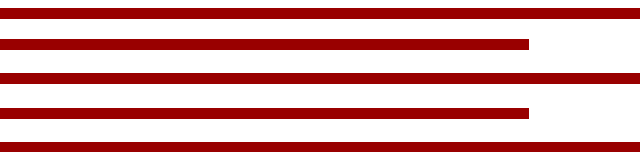


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

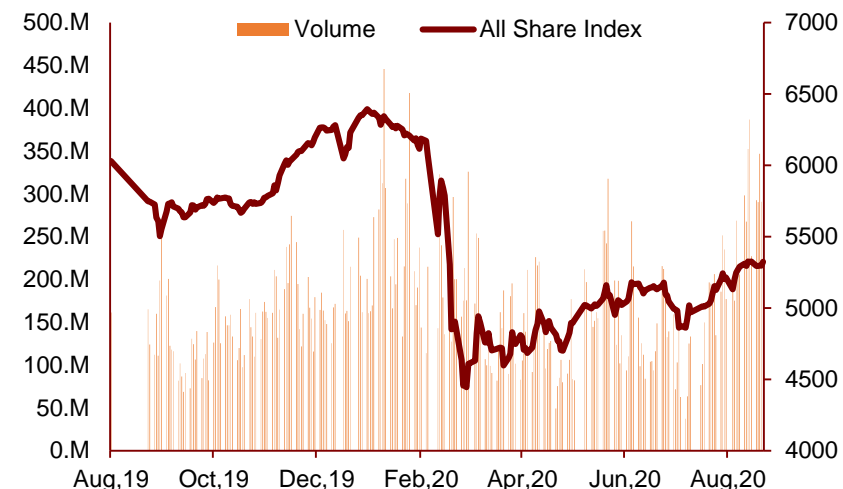
Thursday, September 10, 2020



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,324.42	0.54	-0.03	0.57	3.78	-15.25	30.84 KWD	1.77	18.18
Kuwait Permier Index	5,835.72	0.39	-0.50	-0.32	4.08	-16.35	22.52 KWD	1.89	19.54
Kuwait Main Index	4,315.78	0.96	1.31	3.13	3.00	-12.11	8.32 KWD	1.43	14.53
Kuwait Sector									
Banking	1,232.52	0.56	-0.35	-0.01	6.24	-16.87	18.25 KWD	1.95	19.16
Telecom	1,053.40	0.32	-0.05	-1.62	1.65	-5.67	3.23 KWD	1.89	12.71
Industrials	789.00	1.25	1.35	3.01	-0.91	-14.93	2.82 KWD	1.33	20.96
Financial services	914.45	-0.09	0.21	4.46	5.36	-15.44	2.30 KWD	0.91	7.29
Real estate	894.84	0.55	1.11	2.44	0.18	-15.47	1.92 KWD	1.00	22.58
Basic materials	765.35	-0.38	-1.52	-1.95	-6.38	-15.72	0.68 KWD	1.14	18.70
Health care	829.21	0.00	0.00	0.00	1.00	-6.26	0.41 KWD	6.19	52.21
Consumer services	728.67	1.29	1.61	1.70	-6.31	-32.04	0.38 KWD	1.89	12.48
Insurance	987.94	-0.07	0.15	2.04	3.41	3.57	0.36 KWD	0.86	7.90
Consumer goods	768.24	1.48	-4.35	-3.42	4.33	20.57	0.24 KWD	1.58	27.82
Oil and Gas	1,136.16	2.36	5.13	3.63	4.12	-8.24	0.24 KWD	1.60	10.24
Technology	509.25	1.60	2.49	2.49	2.94	-1.13	0.01 KWD	0.57	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	8,135.16	0.69	1.12	2.45	12.61	-3.03	9,061 SAR	6.03	26.69
Qatar (QE Index)	9,763.78	0.53	-0.74	-0.83	8.50	-6.35	518 QAR	1.68	74.53
Dubai (DFMGI)	2,270.52	-0.14	-0.53	1.12	9.94	-17.88	244 AED	25.58	10.69
Abu Dhabi (ADI)	4,519.14	0.23	-0.73	0.00	5.44	-10.97	668 AED	4.38	15.00
Bahrain (BAX)	1,389.71	-0.35	-1.45	0.64	8.77	-13.69	15 BHD	1.44	12.80
MUSCAT SE INDEX	3,686.29	-0.02	-1.59	-2.26	4.85	-7.40	4 OMR	0.75	11.12
Developed Markets									
MSCI World Index	2,393.75	1.67	-0.24	-2.52	8.72	1.50			
U.S. (S&P 500)	3,398.96	2.01	-0.82	-2.90	9.63	5.21			
U.K. (FTSE 100)	5,985.73	-0.45	3.22	0.37	-2.98	-20.64			
Japan (Topix)	1,624.86	1.21	0.51	0.41	4.24	-5.61			
Emerging Markets									
MSCI EM Index	1,085.75	-0.16	-1.25	-1.43	9.11	-2.59			
China (SSE Composite)	3,234.82	-0.61	-3.59	-4.74	8.38	6.06			
India (Sensex)	38,840.32	1.69	1.26	0.55	11.24	-5.85			



What Move the GCC markets , Oil Prices

Oil prices slid on Thursday after data showed U.S. crude stockpiles unexpectedly rose last week, stoking concern about a sluggish recovery in fuel demand as coronavirus cases continue to surge in many countries.

Prices were pressured by extended declines in the U.S. equities market and by a report showing U.S. job growth slowed further in August as financial assistance from the government ran out. Brent crude futures dropped 37 cents, or 0.96% to \$40.39 a barrel, after rising 2.5% on Wednesday.

Kuwait Market

The market are closed today up by +0.54% , after re-opening the local economy , oil performance , MSCI positive liquidity expectation , New IPO's

Saudi Market

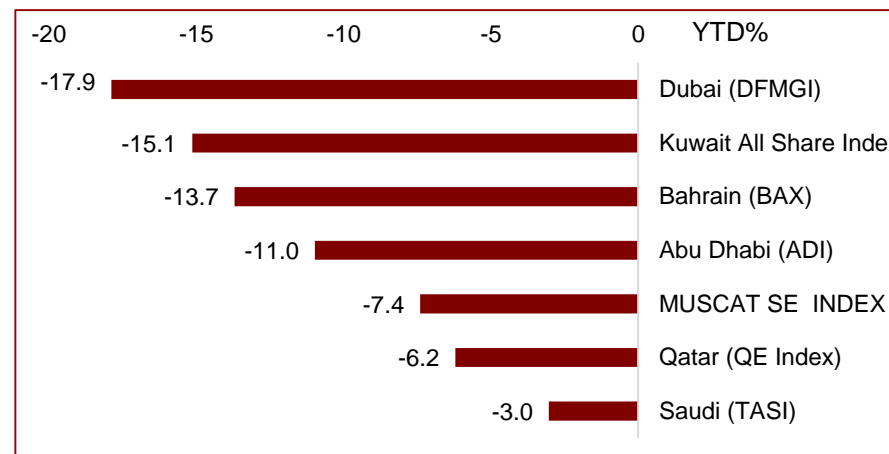
The Market closed today up by +0.69% , linked to the slow economic recovery over the globe and re-opening the global economy and oil prices over \$40 a barrel

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.859	0.23	-0.58	-0.12	4.63	-15.71	5.88 KWD	1.66	20.58
KFH	0.625	0.16	-0.48	-0.16	2.12	-15.23	4.80 KWD	2.55	23.94
Zain	0.574	0.35	-0.69	-2.71	3.42	-4.33	2.48 KWD	2.02	12.17
BOUBYAN BANK	0.594	-0.34	1.71	2.77	11.65	-2.70	1.80 KWD	3.15	35.90
Agility	0.627	0.64	0.32	0.64	-1.61	-11.71	1.27 KWD	1.08	18.71
Saudi Arabia									
ARAMCO	35.70	-0.28	-0.83	0.42	9.85	1.28	7,160.57 SAR	6.98	29.63
SABIC	88.10	0.11	-1.89	0.11	0.00	-6.18	264.02 SAR	1.61	0.00
STC	99.20	1.02	1.54	3.33	0.20	-2.55	196.42 SAR	3.12	18.37
AL-RAJHI BANK	66.50	0.45	0.76	2.47	17.49	1.68	165.51 SAR	3.19	16.89
NCB	37.00	0.00	-0.27	-0.54	-0.67	-24.87	111.01 SAR	1.51	10.37
United Arab Emirates									
ETISALAT.AD	16.58	0.48	-1.08	-0.12	0.24	1.10	144.19 AED	3.18	16.28
FAB.AD	11.42	0.35	-1.21	-0.35	1.60	-24.67	124.71 AED	1.28	11.86
EMIRATES NBD	10.70	0.00	-0.93	-0.93	20.77	-17.69	67.59 AED	0.83	5.95
DB ISLAMIC BK	4.34	-0.69	1.40	5.85	13.61	-21.23	31.42 AED	0.86	7.65
EMAAR PROPERT	2.91	-0.68	-2.68	1.04	6.59	-27.61	20.83 AED	0.37	4.12
Qatar									
QNB	17.72	0.23	-1.56	-1.56	1.90	-13.94	163.67 QAR	1.80	12.69
INDUSTRIES QAT	9.99	0.40	-1.09	1.32	29.81	-2.82	60.44 QAR	1.87	37.62
QA ISLAMIC BK	16.00	0.63	0.00	0.00	1.59	4.37	37.81 QAR	1.82	13.18
MASRAF AL RAYA	4.15	1.22	-1.01	-0.84	8.25	4.42	31.13 QAR	2.34	14.08
MESAIEED PETRO	2.09	0.05	-2.24	-1.32	3.56	-16.65	26.28 QAR	1.71	25.72
OMAN									
BANK MUSCAT	0.386	0.52	-0.51	-2.51	15.48	-6.13	1.26 OMR	0.65	7.88
OMANTEL	0.624	0.65	0.00	-0.64	-2.50	1.30	0.47 OMR	0.88	6.79
BANK DHOFAR	0.111	0.00	-0.89	0.00	5.71	-9.76	0.33 QAR	0.49	21.76
NAT BANK OF OMAN	0.170	0.59	-3.93	-3.93	-1.72	-7.07	0.28 QAR	0.52	7.14
OMINVEST	0.322	-1.20	-0.61	-1.80	-3.53	-0.61	0.26 QAR	1.05	6.31



Leading Sector Performance

Kuwait

The market are up today by +0.54 % The leading sector best performance indices today are Oil and Gas 2.36 % Technology 1.6 % Consumer goods 1.48 % respectively

from YTD performance perspective the best sector performance are Consumer goods by 20.57 % while the bottom sector performance is Consumer services by -32.04 %

Telecommunication sector are up today by +0.32 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by +9.46 %

KSA

Saudi Armco are have negative performance today by -0.28 %, SABIC have positive performance today by +0.11 %.

STC are have positive performance today by +1.02 %, Al Rajhi Bank have positive performance today by +0.45 %,

UAE

ETISALAT AD are down today by -1.08%, still outperform the market performance and act defensively with COVID19

Summary - Absolute change in Foreign Ownership

	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
2-Sep-20	16.63%	11.63%	0.07%	0.33%	0.32%	3.62%	3.45%	7.66%	3.40%	2.93%
9-Sep-20	16.68%	11.69%	0.07%	0.32%	0.31%	3.65%	3.54%	7.72%	3.46%	2.94%

End of Report

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