

شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



## GCC DAILY MARKET WRAP

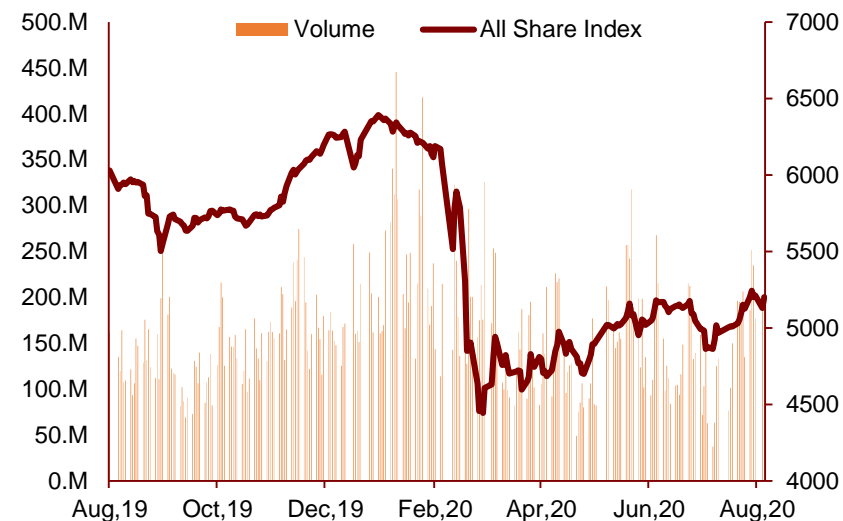
Monday, August 24, 2020



### Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>		%	%	%	%	%			
Kuwait All Share Index	5,201.82	1.38	-0.12	4.58	1.27	-17.29	30.12 KWD	1.71	18.21
Kuwait Premier Index	5,741.56	1.69	-0.13	5.87	2.25	-17.82	22.12 KWD	1.85	18.81
Kuwait Main Index	4,133.78	0.49	-0.08	1.16	-1.35	-15.83	7.99 KWD	1.33	16.53
<b>Kuwait Sector</b>									
Banking	1,203.22	1.71	0.09	7.05	3.71	-18.85	17.78 KWD	1.85	18.96
Telecom	1,064.16	0.40	-0.19	5.35	2.69	-4.70	3.26 KWD	1.91	12.94
Industrials	757.62	0.82	0.07	-2.06	-4.85	-18.32	2.70 KWD	1.24	19.67
Financial services	855.90	1.07	0.75	2.35	-1.38	-20.86	2.20 KWD	0.94	11.07
Real estate	870.39	0.96	-0.83	2.90	-2.56	-17.78	1.87 KWD	1.00	22.02
Basic materials	787.43	1.47	-0.66	2.88	-4.05	-13.62	0.70 KWD	1.15	18.59
Health care	829.21	-1.19	0.00	0.00	1.00	-6.26	0.41 KWD	6.17	52.66
Consumer services	708.62	-0.88	-1.83	-6.17	-8.89	-33.91	0.37 KWD	1.85	10.74
Insurance	959.44	2.51	1.55	2.27	0.43	0.58	0.35 KWD	0.84	7.59
Consumer goods	782.49	1.14	-1.25	8.16	6.27	22.81	0.24 KWD	1.62	28.49
Oil and Gas	1,091.87	-0.32	1.23	-0.31	0.06	-11.82	0.23 KWD	1.60	10.29
Technology	443.78	0.00	0.00	-4.69	-10.29	-13.84	0.01 KWD	0.50	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>		%	%	%	%	%			
Saudi (TASI)	7,957.38	0.70	1.46	6.68	10.15	-5.15	8,691 SAR	5.73	26.06
Qatar (QE Index)	9,890.37	0.83	1.28	5.59	9.93	-5.12	521 QAR	1.71	63.09
Dubai (DFMGI)	2,281.07	2.03	2.03	11.23	10.45	-17.50	246 AED	35.36	10.59
Abu Dhabi (ADI)	4,569.91	0.59	0.59	6.16	6.63	-9.97	689 AED	4.47	14.54
Bahrain (BAX)	1,365.54	0.78	0.75	5.81	6.88	-15.19	15 BHD	1.23	14.74
MUSCAT SE INDEX	3,690.15	1.69	1.68	3.42	4.95	-7.32	4 OMR	0.76	10.74
<b>Developed Markets</b>									
MSCI World Index	2,392.11	0.12	0.00	3.78	8.64	1.43			
U.S. (S&P 500)	3,397.16	0.00	0.72	3.85	9.58	5.15			
U.K. (FTSE 100)	6,110.16	1.80	1.80	3.60	-0.97	-18.99			
Japan (Topix)	1,607.13	0.19	0.19	7.42	3.10	-6.64			
<b>Emerging Markets</b>									
MSCI EM Index	1,091.85	1.05	0.00	1.20	9.72	-2.05			
China (SSE Composite)	3,385.64	0.15	0.15	2.28	13.43	11.00			
India (Sensex)	38,799.08	0.95	0.95	3.17	11.12	-5.95			



### What Move the GCC markets ,

#### Oil Prices

Crude oil prices nudged higher on Monday as storms bore down on the Gulf of Mexico, shutting more than half the region's oil production, although gains were capped by ongoing concerns about demand from coronavirus lockdowns.

OPEC said in a monthly report that world oil demand will fall by 9.06 million bpd this year, more than the 8.95 million bpd decline expected a month ago. **Brent crude oil futures added 33 cents, or 0.7%, to \$44.68 a barrel**

#### Kuwait Market

The market are closed today up by +1.38% due to 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 also new companies traded and the expected positive effect to the market liquidity.

#### Saudi Market

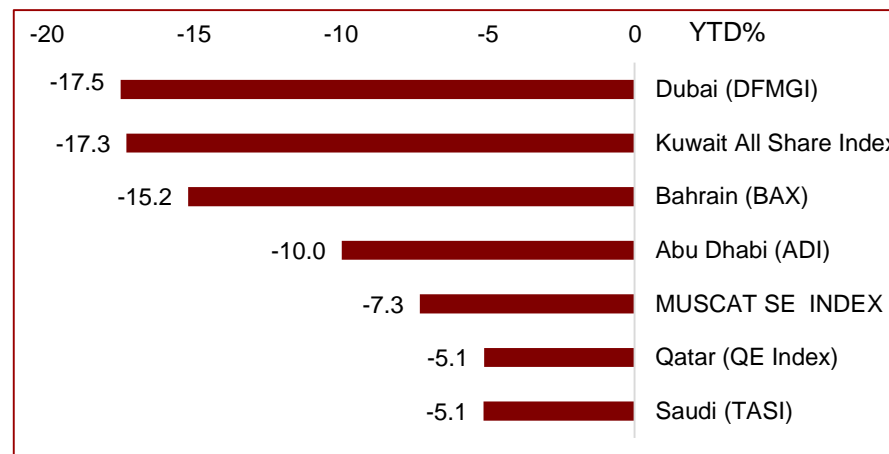
The Market closed up today by +0.70% , linked to the effect of the re-opening the local economy also the oil performance above 44\$ with the production cuts.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	0.833	1.71	-0.24	5.20	1.10	-18.55	5.71 KWD	1.61	19.66
KFH	0.617	1.65	-0.32	6.40	0.49	-16.58	4.73 KWD	2.51	23.29
Zain	0.586	0.34	-0.68	6.55	5.59	-2.33	2.54 KWD	2.07	12.43
BOUBYAN BANK	0.556	1.09	-1.07	4.90	4.70	-8.76	1.68 KWD	2.95	33.13
Agility	0.618	1.64	0.32	-3.28	-3.02	-12.98	1.25 KWD	1.06	18.26
<b>Saudi Arabia</b>									
ARAMCO	34.90	2.35	2.20	5.76	7.38	-0.99	6,820.36 SAR	6.65	28.14
SABIC	88.50	-0.23	0.11	-0.45	0.45	-5.75	266.11 SAR	1.63	0.00
STC	96.70	0.00	0.10	-0.51	-2.32	-5.01	193.41 SAR	3.07	18.05
AL-RAJHI BANK	65.80	1.08	1.39	11.71	16.25	0.61	162.76 SAR	3.13	16.56
NCB	38.75	-0.77	0.39	6.75	4.03	-21.32	117.16 SAR	1.60	10.82
<b>United Arab Emirates</b>									
ETISALAT.AD	16.94	0.00	0.00	1.80	2.67	3.55	147.32 AED	3.25	16.71
FAB.AD	11.50	0.88	0.18	4.58	1.60	-24.67	125.58 AED	1.29	11.88
EMIRATES NBD	11.30	6.10	6.10	27.83	27.54	-13.08	71.38 AED	0.88	5.92
DB ISLAMIC BK	4.12	1.48	1.48	9.28	7.85	-25.23	29.83 AED	0.82	7.11
EMAAR PROPERT	2.96	1.72	1.72	15.18	8.42	-26.37	21.19 AED	0.38	4.09
<b>Qatar</b>									
QNB	18.30	-0.76	-1.14	1.61	5.18	-11.17	169.03 QAR	1.86	13.23
INDUSTRIES QAT	10.10	7.44	12.21	29.16	31.24	-1.75	61.11 QAR	1.89	35.54
QA ISLAMIC BK	16.10	-0.43	-0.19	0.12	2.35	5.15	38.04 QAR	1.83	13.40
MASRAF AL RAYA	4.15	0.70	-0.70	4.65	7.88	4.07	31.11 QAR	2.34	14.14
MESAIEED PETRO	2.14	1.28	-0.09	1.77	5.05	-15.46	26.86 QAR	1.74	25.97
<b>OMAN</b>									
BANK MUSCAT	0.400	2.62	1.55	12.00	16.67	-5.16	1.27 OMR	0.65	7.80
OMANTEL	0.616	0.00	0.00	0.66	-4.37	-0.65	0.46 OMR	0.87	6.70
BANK DHOFAR	0.105	1.94	-6.25	5.00	0.00	-14.63	0.31 QAR	0.46	20.20
NAT BANK OF OMAN	0.180	1.12	0.56	6.51	3.45	-2.17	0.29 QAR	0.55	7.48
OMINVEST	0.338	0.00	0.00	-1.74	-0.59	2.42	0.27 QAR	1.09	6.43



### Leading Sector Performance

#### Kuwait

The market are up today by + 1.38 % The leading sector best performance indices today are Insurance 2.51 % Banking 1.71 % Basic materials 1.47 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 22.81 % while the bottom sector performance is Consumer services by -33.91 %

Telecommunication sector are up today by + 0.4 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 12.59 %

#### KSA

Saudi Armco are have positive performance today by + 2.35 %, SABIC have negative performance today by -0.23 %

STC are flat performance today 0 %, Al Rajhi Bank have positive performance today by + 1.08 %

UAE  
ETISALAT AD are down today by -0.24% , still outperform the market performance and act defensively with COVID19

### Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
12-Aug-20	16.54%	11.44%	0.07%	0.35%	0.33%	3.57%	3.35%	7.52%	3.45%	2.92%
19-Aug-20	16.56%	11.38%	0.07%	0.34%	0.33%	3.58%	3.34%	7.52%	3.43%	2.92%

### End of Report

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