



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

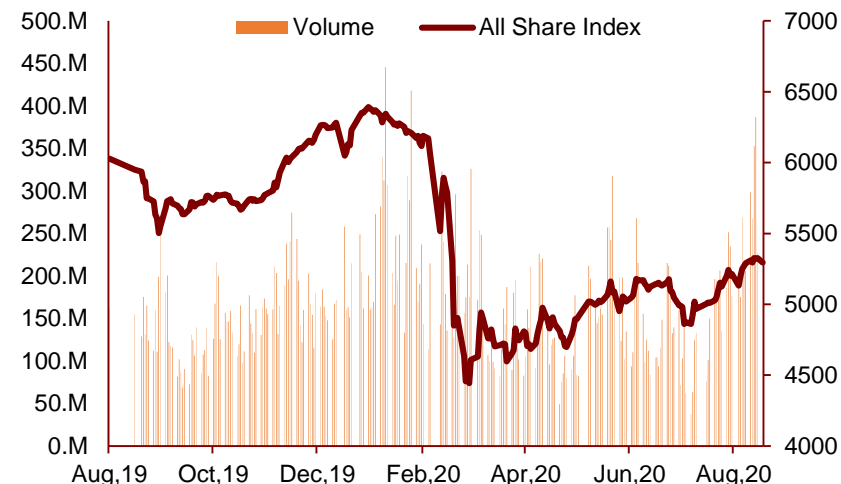
Sunday, September 6, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	5,294.70	-0.59	0.10	0.01	3.20	-15.72	30.66 KWD	1.76	18.21
Kuwait Premier Index	5,815.71	-0.84	-0.84	-0.66	3.72	-16.63	22.44 KWD	1.88	19.61
Kuwait Main Index	4,265.85	0.13	0.13	1.94	1.81	-13.13	8.22 KWD	1.43	14.40
Kuwait Sector									
Banking	1,227.75	-0.73	-0.73	-0.40	5.83	-17.19	18.18 KWD	1.94	19.17
Telecom	1,046.57	-0.70	-0.70	-2.26	0.99	-6.28	3.21 KWD	1.88	12.74
Industrials	774.96	-0.45	-0.45	1.18	-2.67	-16.45	2.77 KWD	1.27	20.49
Financial services	912.68	0.01	0.01	4.26	5.16	-15.61	2.30 KWD	0.94	7.72
Real estate	883.04	-0.23	-0.23	1.09	-1.14	-16.59	1.90 KWD	0.99	22.84
Basic materials	774.49	-0.35	-0.35	-0.78	-5.26	-14.71	0.69 KWD	1.15	18.78
Health care	829.21	0.00	0.00	0.00	1.00	-6.26	0.41 KWD	6.19	52.21
Consumer services	717.31	0.03	0.03	0.11	-7.77	-33.10	0.37 KWD	1.87	12.37
Insurance	971.08	-1.56	-1.56	0.30	1.65	1.80	0.36 KWD	0.84	7.85
Consumer goods	793.31	-1.23	-1.23	-0.26	7.74	24.51	0.24 KWD	1.65	29.66
Oil and Gas	1,082.22	0.14	0.14	-1.29	-0.82	-12.60	0.23 KWD	1.49	9.80
Technology	534.71	7.61	7.61	7.61	8.09	3.81	0.01 KWD	0.60	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	8,024.62	-0.25	-0.25	1.06	11.08	-4.35	9,091 SAR	6.06	26.70
Qatar (QE Index)	9,723.41	-1.15	-1.58	-1.20	8.10	-6.70	515 QAR	1.67	69.87
Dubai (DFMGI)	2,258.55	-1.06	-0.47	0.59	9.36	-18.31	243 AED	31.02	10.78
Abu Dhabi (ADI)	4,522.95	-0.64	-0.27	0.08	5.53	-10.89	675 AED	4.43	14.81
Bahrain (BAX)	1,402.76	-0.53	1.58	1.58	9.80	-12.88	15 BHD	1.47	13.28
MUSCAT SE INDEX	3,706.86	-1.05	-0.81	-1.72	5.43	-6.89	4 OMR	0.76	11.27
Developed Markets									
MSCI World Index	2,399.60	-1.08	-2.33	-2.28	8.98	1.74			
U.S. (S&P 500)	3,426.96	-0.81	-2.31	-2.10	10.54	6.07			
U.K. (FTSE 100)	5,799.08	-0.88	-2.76	-2.76	-6.01	-23.11			
Japan (Topix)	1,616.60	-0.90	0.73	-0.10	3.71	-6.09			
Emerging Markets									
MSCI EM Index	1,099.50	-0.84	-1.97	-0.18	10.49	-1.36			
China (SSE Composite)	3,355.37	-0.87	-1.42	-1.19	12.42	10.01			
India (Sensex)	38,357.18	-1.63	-2.81	-0.70	9.86	-7.02			



What Move the GCC markets , Oil Prices

Oil prices fell more than 3% on Sunday, headed for their biggest weekly decline since June as concern around a slow economic recovery from the COVID-19 pandemic added to worries about weak oil demand.

Prices were pressured by extended declines in the U.S. equities market and by a report showing U.S. job growth slowed further in August as financial assistance from the government ran out. Brent crude, the international benchmark, settled \$1.41, or 3.2%, lower.

Kuwait Market

The market are closed today down by -0.59% , concern around a slow of local economic recovery from the COVID-19 pandemic added to worries about weak oil demand. resurgence of the number of cases and the fear from second wave ,

Saudi Market

The Market closed down today by -0.25% , linked to the slow economic recovery over the globe and resurgence of the number of corona virus cases, and the weak oil demand due to the slow of economic activity and aggregate demand

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



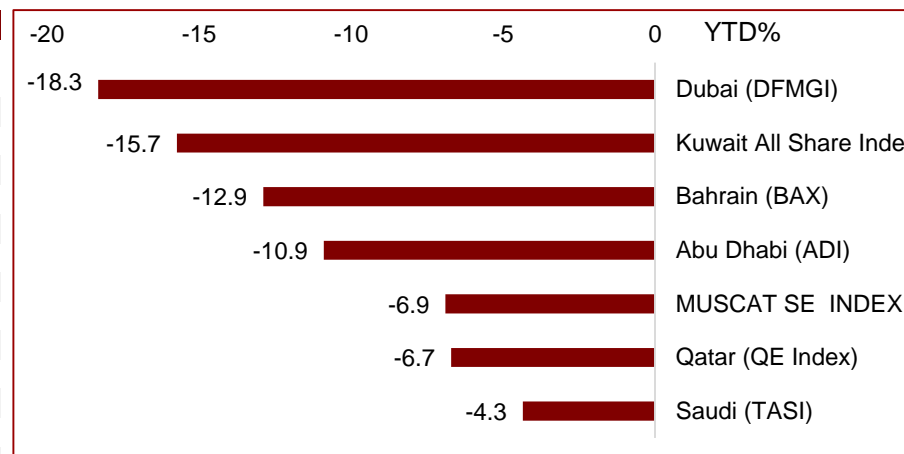
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.852	-1.39	-1.62	-0.93	3.78	-16.39	5.84 KWD	1.64	20.74
KFH	0.623	-0.80	-0.80	-0.48	1.80	-15.50	4.78 KWD	2.54	24.10
Zain	0.571	-1.21	-3.55	-3.22	2.88	-4.83	2.47 KWD	2.01	12.30
BOUBYAN BANK	0.583	-0.17	2.28	0.87	9.59	-4.50	1.77 KWD	3.09	35.18
Agility	0.623	-0.48	-0.32	-0.16	-2.39	-12.41	1.26 KWD	1.07	18.80
Saudi Arabia									
ARAMCO	35.85	-0.42	2.43	0.84	10.31	1.70	7,200.00 SAR	7.02	29.67
SABIC	88.10	-1.89	-0.23	0.11	0.00	-6.18	269.40 SAR	1.65	0.00
STC	97.50	-0.20	1.14	1.56	-1.52	-4.22	195.40 SAR	3.11	18.26
AL-RAJHI BANK	66.00	0.00	0.30	1.69	16.61	0.92	165.00 SAR	3.18	16.46
NCB	36.95	-0.40	-1.60	-0.67	-0.81	-24.97	111.30 SAR	1.52	10.40
United Arab Emirates									
ETISALAT.AD	16.60	-0.72	-0.48	0.48	0.85	1.71	144.37 AED	3.18	16.50
FAB.AD	11.46	-0.87	-0.69	0.17	2.14	-24.27	125.14 AED	1.28	12.05
EMIRATES NBD	10.70	-0.93	-3.60	-0.93	20.77	-17.69	67.59 AED	0.83	6.00
DB ISLAMIC BK	4.25	-0.70	2.66	3.66	11.26	-22.87	30.77 AED	0.84	7.49
EMAAR PROPERT	2.93	-2.01	0.00	1.74	7.33	-27.11	20.98 AED	0.38	4.20
Qatar									
QNB	17.84	-0.89	-2.78	-0.83	2.65	-13.31	164.78 QAR	1.82	12.92
INDUSTRIES QAT	9.88	-2.21	0.12	0.02	28.14	-4.07	59.76 QAR	1.85	38.19
QA ISLAMIC BK	15.89	-0.69	-1.85	-0.69	0.89	3.65	37.55 QAR	1.80	13.26
MASRAF AL RAYA	4.12	-1.39	-1.58	-1.22	7.83	4.02	30.89 QAR	2.32	14.34
MESAIEED PETRO	2.12	-0.98	-1.12	-0.47	4.46	-15.94	26.62 QAR	1.73	26.32
OMAN									
BANK MUSCAT	0.394	-1.52	0.00	-2.51	15.48	-6.13	1.26 OMR	0.65	8.04
OMANTEL	0.620	-0.64	0.65	-1.27	-3.12	0.65	0.47 OMR	0.88	6.83
BANK DHOFAR	0.111	0.00	-0.89	0.00	5.71	-9.76	0.33 QAR	0.49	21.76
NAT BANK OF OMAN	0.175	0.00	0.00	0.56	2.87	-2.72	0.29 QAR	0.55	7.52
OMINVEST	0.330	0.00	0.00	-1.20	-2.94	0.00	0.27 QAR	1.06	6.27

Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
26-Aug-20	16.56%	11.44%	0.07%	0.34%	0.33%	3.57%	3.36%	7.52%	3.42%	2.93%
2-Sep-20	16.63%	11.63%	0.07%	0.33%	0.32%	3.62%	3.45%	7.66%	3.40%	2.93%

End of Report

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Leading Sector Performance

Kuwait

The market are down today by -0.59 % The leading sector bottom performance indices today are Insurance -1.56 % Consumer goods -1.23 % Banking -0.73 % respectively

from YTD performance perspective the best sector performance are Consumer goods by 24.51 % while the bottom sector performance is Consumer services by -33.1 %

Telecommunication sector are down today by -0.7 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 9.44 %

KSA

Saudi Armco are have negative performance today by -0.42 %, SABIC have negative performance today by -1.89 %

STC are have negative performance today by -0.2 %, Al Rajhi Bank flat performance today 0 %

UAE

ETISALAT AD are down today by -0.72%, still outperform the market performance and act defensively with COVID19



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