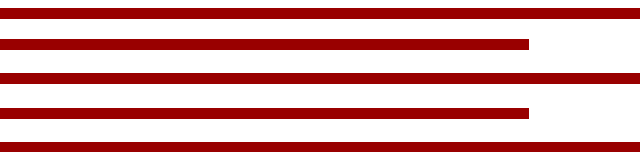


شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



## GCC DAILY MARKET WRAP

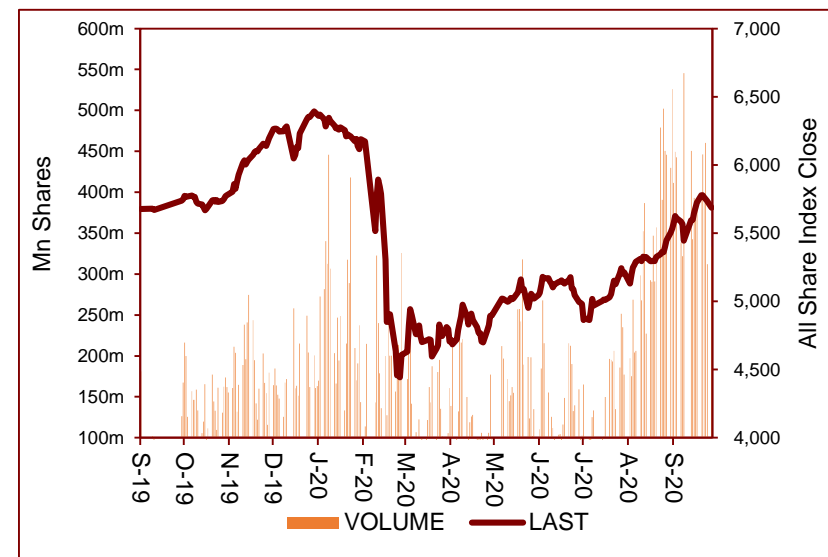
Tuesday, October 20, 2020



### Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>		%	%	%	%	%			
Kuwait All Share Index	5,629.11	0.35	-1.85	3.38	3.38	-10.40	33.01 KWD	1.94	19.10
Kuwait Premier Index	6,245.02	0.42	-2.08	3.72	3.72	-10.48	24.44 KWD	2.07	20.98
Kuwait Main Index	4,405.37	0.16	-1.17	2.37	2.37	-10.29	8.57 KWD	1.57	13.75
NIC 50	6,918.20	0.53	-2.13	3.65	3.65	-7.24	28.60 KWD	1.57	15.56
<b>Kuwait Sector</b>									
Banking	1,317.02	0.50	-2.01	3.58	3.58	-11.17	19.74 KWD	2.18	20.59
Telecom	1,095.72	0.23	-1.93	4.23	4.23	-1.88	3.42 KWD	2.00	13.52
Industrials	833.46	0.00	-1.58	4.47	4.47	-10.14	3.02 KWD	1.40	21.69
Financial services	954.88	0.39	-0.79	5.36	5.36	-11.71	2.40 KWD	0.94	7.06
Real estate	932.40	-0.38	-3.29	-1.28	-1.28	-11.93	2.03 KWD	1.09	20.77
Basic materials	818.48	0.33	-2.00	5.30	5.30	-9.87	0.74 KWD	1.23	19.42
Health care	821.04	0.00	0.00	0.11	0.11	-7.18	0.41 KWD	6.22	52.00
Consumer services	744.90	0.17	-1.86	0.56	0.56	-30.53	0.39 KWD	1.86	13.92
Insurance	988.15	-0.09	-1.34	-5.72	-5.72	3.59	0.37 KWD	0.87	7.99
Consumer goods	763.85	0.03	-0.46	-0.35	-0.35	19.88	0.23 KWD	1.57	27.99
Oil and Gas	1,176.82	0.00	-1.16	3.52	3.52	-4.96	0.25 KWD	1.78	10.88
Technology	516.53	-0.56	-0.56	0.85	0.85	0.28	0.01 KWD	0.58	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>		%	%	%	%	%			
Saudi (TASI)	8,533.00	-0.17	-0.24	2.82	2.82	1.71	9,210 SAR	6.00	26.61
Qatar (QE Index)	10,015.52	0.16	0.36	0.45	0.45	-3.74	541 QAR	1.70	12.50
Dubai (DFMGI)	2,180.81	-1.27	-0.63	-4.08	-4.08	-21.12	236 AED	1.25	10.63
Abu Dhabi (ADI)	4,542.63	-0.37	-0.26	0.54	0.54	-10.50	682 AED	4.60	15.55
Bahrain (BAX)	1,454.61	-0.44	-1.57	1.40	1.40	-9.66	16 BHD	1.83	13.50
MUSCAT SE INDEX	3,586.98	-0.04	-0.18	-0.77	-0.77	-9.90	4 OMR	0.75	11.38
<b>Developed Markets</b>									
MSCI World Index	2,417.69	-0.92	-0.92	2.13	2.13	2.51			
U.S. (S&P 500)	3,426.92	0.00	-1.63	1.90	1.90	6.07			
U.K. (FTSE 100)	5,894.29	0.16	-0.43	0.48	0.48	-21.85			
Japan (Topix)	1,625.74	-0.75	0.50	0.02	0.02	-5.55			
<b>Emerging Markets</b>									
MSCI EM Index	1,127.28	0.28	0.28	4.19	4.19	1.13			
China (SSE Composite)	3,328.10	0.47	-0.25	3.42	3.42	9.11			
India (Sensex)	40,544.37	0.28	1.42	6.52	6.52	-1.70			



### What Move the GCC markets ,

#### Oil Prices

Oil prices slipped for a fourth straight day on Tuesday on worries a resurgence of coronavirus cases globally is stifling a promising recovery in fuel demand, while growing output from Libya adds to plentiful supply. **Brent crude futures fell 13 cents, or 0.3%, to \$42.49 a barrel.**

#### Kuwait Market

The market are closed today up by +0.35%, with re-opening the local economy , MSCI liquidity expectation, while Coronavirus concerns continue to weigh on sentiment too as infections surge in the region. Coronavirus restrictions are returning across Europe, increased uncertainty over the outlook for economic growth.

#### Saudi Market

The Market closed today down by -0.17% and turn positive YTD performance leading all GCC markets , today market flat are linked to the slow economic recovery over the globe and fear form the Covid19 second wave and oil prices over \$42 a barrel.



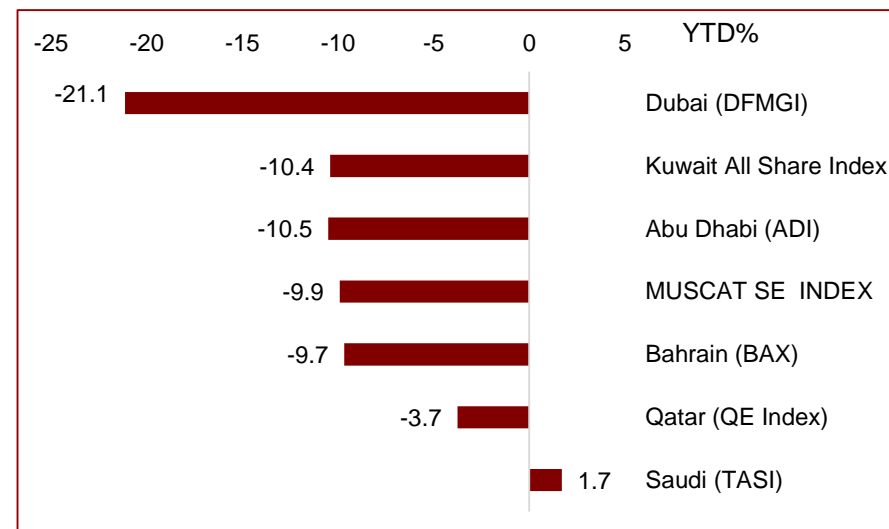
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	0.881	0.34	-1.01	1.26	1.26	-13.55	6.09 KWD	1.72	21.34
KFH	0.692	0.73	-2.26	4.69	4.69	-6.14	5.35 KWD	2.88	26.75
Zain	0.602	0.17	-2.27	4.88	4.88	0.33	2.66 KWD	2.17	13.06
BOUBYAN BANK	0.622	-0.16	-2.35	4.54	4.54	1.89	1.89 KWD	3.38	37.53
Agility	0.680	-0.58	-2.16	3.50	3.50	-4.40	1.41 KWD	1.20	20.85
<b>Saudi Arabia</b>									
ARAMCO	35.50	-0.42	-0.84	-1.11	-1.11	0.71	7,169.81 SAR	6.98	29.50
SABIC	96.50	-0.52	0.42	9.16	9.16	2.77	291.29 SAR	1.76	0.00
STC	103.40	-0.96	-0.58	2.99	2.99	1.57	206.79 SAR	3.31	19.43
AL-RAJHI BANK	66.70	-0.15	-0.30	1.52	1.52	1.99	167.50 SAR	3.22	17.07
NCB	40.30	-0.49	-3.12	8.48	8.48	-18.17	123.15 SAR	1.70	11.66
<b>United Arab Emirates</b>									
ETISALAT.AD	16.94	0.36	0.24	1.68	1.68	3.55	146.63 AED	3.24	16.63
FAB.AD	11.16	-0.71	-0.18	-0.36	-0.36	-26.12	122.30 AED	1.25	11.68
EMIRATES NBD	9.73	-3.18	-3.18	-8.64	-8.64	-25.15	63.48 AED	0.78	5.58
DB ISLAMIC BK	4.10	-1.68	-1.20	-5.09	-5.09	-25.59	29.69 AED	0.82	7.18
EMAAR PROPERT	2.65	-0.38	0.76	-5.02	-5.02	-34.08	18.69 AED	0.34	3.67
<b>Qatar</b>									
QNB	17.71	-0.23	-0.67	-2.31	-2.31	-13.65	164.00 QAR	1.78	13.80
INDUSTRIES QAT	9.71	0.00	-1.42	-1.52	-1.52	-5.64	59.44 QAR	1.84	37.77
QA ISLAMIC BK	16.58	0.18	0.73	0.55	0.55	8.22	38.98 QAR	1.80	13.66
MASRAF AL RAYA	4.18	0.34	-0.12	0.24	0.24	5.30	31.25 QAR	2.25	14.28
MESAEIED PETRO	2.10	-0.29	0.24	1.01	1.01	-16.33	26.26 QAR	1.71	26.13
<b>OMAN</b>									
BANK MUSCAT	0.368	-0.54	-1.08	2.79	2.79	-10.97	1.20 OMR	0.62	7.55
OMANTEL	0.620	0.00	0.00	-1.90	-1.90	0.65	0.46 OMR	0.88	6.79
BANK DHOFAR	0.109	0.00	5.83	3.81	3.81	-11.38	0.32 QAR	0.45	20.98
NAT BANK OF OMAN	0.165	0.00	-2.37	0.00	0.00	-10.33	0.27 QAR	0.52	7.10
OMINVEST	0.326	-0.63	-3.05	-3.64	-3.64	-3.64	0.26 QAR	1.05	6.12

### Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
7-Oct-20	16.89%	12.21%	0.06%	0.19%	0.31%	3.62%	3.64%	8.01%	3.70%	2.96%
14-Oct-20	16.93%	12.38%	0.06%	0.12%	0.31%	3.59%	3.73%	8.14%	3.80%	2.96%

### End of Report

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document is confidential and may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed and others authorized to receive it.



### Leading Sector Performance

The market are up today by + 0.35 % The leading sector best performance indices today are Banking 0.5 % Financial services 0.39 % Basic materials 0.33 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 19.88 % while the bottom sector performance is Consumer services by -30.53 %.

Telecommunication sector are up today by + 0.23 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 8.52 %.

### KSA

Saudi Armco are have negative performance today by -0.42 %, SABIC have negative performance today by -0.52 %.

STC are have negative performance today by -0.96 %, Al Rajhi Bank have negative performance today by -0.15 %.

### UAE

ETISALAT AD up by +0.36%, still outperform the market performance in year to date basis and act defensively with COVID19



شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | [www.nic.com.kw](http://www.nic.com.kw)