



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

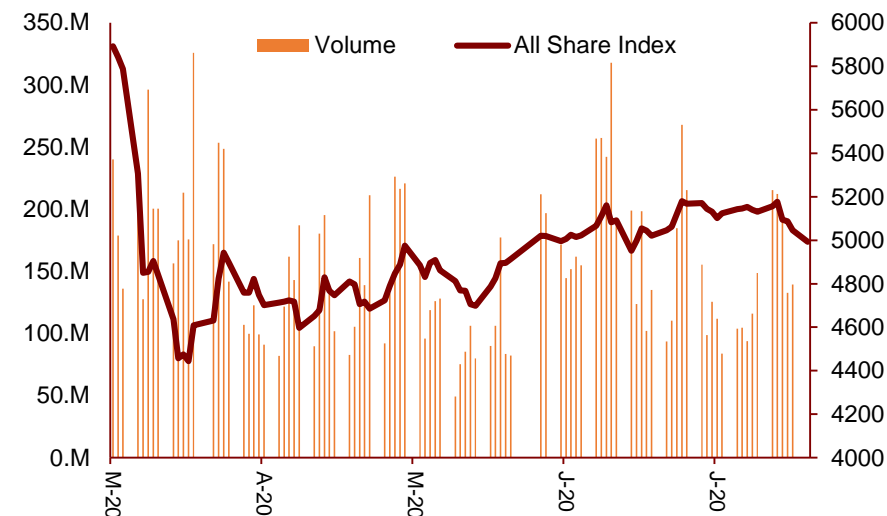
Sunday, July 19, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	4,993.25	-1.05	-1.05	-2.68	-2.68	-20.52	28.91 KWD	1.49	15.07
Kuwait Permier Index	5,436.50	-1.18	-1.18	-3.04	-3.04	-22.07	20.96 KWD	1.58	15.11
Kuwait Main Index	4,118.72	-0.69	-0.69	-1.70	-1.70	-16.13	7.95 KWD	1.25	14.99
Kuwait Sector									
Banking	1,127.22	-1.16	-1.16	-2.84	-2.84	-23.97	16.72 KWD	1.52	15.46
Telecom	1,011.18	-1.20	-1.20	-2.42	-2.42	-9.45	3.10 KWD	1.77	11.39
Industrials	776.26	-0.56	-0.56	-2.51	-2.51	-16.31	2.77 KWD	1.34	16.42
Financial services	837.00	-1.09	-1.09	-3.56	-3.56	-22.61	2.13 KWD	0.81	11.84
Real estate	858.26	-1.55	-1.55	-3.92	-3.92	-18.93	1.85 KWD	0.91	12.40
Basic materials	836.39	0.04	0.04	2.31	2.31	-7.90	0.74 KWD	1.19	18.22
Health care	839.19	0.00	0.00	2.21	2.21	-5.13	0.42 KWD	6.29	47.76
Consumer services	747.49	-1.29	-1.29	-3.89	-3.89	-30.29	0.39 KWD	1.41	8.99
Insurance	938.78	-0.07	-0.07	-1.73	-1.73	-1.58	0.35 KWD	0.78	8.07
Consumer goods	710.85	1.05	1.05	-3.46	-3.46	11.56	0.22 KWD	1.51	30.57
Oil and Gas	1,093.55	0.02	0.02	0.22	0.22	-11.68	0.23 KWD	1.63	9.15
Technology	465.60	0.00	0.00	-5.88	-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)	7,423.23	-0.05	-0.05	2.76	2.76	-11.51	8,448 SAR	5.41	29.24
Qatar (QE Index)	9,316.51	0.06	0.06	3.63	3.63	-10.56	494 QAR	1.66	31.85
Dubai (DFMGI)	2,061.43	0.43	0.43	-0.19	-0.19	-25.44	222 AED	0.96	7.90
Abu Dhabi (ADI)	4,255.78	-0.44	-0.44	-0.70	-0.70	-16.15	595 AED	4.10	18.35
Bahrain (BAX)	1,291.16	-0.87	-0.87	1.06	1.06	-19.81	14 BHD	0.97	16.52
MUSCAT SE INDEX	3,451.41	0.04	0.04	-1.84	-1.84	-13.31	4 OMR	0.73	9.36
Developed Markets									
MSCI World Index	2,293.92	0.22	1.52	4.18	4.18	-2.74			
U.S. (S&P 500)	3,224.73	0.28	1.25	4.01	4.01	-0.19			
U.K. (FTSE 100)	6,290.30	0.63	3.20	1.95	1.95	-16.60			
Japan (Topix)	1,573.85	-0.33	2.52	0.97	0.97	-8.57			
Emerging Markets									
MSCI EM Index	1,055.06	0.86	-1.33	6.03	6.03	-5.35			
China (SSE Composite)	3,214.13	0.13	-5.00	7.69	7.69	5.38			
India (Sensex)	37,020.14	1.50	1.16	6.03	6.03	-10.26			



What Move the GCC markets , Oil Prices

Oil prices were broadly stable on Sunday in early U.S. trading, as expectations of more economic stimulus programmes balanced concerns about the recovery in fuel demand as coronavirus cases surge and major crude-producing nations ready increases in output.

OPEC+ has been cutting output since May by 9.7 million barrels per day, or 10% of global supply, but from August, cuts will officially taper to 7.7 million bpd until December . **Brent crude futures fell 24 cents to \$43.13 a barrel**

Kuwait Market

The market are closed today down by -1.05%, linked to the downgrade of S&P to Kuwait credit rating to -AA from AA , also the uncertainty of the closer disclosures of companies semiannual financial results and fear of the second wave coronavirus effect of the global economy. **Value traded over 36.3 Million KD.**

Saudi Market

The Market closed flat today by -0.05% , linked to the effect of the re-opining the local economy also the oil performance above 43\$ with the production cuts.

DAILY MARKETS WRAP,

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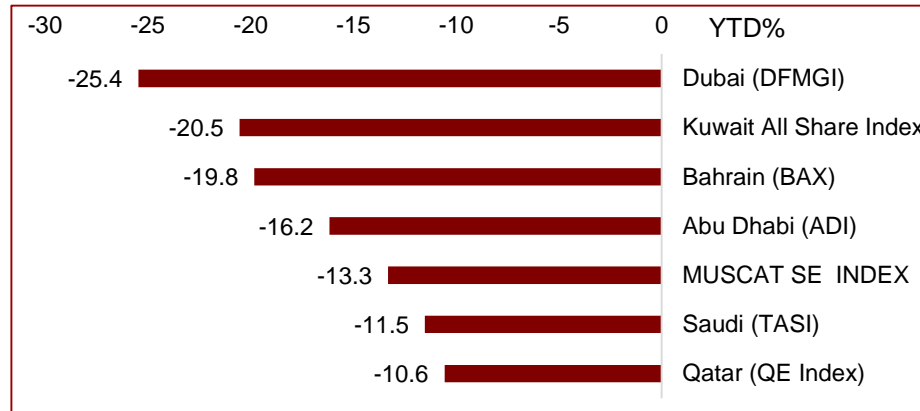
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	0.785	-1.75	-1.75	-4.38	-4.38	-22.97	5.38 KWD	1.38	14.01
KFH	0.586	-0.85	-0.85	-4.25	-4.25	-20.52	4.50 KWD	1.96	18.18
Zain	0.542	-1.28	-1.28	-2.34	-2.34	-9.67	2.35 KWD	1.91	11.68
BOUBYAN BANK	0.524	-1.13	-1.13	-1.50	-1.50	-14.17	1.59 KWD	2.44	26.95
Agility	0.730	-0.41	-0.41	-0.54	-0.54	-10.76	1.29 KWD	1.10	14.50
Saudi Arabia									
ARAMCO	33.15	-0.75	-0.75	2.00	2.00	-5.96	6,679.64 SAR	6.24	21.50
SABIC	87.90	-0.34	-0.34	-0.23	-0.23	-6.39	264.59 SAR	1.58	219.85
STC	95.90	-0.10	-0.10	-3.13	-3.13	-5.80	191.99 SAR	3.05	17.86
AL-RAJHI BANK	57.30	-0.17	-0.17	1.24	1.24	-12.39	143.49 SAR	2.89	14.41
NCB	36.00	0.28	0.28	-3.36	-3.36	-26.90	107.69 SAR	1.68	9.41
United Arab Emirates									
ETISALAT.AD	16.78	0.24	0.24	1.58	1.58	2.45	145.93 AED	3.23	16.81
FAB.AD	10.72	-1.47	-1.47	-4.63	-4.63	-29.29	117.06 AED	1.25	10.53
EMIRATES NBD	8.80	2.92	2.92	-0.68	-0.68	-32.31	55.59 AED	0.70	3.73
DB ISLAMIC BK	3.87	0.52	0.52	1.31	1.31	-29.76	28.02 AED	0.79	5.92
EMAAR PROPERT	2.62	-0.76	-0.76	-4.03	-4.03	-34.83	18.76 AED	0.35	3.05
Qatar									
QNB	18.03	-0.83	-0.83	3.68	3.68	-12.43	166.53 QAR	1.90	11.91
INDUSTRIES QAT	7.85	-0.70	-0.70	3.30	3.30	-22.67	47.49 QAR	1.48	22.73
QA ISLAMIC BK	15.90	1.92	1.92	0.95	0.95	3.72	37.57 QAR	1.85	12.96
MASRAF AL RAYA	3.87	-0.23	-0.23	1.39	1.39	-2.20	29.05 QAR	2.28	13.36
MESAIEED PETRO	2.11	0.29	0.29	4.65	4.65	-15.78	26.46 QAR	1.83	27.27
OMAN									
BANK MUSCAT	0.336	-0.59	-0.59	0.00	0.00	-18.71	1.09 OMR	0.57	6.43
OMANTEL	0.608	-1.95	-1.95	-5.62	-5.62	-1.95	0.45 OMR	0.80	5.95
BANK DHOFAR	0.098	1.03	1.03	-6.67	-6.67	-20.33	0.29 QAR	0.43	18.30
NAT BANK OF OMAN	0.165	0.61	0.61	-5.17	-5.17	-10.33	0.27 QAR	0.51	6.41
OMINVEST	0.340	0.00	0.00	0.00	0.00	3.03	0.27 QAR	0.88	8.59

Summary - Absolute change in Foreign Ownership

	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
8-Jul-20	16.54%	11.82%	0.09%	0.37%	0.35%	3.55%	3.38%	7.50%	3.34%	2.90%
15-Jul-20	16.48%	11.83%	0.09%	0.36%	0.32%	3.53%	3.38%	7.54%	3.34%	2.90%

End of Report

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Leading Sector Performance

Kuwait

The market are down today by -1.05 % The leading sector bottom performance indices today are Real estate -1.55 % Consumer services -1.29 % Telecom -1.2 % respectively

from YTD performance perspective the best sector performance are Consumer goods by 11.56 % while the bottom sector performance is Consumer services by -30.29 %

KFH has a positive price return performance spread over NBK in YTD perspective by +2.45%. Banking sector performance year to date are -24%

KSA

Saudi Armco are have negative performance today by -0.75 %, SABIC have negative performance today by -0.34 %

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

UAE

ETISALAT.AD are up today by +0.24% also less affected by the COVID 19 Crises as telecommunication sectors are outperform and act defensively on this crises.



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