



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

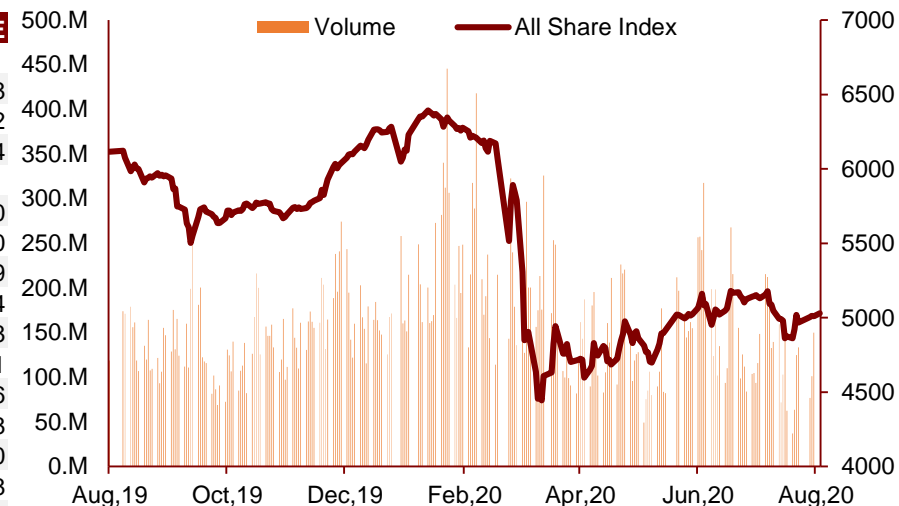
Tuesday, August 11, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,099.57	0.91	1.79	2.64	-0.61	-18.83	29.54 KWD	1.66	17.48
Kuwait Permier Index	5,608.00	1.10	2.26	3.56	0.02	-19.61	21.59 KWD	1.79	18.42
Kuwait Main Index	4,094.22	0.40	0.53	0.20	-2.29	-16.63	7.94 KWD	1.29	14.94
Kuwait Sector									
Banking	1,167.44	1.31	2.55	3.87	0.63	-21.26	17.29 KWD	1.79	18.90
Telecom	1,036.94	0.74	1.95	2.66	0.07	-7.14	3.18 KWD	1.86	12.60
Industrials	767.03	-0.08	-0.79	-0.85	-3.67	-17.30	2.75 KWD	1.23	16.89
Financial services	823.69	-0.03	-0.48	-1.50	-5.10	-23.84	2.13 KWD	0.83	11.74
Real estate	863.64	0.41	0.48	2.10	-3.32	-18.42	1.86 KWD	0.98	16.48
Basic materials	785.50	0.56	2.41	3.02	-3.92	-13.50	0.70 KWD	1.13	16.71
Health care	839.19	0.00	0.00	0.00	2.21	-5.13	0.42 KWD	6.29	47.76
Consumer services	747.63	-0.55	0.44	-1.00	-3.87	-30.28	0.39 KWD	1.43	7.98
Insurance	968.35	1.42	0.57	3.22	1.36	1.52	0.36 KWD	0.84	8.00
Consumer goods	780.96	2.60	7.40	7.95	6.06	22.57	0.24 KWD	1.67	33.08
Oil and Gas	1,111.60	0.58	6.50	1.49	1.87	-10.22	0.23 KWD	1.56	9.11
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)	7,626.23	1.20	1.68	2.24	5.57	-9.09	8,411 SAR	5.36	25.38
Qatar (QE Index)	9,523.63	1.12	1.75	2.23	6.43	-8.14	503 QAR	1.65	33.25
Dubai (DFMGI)	2,097.23	0.16	-0.49	2.27	1.55	-24.15	226 AED	0.98	8.95
Abu Dhabi (ADI)	4,368.21	0.33	0.20	1.47	1.92	-13.94	653 AED	4.66	19.79
Bahrain (BAX)	1,307.47	0.58	1.45	1.31	2.34	-18.80	14 BHD	1.07	16.29
MUSCAT SE INDEX	3,572.62	-0.12	0.13	0.13	1.61	-10.26	4 OMR	0.73	10.68
Developed Markets									
MSCI World Index	2,360.87	0.21	0.21	2.42	7.23	0.10			
U.S. (S&P 500)	3,360.47	0.27	0.27	2.73	8.39	4.01			
U.K. (FTSE 100)	6,171.88	2.00	2.32	4.65	0.03	-18.17			
Japan (Topix)	1,585.96	2.54	2.54	6.01	1.74	-7.87			
Emerging Markets									
MSCI EM Index	1,086.45	-0.26	-0.26	0.70	9.18	-2.53			
China (SSE Composite)	3,340.29	-1.15	-0.41	0.91	11.91	9.51			
India (Sensex)	38,407.01	0.59	1.00	2.16	10.04	-6.87			



What Move the GCC markets , Oil Prices

Crude oil gained more ground on Tuesday, with prices underpinned by expectations of U.S. stimulus and a rebound in Asian demand as economies reopen and new vaccine hope

On the supply side, Iraq said on Friday it would cut its oil output by a further 400,000 barrels per day. **Brent crude added 22 cents, or 0.5%, to \$45.21 a barrel**

Kuwait Market

The market are closed today up by +0.91%, 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 38 Million KD.**

Saudi Market

The Market closed up today by +1.2% , linked to the effect of the re-opining the local economy also the oil performance above 45\$ with the production cuts.

DAILY MARKETS WRAP,

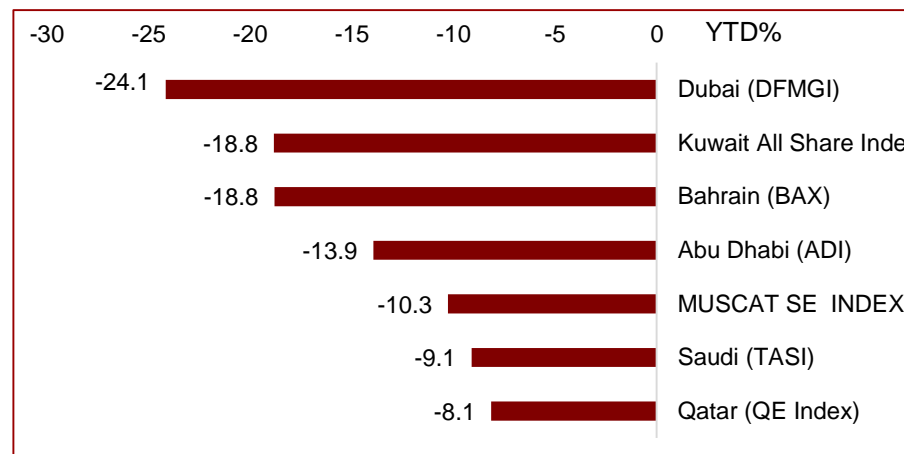
NIC RESEARCH AND STUDIES DEP



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE	
Blue Chip Watch										
Kuwait										
NBK	0.808	0.87	2.15	2.41	-1.58	-20.71	5.53 KWD	1.56	19.23	
KFH	0.605	1.51	2.89	4.67	-1.14	-17.94	4.64 KWD	2.46	22.87	
Zain	0.569	1.07	2.71	3.45	2.52	-5.17	2.46 KWD	2.01	11.98	
BOUBYAN BANK	0.554	2.21	2.97	4.33	4.14	-9.25	1.68 KWD	2.94	32.65	
Agility	0.642	0.31	-0.31	0.31	0.59	-9.74	1.30 KWD	1.12	14.56	
Saudi Arabia										
ARAMCO	33.30	0.60	1.06	0.91	2.46	-5.53	6,619.65 SAR	6.18	27.24	
SABIC	87.90	0.34	0.11	-1.12	-0.23	-6.39	262.79 SAR	1.57	0.00	
STC	96.50	0.52	-0.52	-0.72	-2.53	-5.21	191.99 SAR	3.05	18.07	
AL-RAJHI BANK	61.90	3.17	4.03	5.09	9.36	-5.35	149.99 SAR	2.89	15.31	
NCB	36.90	0.54	0.55	1.65	-0.94	-25.08	110.09 SAR	1.50	10.29	
United Arab Emirates										
ETISALAT.AD	16.54	-0.36	-0.96	-0.72	0.12	0.98	143.84 AED	3.17	16.38	
FAB.AD	11.06	0.18	-0.36	1.47	-1.42	-26.91	120.78 AED	1.24	11.51	
EMIRATES NBD	9.26	-0.11	-1.07	4.64	4.40	-28.85	58.49 AED	0.72	5.15	
DB ISLAMIC BK	3.82	0.00	-0.52	1.33	0.00	-30.67	27.66 AED	0.76	6.69	
EMAAR PROPERT	2.69	0.75	0.00	4.67	-1.47	-33.08	19.26 AED	0.36	3.08	
Qatar										
QNB	18.00	-0.17	-0.99	0.00	3.51	-12.58	166.26 QAR	1.83	12.94	
INDUSTRIES QAT	8.58	5.33	8.19	11.37	13.16	-15.28	51.90 QAR	1.61	30.79	
QA ISLAMIC BK	16.15	0.00	-0.12	0.31	2.54	5.35	38.16 QAR	1.83	13.38	
MASRAF AL RAYA	3.97	0.53	0.84	0.84	3.95	0.28	29.78 QAR	2.24	13.56	
MESAIIEED PETRO	2.10	1.20	1.88	1.63	4.90	-15.58	26.38 QAR	1.83	26.95	
OMAN										
BANK MUSCAT	0.358	0.00	2.29	2.29	6.55	-13.39	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	0.00	0.00	0.00	-4.76	-18.70	0.30 QAR	0.44	19.61	
NAT BANK OF OMAN	0.169	0.00	0.00	0.00	-2.87	-8.15	0.27 QAR	0.52	7.10	
OMINVEST	0.338	0.00	-1.74	-1.74	-0.59	2.42	0.27 QAR	0.88	8.54	
Foreign Holdings										
Date	NBK	GBK	CBK	ABK	MUTAHEED	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 +0.91 % The leading sector best performance indices today are Consumer goods 2.6 % Insurance 1.42 % Banking 1.31 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 22.57 % while the bottom sector performance is Consumer services by -30.28 %

Telecommunication sector are up today by +0.74 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by +11.69 %

KSA

Saudi Armco are have positive performance today by +0.6 %, SABIC have positive performance today by +0.34 %

STC are have positive performance today by +0.52 %, Al Rajhi Bank have positive performance today by +3.17 %

UAE

ETISALAT AD are down today by -0.36% , still outperform the market performance and act defensively with COVID19



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