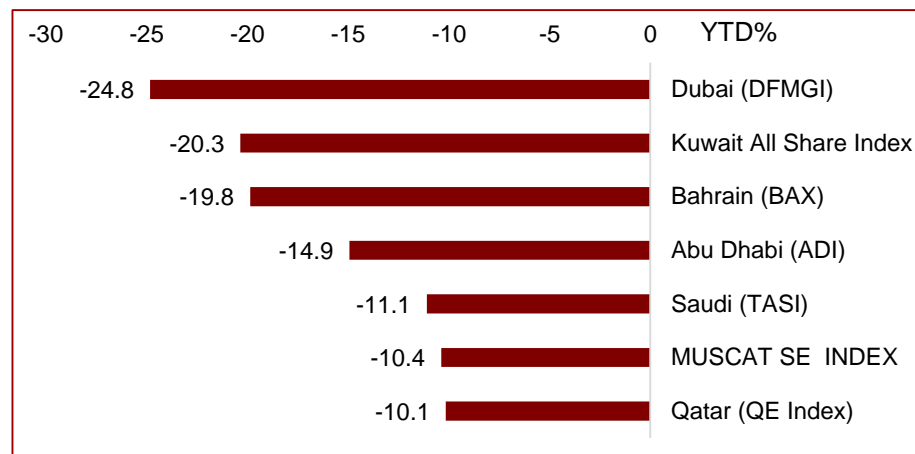
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.798	1.14	1.14	1.14	-2.80	-21.69	5.47 KWD	1.54	18.94
KFH	0.584	1.04	1.04	1.04	-4.58	-20.79	4.48 KWD	1.96	17.78
Zain	0.554	0.73	0.73	0.73	-0.18	-7.67	2.40 KWD	1.95	11.70
BOUBYAN BANK	0.535	0.75	0.75	0.75	0.56	-12.36	1.62 KWD	2.84	31.99
Agility	0.646	0.94	0.94	0.94	1.21	-9.18	1.31 KWD	1.12	14.56
Saudi Arabia									
ARAMCO	33.00	0.15	0.00	1.54	1.54	-6.38	6,600.00 SAR	6.17	21.05
SABIC	88.90	0.45	1.02	0.91	0.91	-5.32	266.74 SAR	1.60	217.86
STC	97.20	0.10	0.10	-1.82	-1.82	-4.52	194.43 SAR	3.09	18.14
AL-RAJHI BANK	58.90	-0.17	1.90	4.06	4.06	-9.94	147.25 SAR	2.97	15.01
NCB	36.30	0.83	1.26	-2.55	-2.55	-26.29	108.91 SAR	1.69	9.37
United Arab Emirates									
ETISALAT.AD	16.54	-0.60	-0.36	-0.36	0.48	1.34	143.84 AED	3.17	16.42
FAB.AD	11.04	0.36	1.10	1.10	-1.78	-27.18	120.56 AED	1.23	11.47
EMIRATES NBD	9.12	0.88	3.17	3.17	2.93	-29.85	57.61 AED	0.71	5.02
DB ISLAMIC BK	3.79	-0.52	0.53	0.53	-0.79	-31.22	27.44 AED	0.75	6.67
EMAAR PROPERT	2.62	2.34	1.95	1.95	-4.03	-34.83	18.76 AED	0.35	2.96
Qatar									
QNB	18.00	-0.50	-0.50	3.51	3.51	-12.58	166.26 QAR	1.83	12.98
INDUSTRIES QAT	7.82	-0.08	-4.05	1.61	1.61	-23.93	47.31 QAR	1.46	29.20
QA ISLAMIC BK	16.10	0.06	0.63	2.22	2.22	5.02	38.04 QAR	1.83	13.33
MASRAF AL RAYA	3.94	0.79	1.23	3.09	3.09	-0.56	29.54 QAR	2.22	13.42
MESAIEED PETRO	2.09	-0.71	0.19	3.22	3.22	-16.93	26.19 QAR	1.82	27.27
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 DHOFAR	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
22-Jul-20	16.47%	11.62%	0.09%	0.38%	0.33%	3.56%	3.38%	7.60%	3.37%	2.92%
29-Jul-20	16.46%	11.41%	0.08%	0.36%	0.33%	3.57%	3.36%	7.58%	3.38%	2.91%

End of Report

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Leading Sector Performance

Kuwait

The market are up today by +0.73 %The leading sector best performance indices today are Insurance 1.91 % Banking 1.06 % Telecom 0.61 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 14.18 % while the bottom sector performance is Consumer services by -30.47 %

KFH has a positive price return performance spread over NBK in YTD perspective by +0.90%. Banking sector performance year to date are -23.39 %.

KSA

Saudi Armco are have positive performance today by +0.15 %, SABIC have positive performance today by +0.45 %

STC are have positive performance today by +0.1 %, Al Rajhi Bank have negative performance today by -0.17 %

UAE

ETISALAT AD are down today by -0.6% , still outperform the market performance and act defensively with COVID19



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