

Daily Markets Wrap,

NIC Research and Studies Dep - June 30, 2020

Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,130.72	-0.27	-0.72	2.70	6.39	-18.33	29.81 KWD	1.52	15.28
Kuwait Permier Index	5,607.07	-0.24	-0.88	3.37	7.86	-19.62	21.67 KWD	1.62	15.40
Kuwait Main Index	4,190.08	-0.36	-0.28	0.96	2.62	-14.67	8.13 KWD	1.27	14.96
Kuwait Sector									
Banking	1,160.16	-0.26	-0.78	1.86	4.72	-21.75	17.26 KWD	1.57	15.81
Telecom	1,036.26	0.09	-1.10	4.27	7.25	-7.20	3.17 KWD	1.73	10.98
Industrials	796.25	-0.25	-0.80	7.76	17.01	-14.15	2.85 KWD	1.34	16.02
Financial services	867.92	-0.40	-0.34	-2.14	2.95	-19.75	2.23 KWD	0.86	12.39
Real estate	893.26	-0.55	-0.05	5.41	6.77	-15.62	1.93 KWD	0.97	13.26
Basic materials	817.53	-0.12	0.30	9.16	28.49	-9.97	0.73 KWD	1.19	18.27
Health care	821.04	-0.91	-0.91	-2.34	-3.55	-7.18	0.41 KWD	6.42	47.23
Consumer services	777.74	-0.67	-0.75	5.87	7.52	-27.47	0.41 KWD	1.58	9.10
Insurance	955.34	-1.43	-1.78	0.34	-0.37	0.15	0.36 KWD	0.82	8.36
Consumer goods	736.33	-0.66	-0.58	1.38	17.88	15.56	0.23 KWD	1.57	32.21
Oil and Gas	1,091.19	0.88	0.41	5.55	-0.55	-11.87	0.23 KWD	1.56	8.92
Technology	494.70	0.00	-0.44	3.82	11.47	-3.95	0.01 KWD	0.53	0.00

What Move the GCC markets , Oil Prices

Oil prices fell on Tuesday as optimism for a straightforward recovery in fuel demand faded and a looming increase in supply weighed on the market, with Libya's state oil company flagging progress on talks to resume exports.

coronavirus cases continue to rise in southern and southwestern U.S. states.

Brent crude futures fell 17 cents, or 0.2%, to \$41.68 a barrel.

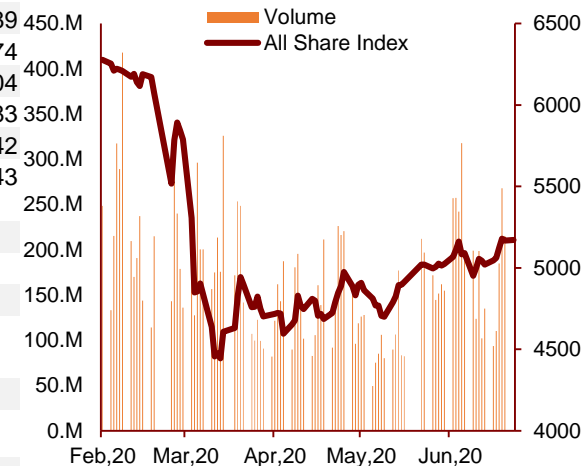
Kuwait Market

The market are closed today down by -0.27%, affected by the two forces of hope in gradual re-opening the local economy and Worries about a second wave of Covid-19 cases in all over the globe . *Value traded over 18 Million KD.*

Saudi Market

The Market closed down today by -0.87% ,the performance are linked by the fear of second wave coronavirus and the effect of global demand .

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	7,224.09	-0.87	-0.11	0.15	11.05	-13.89	8,276 SAR	5.28	28.89
Qatar (QE Index)	8,998.56	-0.59	-1.39	2.40	10.36	-13.12	473 QAR	1.62	24.74
Dubai (DFMGI)	2,065.28	-0.74	-1.02	6.18	16.60	-25.30	223 AED	0.96	8.04
Abu Dhabi (ADI)	4,285.80	0.24	0.00	3.48	14.76	-15.56	485 AED	4.01	22.83
Bahrain (BAX)	1,277.61	-0.01	-0.14	0.63	-5.41	-20.65	13 BHD	0.94	16.42
MUSCAT SE INDEX	3,516.00	-0.13	-0.35	-0.87	1.89	-11.74	4 OMR	0.74	9.43
Developed Markets									
MSCI World Index	2,176.44	0.89	0.89	1.33	17.47	-7.72			
U.S. (S&P 500)	3,053.24	1.47	1.47	0.29	18.13	-5.50			
U.K. (FTSE 100)	6,180.88	-0.72	0.35	1.72	8.97	-18.05			
Japan (Topix)	1,558.77	0.62	-1.18	-0.31	11.10	-9.45			
Emerging Markets									
MSCI EM Index	993.96	-0.49	-0.49	6.84	17.13	-10.83			
China (SSE Composite)	2,984.67	0.78	0.17	4.64	8.52	-2.15			
India (Sensex)	34,915.80	-0.13	-0.70	7.72	18.52	-15.34			



Notes

PBV is calculated by the last closing price divided by the latest fiscal period total equity per share and PBV for the index its calculated on the weighted average scaled by market cap , also PE are market cap weighted average.

Sources : Reuters , NIC

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.821	-0.12	-0.73	6.49	14.03	-19.43	5.63 KWD	1.44	14.41
KFH	0.612	-0.16	-0.97	-0.65	6.52	-16.99	4.70 KWD	2.05	18.85
Zain	0.555	0.00	-1.60	4.72	7.56	-7.50	2.40 KWD	1.85	11.07
BOUBYAN BANK	0.532	0.38	-0.19	4.72	9.32	-12.85	1.61 KWD	2.47	26.95
Agility	0.734	-0.14	-1.08	11.21	29.00	-10.27	1.30 KWD	1.11	14.54
Saudi Arabia									
ARAMCO	32.50	-0.46	-0.61	-1.52	7.79	-7.80	6,528.61 SAR	6.10	20.96
SABIC	88.10	-0.79	0.46	2.68	25.86	-6.18	266.34 SAR	1.60	218.10
STC	99.00	0.20	0.10	-0.50	13.14	-2.75	197.56 SAR	3.14	18.21
AL-RAJHI BANK	56.60	-1.05	-2.08	-1.91	5.20	-13.46	142.97 SAR	2.88	14.53
NCB	37.25	-0.27	0.00	-6.87	7.35	-24.37	112.03 SAR	1.74	10.21
United Arab Emirates									
ETISALAT.AD	16.50	-0.96	-1.67	4.96	17.69	0.86	144.89 AED	3.21	16.73
FAB.AD	11.24	1.81	0.18	-0.72	14.61	-27.04	120.56 AED	1.29	10.68
EMIRATES NBD	8.86	0.00	-0.45	3.50	22.55	-31.85	55.97 AED	0.71	3.86
DB ISLAMIC BK	3.82	-1.04	-1.55	9.46	6.11	-30.67	27.95 AED	0.79	5.94
EMAAR PROPERT	2.73	-2.15	-1.80	8.76	22.97	-32.09	19.98 AED	0.37	3.22
Qatar									
QNB	17.39	-1.25	-2.44	2.39	4.52	-14.72	162.60 QAR	1.85	11.53
INDUSTRIES QAT	7.70	0.08	-4.10	-1.15	15.94	-25.00	46.51 QAR	1.45	22.11
QA ISLAMIC BK	15.75	-0.94	-1.74	4.01	10.31	3.33	37.56 QAR	1.85	13.17
MASRAF AL RAYA	3.82	-1.19	-0.31	-0.31	5.68	-2.32	28.99 QAR	2.28	13.29
MESAIEED PETRO	2.02	-1.75	-2.33	2.04	40.48	-18.29	25.82 QAR	1.79	26.70
OMAN									
BANK MUSCAT	0.336	0.59	-0.58	-1.73	6.25	-17.74	1.10 OMR	0.58	6.43
OMANTEL	0.640	0.00	-1.23	0.00	9.22	3.90	0.48 OMR	0.85	6.18
BANK DHOFAR	0.105	0.00	0.00	0.96	16.67	-14.63	0.32 QAR	0.46	19.81
NAT BANK OF OMAN	0.174	0.00	2.35	12.26	8.75	-5.43	0.28 QAR	0.54	6.80
OMINVEST	0.340	-2.86	-2.86	0.00	6.25	3.03	0.28 QAR	0.91	8.84

Leading Sector Performance

Kuwait

The market are down by -0.27% today. The leading sector negative performance indices today is Industrial , Health Care and Consumer goods sector by -1.43% , -0.91% and -0.66% respectively.

Telecommunication sector are flat today by 0.09% and act defensively in Covid 19 and outperform Kuwait market index in YTD perspective by +11.13%.

Consumer goods are the best performance sector have YTD positive performance by +15.56%, the performance are linked to COVID 19 effect.

KFH has a positive price return performance spread over NBK in YTD perspective by +2.44%.

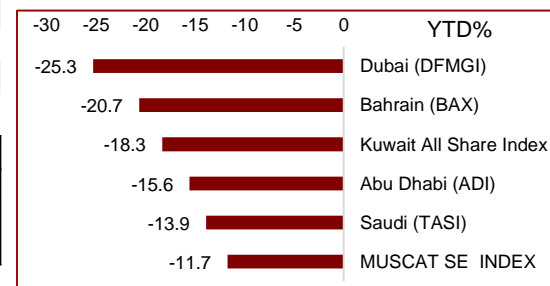
KSA

Saudi Aramco in negative performance today -0.46% and SABIC have negative performance by -0.79% compared to yesterday close .

STC also have positive performance today by +0.2% and still less affected by the COVID 19 Crises as telecommunication sectors are outperform,

UAE

ETISALAT.AD are down by -0.96% today also less affected by the COVID 19 Crises as telecommunication sectors are outperform and act defensively on this crises.



Summary - Absolute change in Foreign Ownership

	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
17-Jun-20	16.46%	11.76%	0.09%	0.37%	0.34%	3.72%	3.34%	7.41%	3.28%	2.90%
24-Jun-20	16.45%	11.83%	0.09%	0.37%	0.35%	3.56%	3.37%	7.42%	3.27%	2.90%

End of Report

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