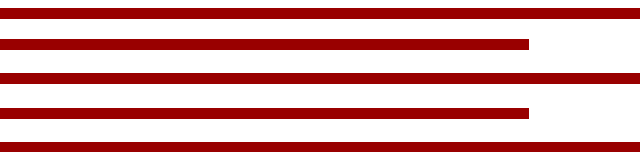


شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



## GCC DAILY MARKET WRAP

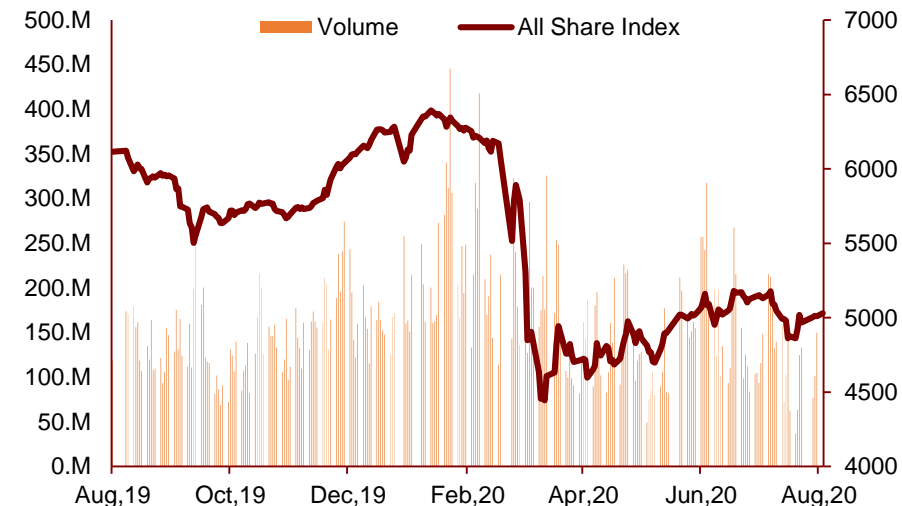
Sunday, August 9, 2020



### Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>		%	%	%	%	%			
Kuwait All Share Index	5,029.15	0.39	1.23	1.23	-1.98	-19.95	28.96 KWD	1.58	17.32
Kuwait Permier Index	5,511.89	0.51	0.51	1.78	-1.70	-20.99	21.09 KWD	1.70	18.14
Kuwait Main Index	4,075.27	0.06	0.06	-0.26	-2.74	-17.01	7.87 KWD	1.26	15.11
<b>Kuwait Sector</b>									
Banking	1,144.90	0.57	0.57	1.86	-1.32	-22.78	16.84 KWD	1.67	18.70
Telecom	1,022.43	0.53	0.53	1.22	-1.33	-8.44	3.12 KWD	1.82	12.50
Industrials	770.11	-0.40	-0.40	-0.45	-3.28	-16.97	2.76 KWD	1.25	16.94
Financial services	821.55	-0.73	-0.73	-1.76	-5.34	-24.03	2.12 KWD	0.81	11.66
Real estate	856.88	-0.30	-0.30	1.30	-4.07	-19.06	1.85 KWD	0.97	16.42
Basic materials	782.15	1.97	1.97	2.58	-4.33	-13.87	0.68 KWD	1.11	16.50
Health care	839.19	0.00	0.00	0.00	2.21	-5.13	0.42 KWD	6.29	47.76
Consumer services	745.05	0.10	0.10	-1.35	-4.20	-30.52	0.39 KWD	1.42	7.87
Insurance	970.74	0.82	0.82	3.47	1.61	1.77	0.35 KWD	0.84	8.07
Consumer goods	736.68	1.31	1.31	1.83	0.05	15.62	0.22 KWD	1.55	31.58
Oil and Gas	1,105.54	5.92	5.92	0.94	1.32	-10.71	0.22 KWD	1.45	8.67
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
<b>GCC Markets</b>		%	%	%	%	%			
Saudi (TASI)	7,530.31	0.40	0.40	0.95	4.24	-10.24	8,374 SAR	5.33	20.63
Qatar (QE Index)	9,398.90	-0.14	0.24	0.24	4.35	-9.93	498 QAR	1.64	32.98
Dubai (DFMGI)	2,093.63	-0.66	2.09	2.09	1.37	-24.28	227 AED	0.98	8.89
Abu Dhabi (ADI)	4,331.49	-0.64	0.62	0.62	1.07	-14.66	643 AED	4.47	19.24
Bahrain (BAX)	1,292.91	0.32	0.18	0.18	1.20	-19.70	14 BHD	1.04	16.48
MUSCAT SE INDEX	3,587.35	0.54	0.65	2.02	2.02	-9.90	4 OMR	0.00	10.79
<b>Developed Markets</b>									
MSCI World Index	2,355.97	-0.17	2.21	2.21	7.00	-0.11			
U.S. (S&P 500)	3,351.28	0.06	2.45	2.45	8.10	3.73			
U.K. (FTSE 100)	6,032.18	0.09	2.28	2.28	-2.23	-20.02			
Japan (Topix)	1,546.74	-0.20	3.39	3.39	-0.77	-10.14			
<b>Emerging Markets</b>									
MSCI EM Index	1,089.32	-1.56	0.96	0.96	9.47	-2.27			
China (SSE Composite)	3,354.04	-0.96	1.33	1.33	12.38	9.96			
India (Sensex)	38,040.57	0.04	1.15	1.15	8.95	-7.79			



### What Move the GCC markets , Oil Prices

Oil prices fell more than 1% on Sunday, limiting their weekly gain due to concerns the global recovery could falter from a resurgence of coronavirus cases.

The rise in infections remains the dominant issue for the fuel demand outlook. Cases in the United States are still rising in a number of states, while India recently reported a record daily jump in infections. **Brent crude fell 78 cents, or 1.7%, to \$44.31 a barrel**

### Kuwait Market

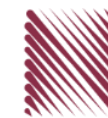
The market are closed today up by +0.39%, the hope of re- opening the local economy and the effect of demand recovery and production cut effect on the oil prices also the positive effect on inflows from MSCI in Nov 2020 . **Value traded over 17.6 Million KD.**

### Saudi Market

The Market closed up today by +0.40% , 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



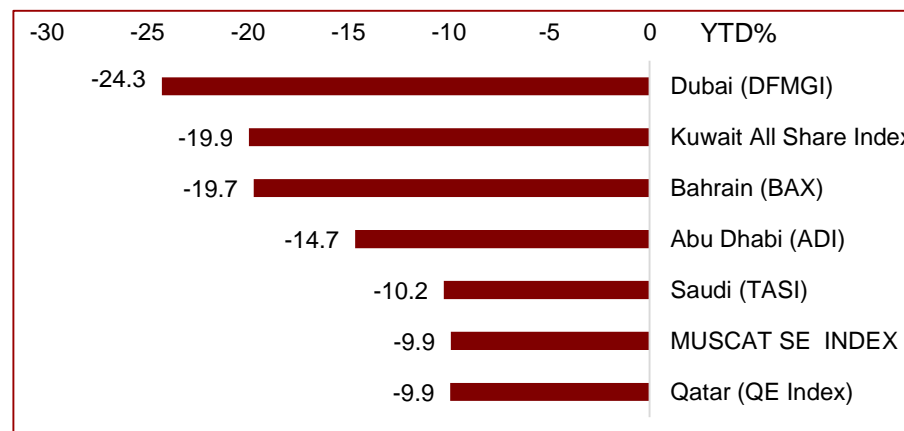
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	0.793	0.25	0.51	0.51	-3.41	-22.18	5.42 KWD	1.53	18.99
KFH	0.593	0.85	2.60	2.60	-3.10	-19.57	4.51 KWD	2.17	22.56
Zain	0.558	0.72	1.45	1.45	0.54	-7.00	2.40 KWD	1.95	11.79
BOUBYAN BANK	0.538	0.00	1.32	1.32	1.13	-11.87	1.63 KWD	2.85	32.41
Agility	0.641	-0.47	0.16	0.16	0.43	-9.88	1.30 KWD	1.12	14.65
<b>Saudi Arabia</b>									
ARAMCO	33.05	0.30	0.15	0.15	1.69	-6.24	6,587.89 SAR	6.16	21.24
SABIC	87.70	-0.11	-1.35	-1.35	-0.45	-6.60	263.32 SAR	1.58	0.00
STC	96.70	-0.31	-0.51	-0.51	-2.32	-5.01	193.94 SAR	3.08	17.94
AL-RAJHI BANK	60.00	0.84	1.87	1.87	6.01	-8.26	148.70 SAR	2.86	15.03
NCB	36.70	0.00	1.10	1.10	-1.48	-25.48	110.06 SAR	1.71	10.09
<b>United Arab Emirates</b>									
ETISALAT.AD	16.60	-0.48	-0.60	-0.60	0.24	1.10	145.06 AED	3.20	16.46
FAB.AD	11.00	-1.08	0.92	0.92	-1.96	-27.31	121.43 AED	1.24	11.59
EMIRATES NBD	9.25	-1.07	4.64	4.64	4.40	-28.85	59.06 AED	0.73	5.20
DB ISLAMIC BK	3.81	-0.78	1.06	1.06	-0.26	-30.85	27.80 AED	0.76	6.72
EMAAR PROPERT	2.66	-1.12	3.50	3.50	-2.56	-33.83	19.26 AED	0.36	3.11
<b>Qatar</b>									
QNB	18.09	-0.50	0.28	0.28	3.80	-12.34	167.57 QAR	1.85	13.04
INDUSTRIES QAT	8.03	-0.25	2.69	2.69	4.34	-21.89	48.60 QAR	1.51	30.43
QA ISLAMIC BK	16.10	-0.43	-0.06	-0.06	2.16	4.96	38.13 QAR	1.84	13.40
MASRAF AL RAYA	3.93	-0.20	0.05	0.05	3.14	-0.51	29.47 QAR	2.22	13.52
MESAIEED PETRO	2.07	-0.34	-0.62	-0.62	2.57	-17.45	26.08 QAR	1.81	27.01
<b>OMAN</b>									
BANK MUSCAT	0.360	2.87	3.45	7.14	7.14	-12.90	1.13 OMR	0.57	7.10
OMANTEL	0.616	0.65	1.32	-3.75	-3.75	0.00	0.46 OMR	0.83	6.70
BANK DHOFAR	0.101	0.00	1.00	1.00	-3.81	-17.89	0.30 QAR	0.46	19.80
NAT BANK OF OMAN	0.170	0.00	0.00	0.00	-2.87	-8.15	0.27 QAR	0.51	7.10
OMINVEST	0.344	0.00	0.00	0.00	1.18	4.24	0.28 QAR	0.89	8.69

### Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	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 +0.39 % The leading sector best performance indices today are Oil and Gas 5.92 % Basic materials 1.97 % Consumer goods 1.31 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 15.62 % while the bottom sector performance is Consumer services by -30.52 %

Telecommunication sector are up today by +0.53 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by +11.51 %

#### KSA

Saudi Armco are have positive performance today by +0.3 %, SABIC have negative performance today by -0.11 %

STC are have negative performance today by -0.31 %, Al Rajhi Bank have positive performance today by +0.84 %

#### UAE

ETISALAT AD are down today by -0.48% , still outperform the market performance and act defensively with COVID19



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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)