



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



## GCC DAILY MARKET WRAP

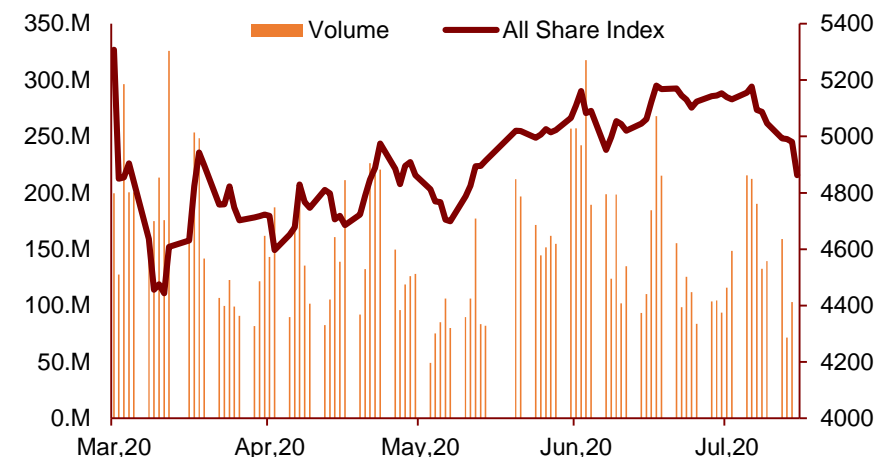
Thursday, July 23, 2020



### Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>		%	%	%	%	%			
Kuwait All Share Index	4,874.61	0.26	-3.40	-4.99	-4.99	-22.41	28.19 KWD	1.45	14.56
Kuwait Premier Index	5,279.45	0.36	-4.04	-5.84	-5.84	-24.32	20.33 KWD	1.53	14.45
Kuwait Main Index	4,076.98	-0.01	-1.69	-2.70	-2.70	-16.98	7.86 KWD	1.24	14.85
<b>Kuwait Sector</b>									
Banking	1,098.48	0.26	-3.68	-5.32	-5.32	-25.91	16.27 KWD	1.48	14.80
Telecom	974.83	0.39	-4.75	-5.93	-5.93	-12.70	2.99 KWD	1.72	10.80
Industrials	762.66	0.76	-2.30	-4.22	-4.22	-17.77	2.72 KWD	1.31	16.08
Financial services	831.13	0.52	-1.78	-4.24	-4.24	-23.15	2.10 KWD	0.78	11.67
Real estate	834.72	0.45	-4.25	-6.55	-6.55	-21.15	1.80 KWD	0.86	11.84
Basic materials	804.36	-3.14	-3.79	-1.61	-1.61	-11.42	0.72 KWD	1.17	18.15
Health care	839.19	0.00	0.00	2.21	2.21	-5.13	0.42 KWD	6.29	47.76
Consumer services	735.24	0.21	-2.91	-5.46	-5.46	-31.43	0.38 KWD	1.36	8.66
Insurance	937.61	-0.14	-0.19	-1.86	-1.86	-1.70	0.35 KWD	0.78	8.10
Consumer goods	713.90	0.38	1.48	-3.05	-3.05	12.04	0.22 KWD	1.52	30.89
Oil and Gas	1,091.02	0.38	-0.21	-0.02	-0.02	-11.89	0.23 KWD	1.63	9.17
Technology	465.60	0.00	0.00	-5.88	-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)	7,426.78	-0.01	0.00	2.81	2.81	-11.47	8,374 SAR	5.34	28.73
Qatar (QE Index)	9,368.29	-0.19	0.49	3.98	3.98	-10.25	499 QAR	1.64	33.72
Dubai (DFMGI)	2,052.65	-0.61	0.00	-0.61	-0.61	-25.76	222 AED	0.97	8.56
Abu Dhabi (ADI)	4,261.07	-0.03	-0.31	-0.58	-0.58	-16.05	602 AED	4.16	18.71
Bahrain (BAX)	1,284.64	-0.64	-1.37	0.55	0.55	-20.22	14 BHD	0.97	16.40
MUSCAT SE INDEX	3,563.88	1.20	3.29	1.36	1.36	-10.49	4 OMR	0.73	9.49
<b>Developed Markets</b>									
MSCI World Index	2,327.76	0.27	1.48	5.72	5.72	-1.30			
U.S. (S&P 500)	3,276.02	0.57	1.59	5.67	5.67	1.40			
U.K. (FTSE 100)	6,234.13	0.44	-0.89	1.04	1.04	-17.35			
Japan (Topix)	1,572.96	-0.62	-0.06	0.91	0.91	-8.62			
<b>Emerging Markets</b>									
MSCI EM Index	1,077.78	-0.74	2.15	8.31	8.31	-3.31			
China (SSE Composite)	3,325.11	-0.24	3.45	11.41	11.41	9.02			
India (Sensex)	38,140.47	0.71	3.21	9.44	9.44	-7.38			



### What Move the GCC markets , Oil Prices

Oil prices moved lower on Thursday after a surprise increase in U.S. crude oil reserves as the coronavirus pandemic hit fuel consumption weighed on prices.

U.S. crude and distillate inventories rose unexpectedly and fuel demand slipped in the most recent week, the Energy Information Administration said on Wednesday, as a sharp rise in coronavirus cases has started to hit U.S. consumption. **Brent crude fell 20 cents, or 0.45%, to trade at \$44.09 per barrel**

### Kuwait Market

The market are closed today up by +0.26%, while the week closing in negative territory linked to the downgrade of S&P to Kuwait credit rating to -AA from AA , also the uncertainty of the closer disclosures of companies semiannual financial results and fear of the second wave coronavirus effect of the global economy. **Value traded over 18.8 Million KD.**

### Saudi Market

The Market closed down today by -0.01% , 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



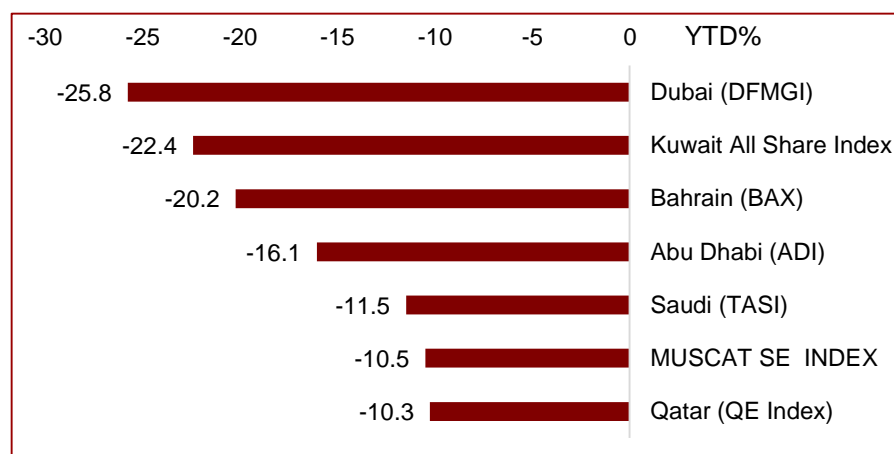
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Blue Chip Watch</b>									
		%	%	%	%	%			
<b>Kuwait</b>									
NBK	0.758	0.40	-5.13	-7.67	-7.67	-25.62	5.19 KWD	1.33	13.24
KFH	0.568	0.00	-3.89	-7.19	-7.19	-22.96	4.36 KWD	1.90	17.47
Zain	0.523	1.36	-4.74	-5.77	-5.77	-12.83	2.26 KWD	1.84	10.98
BOUBYAN BANK	0.504	-0.40	-4.91	-5.26	-5.26	-17.44	1.53 KWD	2.34	25.73
Agility	0.720	1.69	-1.77	-1.91	-1.91	-11.98	1.27 KWD	1.09	14.01
<b>Saudi Arabia</b>									
ARAMCO	33.00	0.00	-1.20	1.54	1.54	-6.38	6,600.70 SAR	6.17	21.21
SABIC	88.00	0.46	-0.23	-0.11	-0.11	-6.28	262.83 SAR	1.57	217.61
STC	97.10	-2.12	1.15	-1.92	-1.92	-4.62	198.42 SAR	3.16	18.13
AL-RAJHI BANK	57.80	0.35	0.70	2.12	2.12	-11.62	144.02 SAR	2.90	14.43
NCB	35.85	-0.14	-0.14	-3.76	-3.76	-27.21	107.71 SAR	1.68	9.37
<b>United Arab Emirates</b>									
ETISALAT.AD	16.96	0.24	1.31	2.79	2.79	3.67	147.15 AED	3.24	16.69
FAB.AD	10.62	0.00	-2.76	-5.87	-5.87	-30.21	115.97 AED	1.24	10.27
EMIRATES NBD	8.89	-1.22	3.98	0.34	0.34	-31.62	56.15 AED	0.69	5.00
DB ISLAMIC BK	3.80	-0.52	-1.30	-0.52	-0.52	-31.03	27.51 AED	0.75	6.69
EMAAR PROPERT	2.60	-1.52	-1.52	-4.76	-4.76	-35.32	18.62 AED	0.34	3.05
<b>Qatar</b>									
QNB	18.09	-0.28	-0.61	3.91	3.91	-12.24	167.62 QAR	1.85	13.02
INDUSTRIES QAT	8.15	0.62	2.47	5.25	5.25	-21.21	49.03 QAR	1.53	23.29
QA ISLAMIC BK	16.00	0.44	2.50	1.52	1.52	4.31	37.66 QAR	1.81	13.20
MASRAF AL RAYA	3.89	-0.03	0.28	1.91	1.91	-1.69	29.19 QAR	2.20	13.36
MESAIEED PETRO	2.08	-1.42	-0.48	3.47	3.47	-16.73	26.53 QAR	1.84	27.42
<b>OMAN</b>									
BANK MUSCAT	0.348	1.17	2.37	2.98	2.98	-16.29	1.11 OMR	0.58	6.50
OMANTEL	0.608	0.00	0.00	-5.00	-5.00	-1.30	0.46 OMR	0.81	5.87
BANK DHOFAR	0.100	0.00	3.09	-4.76	-4.76	-18.70	0.30 QAR	0.44	18.68
NAT BANK OF OMAN	0.169	-0.59	3.05	-2.87	-2.87	-8.15	0.28 QAR	0.52	6.64
OMINVEST	0.344	0.00	1.18	1.18	1.18	4.24	0.28 QAR	0.89	8.69

### Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
15-Jul-20	16.48%	11.83%	0.09%	0.36%	0.32%	3.53%	3.38%	7.54%	3.34%	2.90%
22-Jul-20	16.47%	11.62%	0.09%	0.38%	0.33%	3.56%	3.38%	7.60%	3.37%	2.92%

### End of Report

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### Leading Sector Performance

#### Kuwait

The market are up today by + 0.26 % The leading sector best performance indices today are Industrials 0.76 % Financial services 0.52 % Real estate 0.45 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 12.36 % while the bottom sector performance is Consumer services by -31.77 %

KFH has a positive price return performance spread over NBK in YTD perspective by +2.66%. Banking sector performance year to date are -25.87 %

#### KSA

Saudi Armco are flat performance today 0 %, SABIC have positive performance today by + 0.46 %

STC are have negative performance today by -2.12 %, Al Rajhi Bank have positive performance today by + 0.35 %

#### UAE

ETISALAT.AD are up today by +0.24% also less affected by the COVID 19 Crises as telecommunication sectors are outperform and act defensively on this crises.



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