



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



## GCC DAILY MARKET WRAP

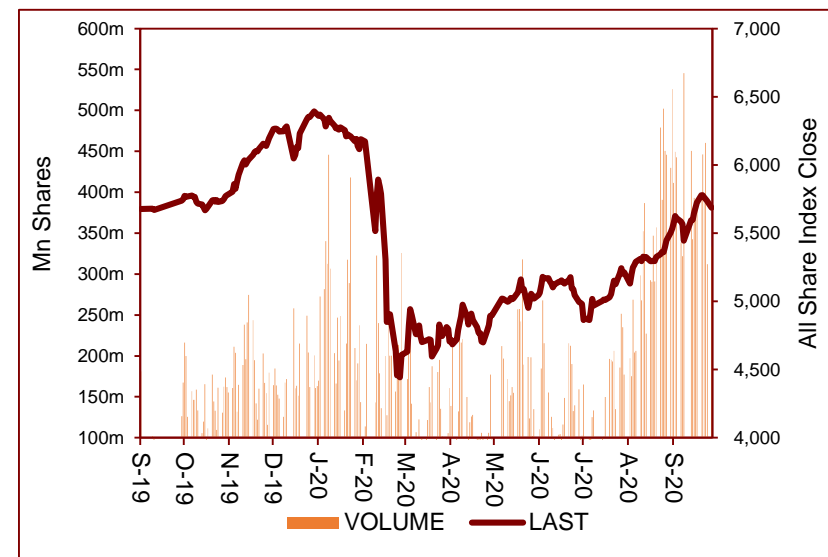
Wednesday, October 21, 2020



### Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>		%	%	%	%	%			
Kuwait All Share Index	5,657.39	0.50	-1.36	3.90	3.90	-9.95	32.78 KWD	1.91	18.91
Kuwait Premier Index	6,280.60	0.57	-1.52	4.31	4.31	-9.97	24.25 KWD	2.04	20.80
Kuwait Main Index	4,418.69	0.30	-0.88	2.68	2.68	-10.02	8.54 KWD	1.53	13.53
NIC 50	6,949.10	0.45	-1.57	4.24	4.24	-6.83	28.60 KWD	1.57	15.56
<b>Kuwait Sector</b>									
Banking	1,323.01	0.45	-1.56	4.05	4.05	-10.77	19.59 KWD	2.14	20.47
Telecom	1,111.54	1.44	-0.51	5.73	5.73	-0.46	3.41 KWD	1.99	13.31
Industrials	837.86	0.53	-1.06	5.02	5.02	-9.67	2.99 KWD	1.41	21.12
Financial services	956.27	0.15	-0.65	5.51	5.51	-11.58	2.41 KWD	0.94	7.08
Real estate	932.75	0.04	-3.25	-1.24	-1.24	-11.89	2.01 KWD	1.05	20.30
Basic materials	824.38	0.72	-1.29	6.06	6.06	-9.22	0.73 KWD	1.22	19.05
Health care	821.04	0.00	0.00	0.11	0.11	-7.18	0.41 KWD	6.22	52.00
Consumer services	748.90	0.54	-1.33	1.10	1.10	-30.16	0.39 KWD	1.83	13.84
Insurance	991.62	0.35	-0.99	-5.39	-5.39	3.96	0.37 KWD	0.87	7.96
Consumer goods	767.92	0.53	0.07	0.18	0.18	20.52	0.24 KWD	1.58	28.07
Oil and Gas	1,178.48	0.14	-1.02	3.66	3.66	-4.82	0.25 KWD	1.76	10.84
Technology	517.98	0.28	-0.28	1.14	1.14	0.57	0.01 KWD	0.58	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>		%	%	%	%	%			
Saudi (TASI)	8,496.85	-0.42	-0.67	2.38	2.38	1.28	9,138 SAR	5.95	26.51
Qatar (QE Index)	9,965.03	-0.50	-0.34	-0.25	-0.25	-4.42	539 QAR	1.69	12.50
Dubai (DFMGI)	2,171.18	-0.44	-1.07	-4.50	-4.50	-21.47	235 AED	1.25	11.42
Abu Dhabi (ADI)	4,543.70	0.02	-0.23	0.57	0.57	-10.48	680 AED	4.61	15.61
Bahrain (BAX)	1,453.56	-0.07	-1.64	1.33	1.33	-9.73	16 BHD	1.73	13.31
MUSCAT SE INDEX	3,586.55	-0.01	-0.20	-0.78	-0.78	-9.91	4 OMR	0.75	11.47
<b>Developed Markets</b>									
MSCI World Index	2,422.71	0.21	-0.71	2.34	2.34	2.72			
U.S. (S&P 500)	3,443.12	0.00	-1.17	2.38	2.38	6.57			
U.K. (FTSE 100)	5,813.08	-1.29	-1.80	-0.90	-0.90	-22.93			
Japan (Topix)	1,637.60	0.73	1.23	0.75	0.75	-4.87			
<b>Emerging Markets</b>									
MSCI EM Index	1,133.94	0.59	0.88	4.80	4.80	1.73			
China (SSE Composite)	3,325.02	-0.09	-0.34	3.32	3.32	9.01			
India (Sensex)	40,707.31	0.40	1.75	6.87	6.87	-1.38			



### What Move the GCC markets ,

#### Oil Prices

Oil prices fell on Wednesday after a surprise climb in U.S. crude stockpiles added to concerns about a global supply glut as a spike in global Covid-19 cases fuels demand fears and production returns in Libya. Brent crude futures for December delivery were at \$42.94 a barrel.

#### Kuwait Market

The market are closed today up by +0.50%, with re-opening the local economy , MSCI liquidity expectation, while Coronavirus concerns continue to weigh on sentiment too as infections surge in the region. Coronavirus restrictions are returning across Europe, increased uncertainty over the outlook for economic growth.

#### Saudi Market

The Market closed today down by -0.42% and turn positive YTD performance leading all GCC markets , today market flat are linked to the slow economic recovery over the globe and fear form the Covid19 second wave and oil prices over \$42 a barrel.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



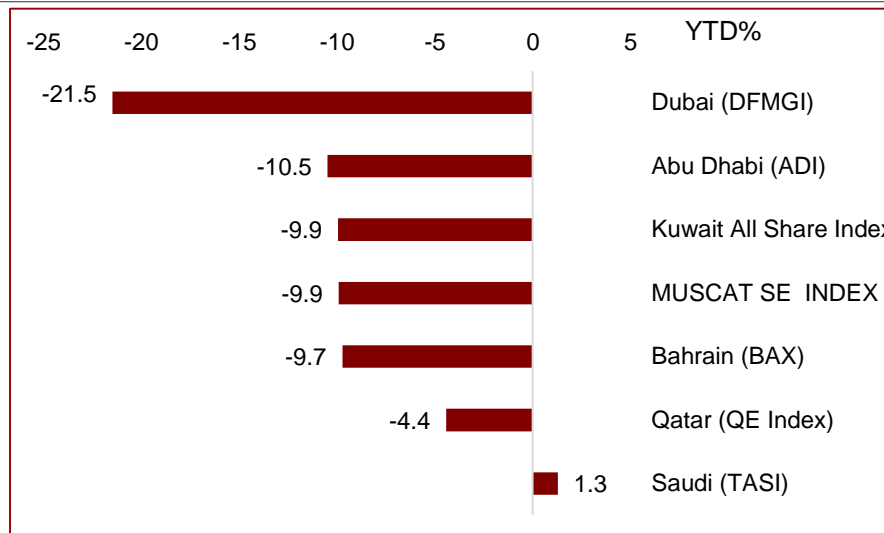
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	0.885	0.45	-0.56	1.72	1.72	-13.15	6.06 KWD	1.71	21.15
KFH	0.696	0.58	-1.69	5.30	5.30	-5.60	5.34 KWD	2.84	26.55
Zain	0.611	1.50	-0.81	6.45	6.45	1.83	2.64 KWD	2.15	12.81
BOUBYAN BANK	0.624	0.32	-2.04	4.87	4.87	2.22	1.89 KWD	3.31	37.47
Agility	0.682	0.29	-1.87	3.81	3.81	-4.12	1.38 KWD	1.17	20.43
<b>Saudi Arabia</b>									
ARAMCO	35.30	-0.56	-1.40	-1.67	-1.67	0.14	7,099.81 SAR	6.92	29.38
SABIC	97.10	0.62	1.04	9.84	9.84	3.41	289.49 SAR	1.77	0.00
STC	103.20	-0.19	-0.77	2.79	2.79	1.38	206.79 SAR	3.29	19.51
AL-RAJHI BANK	66.50	-0.30	-0.60	1.22	1.22	1.68	166.75 SAR	3.21	17.04
NCB	39.95	-0.87	-3.97	7.54	7.54	-18.88	120.90 SAR	1.65	11.35
<b>United Arab Emirates</b>									
ETISALAT.AD	16.98	0.24	0.47	1.92	1.92	3.79	147.67 AED	3.25	16.71
FAB.AD	11.18	0.18	-0.36	-0.53	-0.53	-26.25	122.09 AED	1.25	11.63
EMIRATES NBD	9.40	-3.39	-6.47	-11.74	-11.74	-27.69	59.38 AED	0.72	8.28
DB ISLAMIC BK	4.11	0.24	-0.96	-4.86	-4.86	-25.41	29.76 AED	0.80	7.18
EMAAR PROPERT	2.62	-1.13	-0.38	-6.09	-6.09	-34.83	18.76 AED	0.34	3.72
<b>Qatar</b>									
QNB	17.70	-0.06	-1.12	-2.75	-2.75	-14.04	163.48 QAR	1.76	13.77
INDUSTRIES QAT	9.60	-1.14	-2.32	-2.42	-2.42	-6.50	58.08 QAR	1.80	37.35
QA ISLAMIC BK	16.51	-0.42	0.24	0.06	0.06	7.70	39.01 QAR	1.80	13.74
MASRAF AL RAYA	4.20	0.50	0.62	0.99	0.99	6.09	31.50 QAR	2.27	14.33
MESAIEED PETRO	2.07	-1.29	-1.19	-0.43	-0.43	-17.53	26.01 QAR	1.69	26.21
<b>OMAN</b>									
BANK MUSCAT	0.364	-1.09	-2.15	1.68	1.68	-11.94	1.18 OMR	0.61	7.51
OMANTEL	0.624	0.65	0.65	-1.27	-1.27	1.30	0.47 OMR	0.88	6.79
BANK DHOFAR	0.107	-1.83	3.88	1.90	1.90	-13.01	0.32 QAR	0.47	21.37
NAT BANK OF OMAN	0.164	0.00	-2.37	0.00	0.00	-10.33	0.27 QAR	0.51	6.93
OMINVEST	0.328	1.26	-1.83	-2.42	-2.42	-2.42	0.26 QAR	1.03	6.05

### Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
7-Oct-20	16.89%	12.21%	0.06%	0.19%	0.31%	3.62%	3.64%	8.01%	3.70%	2.96%
14-Oct-20	16.93%	12.38%	0.06%	0.12%	0.31%	3.59%	3.73%	8.14%	3.80%	2.96%

### End of Report

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### Leading Sector Performance

The market are up today by +0.5 % The leading sector best performance indices today are Telecom 1.44 % Basic materials 0.72 % Consumer services 0.54 % respectively.

from YTD performance perspective the best sector performance are Consumer goods by 20.52 % while the bottom sector performance is Consumer services by -30.16 %.

Telecommunication sector are up today by +1.44 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by +9.49 %.

### KSA

Saudi Armco are have negative performance today by -0.56 %, SABIC have positive performance today by +0.62 %.

STC are have negative performance today by -0.19 %, Al Rajhi Bank have negative performance today by -0.3 %

### UAE

ETISALAT AD up by +0.24%, still outperform the market performance in year to date basis and act defensively with COVID19



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