

شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



## GCC DAILY MARKET WRAP

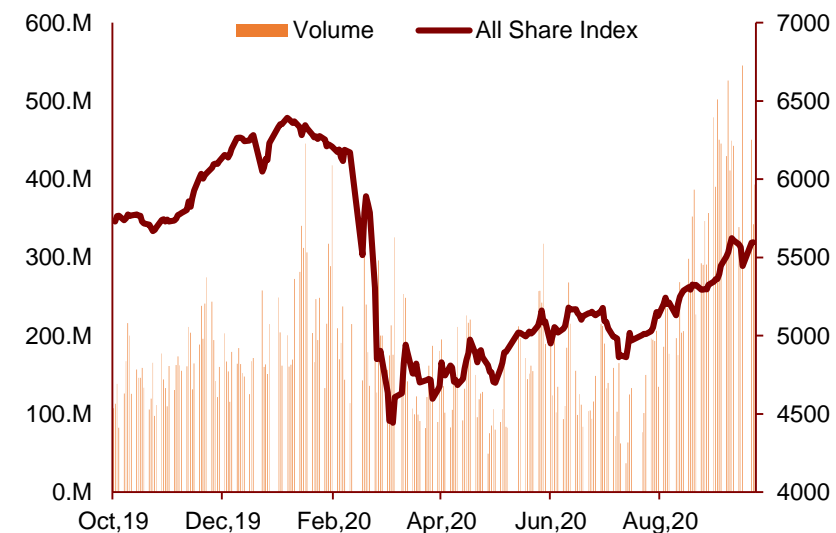
Tuesday, October 6, 2020



### Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>		%	%	%	%	%			
Kuwait All Share Index	5,645.54	0.86	3.68	3.68	3.68	-10.14	32.39 KWD	1.88	18.90
Kuwait Permier Index	6,272.01	0.96	4.17	4.17	4.17	-10.09	23.93 KWD	2.01	20.80
Kuwait Main Index	4,399.91	0.55	2.24	2.24	2.24	-10.40	8.46 KWD	1.49	13.52
NIC 50	6,929.50	0.77	3.85	3.94	12.00	-7.09	27.54 KWD	1.48	14.96
<b>Kuwait Sector</b>									
Banking	1,323.63	0.90	4.10	4.10	4.10	-10.72	19.39 KWD	2.10	20.33
Telecom	1,085.99	1.24	3.30	3.30	3.30	-2.75	3.28 KWD	1.92	13.02
Industrials	833.00	0.80	4.41	4.41	4.41	-10.19	2.95 KWD	1.34	21.30
Financial services	931.56	0.48	2.79	2.79	2.79	-13.86	2.33 KWD	0.92	6.87
Real estate	978.21	0.79	3.57	3.57	3.57	-7.60	2.08 KWD	1.14	21.26
Basic materials	805.43	1.95	3.62	3.62	3.62	-11.30	0.70 KWD	1.23	19.00
Health care	820.13	0.00	0.00	0.00	0.00	-7.28	0.41 KWD	6.22	51.97
Consumer services	754.43	0.39	1.85	1.85	1.85	-29.64	0.39 KWD	1.93	13.27
Insurance	1,013.37	-0.73	-3.32	-3.32	-3.32	6.24	0.37 KWD	0.90	8.15
Consumer goods	774.03	0.40	0.98	0.98	0.98	21.48	0.24 KWD	1.59	28.38
Oil and Gas	1,165.02	1.86	2.48	2.48	2.48	-5.91	0.24 KWD	1.68	10.55
Technology	527.44	4.17	2.98	2.98	2.98	2.40	0.01 KWD	0.57	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>		%	%	%	%	%			
Saudi (TASI)	8,369.33	1.35	0.90	0.85	0.85	-0.24	9,113 SAR	6.03	26.14
Qatar (QE Index)	10,016.28	0.60	0.10	0.26	0.26	-3.93	535 QAR	1.72	110.90
Dubai (DFMGI)	2,225.52	0.04	-1.77	-2.11	-2.11	-19.51	240 AED	20.58	10.58
Abu Dhabi (ADI)	4,482.78	-0.11	-0.21	-0.78	-0.78	-11.68	672 AED	4.60	15.49
Bahrain (BAX)	1,445.28	0.33	0.90	0.75	0.75	-10.24	16 BHD	1.63	13.18
MUSCAT SE INDEX	3,603.07	0.29	-0.32	-0.32	-0.32	-9.49	4 OMR	0.74	10.85
<b>Developed Markets</b>									
MSCI World Index	2,403.50	1.74	1.74	1.53	1.53	1.91			
U.S. (S&P 500)	3,408.63	1.80	1.80	1.36	1.36	5.50			
U.K. (FTSE 100)	5,952.75	0.17	0.86	1.48	1.48	-21.08			
Japan (Topix)	1,645.75	0.52	2.27	1.25	1.25	-4.39			
<b>Emerging Markets</b>									
MSCI EM Index	1,091.38	0.89	0.89	0.87	0.87	-2.09			
China (SSE Composite)	3,218.05	-0.20	-0.04	-5.23	7.82	5.51			
India (Sensex)	39,574.57	1.54	2.27	3.96	3.96	-4.07			



### What Move the GCC markets , Oil Prices

Oil prices gained on Tuesday amid supply disruptions in Norway, a new hurricane in the Gulf of Mexico, and U.S. President Donald Trump's return to the White House after being treated for COVID-19 in hospital.

The International Energy Agency (IEA) on Tuesday trimmed its 2020 outlook by 200,000 barrels per day (bpd) to 91.7 million bpd, citing caution about the pace of economic recovery. **Brent crude futures were up 82 cents, or 2%, at \$42.11 per barrel.**

### Kuwait Market

The market are closed today up by +0.86%, re-opening the local economy , more liquidity expected in MSCI , also still with fear of the second wave Covid19 More than 1 million people have died of Covid-19 as of Tuesday, with fatalities and infections surging in several countries.

### Saudi Market

The Market closed today up by 1.35% , linked to the slow economic recovery over the globe and re-opening the global economy and oil prices over \$40 a barrel.

# DAILY MARKETS WRAP,

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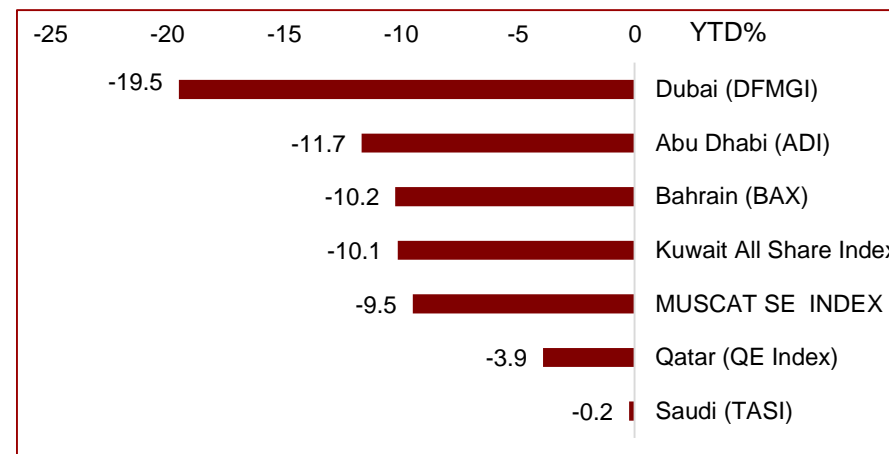
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	0.894	0.11	2.76	2.76	2.76	-12.27	6.11 KWD	1.72	21.44
KFH	0.693	0.73	4.84	4.84	4.84	-6.00	5.27 KWD	2.80	26.40
Zain	0.597	1.53	4.01	4.01	4.01	-0.50	2.54 KWD	2.07	12.51
BOUBYAN BANK	0.614	0.99	3.19	3.19	3.19	0.58	1.84 KWD	3.22	36.62
Agility	0.687	1.03	4.57	4.57	4.57	-3.42	1.38 KWD	1.17	20.43
<b>Saudi Arabia</b>									
ARAMCO	35.85	0.00	0.28	-0.14	-0.14	1.70	7,170.19 SAR	6.99	28.92
SABIC	88.80	0.57	0.34	0.45	0.45	-5.43	264.91 SAR	1.62	0.00
STC	104.00	1.56	3.17	3.59	3.59	2.16	204.81 SAR	3.25	18.76
AL-RAJHI BANK	66.80	1.67	1.37	1.67	1.67	2.14	164.25 SAR	3.16	16.59
NCB	38.00	1.47	2.01	2.29	2.29	-22.84	112.35 SAR	1.53	10.46
<b>United Arab Emirates</b>									
ETISALAT.AD	16.70	0.00	0.60	0.36	0.36	2.20	145.24 AED	3.20	16.48
FAB.AD	11.10	-0.18	-0.54	-1.42	-1.42	-26.91	121.43 AED	1.24	11.59
EMIRATES NBD	10.50	0.96	0.00	-1.41	-1.41	-19.23	65.69 AED	0.81	5.78
DB ISLAMIC BK	4.20	-0.24	-2.78	-2.78	-2.78	-23.77	30.48 AED	0.83	7.37
EMAAR PROPERT	2.69	-1.10	-4.61	-3.58	-3.58	-33.08	19.47 AED	0.35	3.82
<b>Qatar</b>									
QNB	18.05	0.89	-0.06	-1.15	-1.15	-12.63	165.19 QAR	1.82	12.84
INDUSTRIES QAT	10.00	1.71	0.95	1.51	1.51	-2.73	59.45 QAR	1.84	37.16
QA ISLAMIC BK	16.50	-0.60	-0.30	1.21	1.21	8.94	39.21 QAR	1.89	13.76
MASRAF AL RAYA	4.15	0.02	0.10	-0.24	-0.24	4.80	31.11 QAR	2.34	14.25
MESAIEED PETRO	2.11	0.52	0.96	1.49	1.49	-15.94	26.36 QAR	1.71	25.82
<b>OMAN</b>									
BANK MUSCAT	0.364	0.00	2.23	2.23	2.23	-11.45	1.19 OMR	0.61	7.47
OMANTEL	0.628	0.00	-1.27	-1.27	-1.27	1.30	0.47 OMR	0.88	6.83
BANK DHOFAR	0.103	0.00	-1.90	-1.90	-1.90	-16.26	0.31 QAR	0.45	20.20
NAT BANK OF OMAN	0.170	0.00	3.03	3.03	3.03	-7.61	0.28 QAR	0.52	7.14
OMINVEST	0.332	0.00	0.61	0.61	0.61	0.61	0.27 QAR	1.07	6.31

### Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
23-Sep-20	16.80%	11.97%	0.07%	0.27%	0.31%	3.77%	3.55%	7.85%	3.55%	2.94%
30-Sep-20	16.84%	12.11%	0.07%	0.18%	0.31%	3.64%	3.60%	7.93%	3.65%	2.94%

### End of Report

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### Leading Sector Performance

The market are up today by + 0.86 % The leading sector best performance indices today are Technology 4.17 % Basic materials 1.95 % Oil and Gas 1.86 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 21.48 % while the bottom sector performance is Consumer services by -29.64 %.

Telecommunication sector are up today by + 1.24 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 7.39 %.

### KSA

Saudi Armco are flat performance today 0 %, SABIC have positive performance today by + 0.57 %.

STC are have positive performance today by + 1.56 %, Al Rajhi Bank have positive performance today by + 1.67 %.

### UAE

ETISALAT AD flat, still outperform the market performance in year to date basis and act defensively with COVID19



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