

## Kuwait Market Indices

Indicators	M. Cap (KD mn)	Last Close	% WTD	% MTD	% YTD	P/E	P/B
Kuwait All Share Index	29,634	6,164	2.3	3.2	-15.0	17.7	1.7
Main Market Index	7,899	4,816	0.3	-0.1	-13.8	14.8	1.3
Premier Market Index	21,735	6,846	3.1	4.4	-15.4	18.6	1.8
Kuwait Islamic Index	11,803	71	1.7	2.2	-23.2	15.6	1.2

Note: TR denotes Total Return indices

## Buzzing Stocks – Premier Market

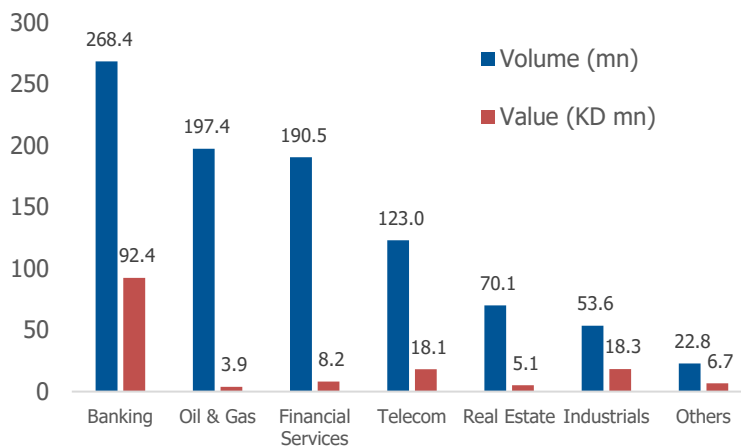
Company Name	Volume Increase
Mezzan Holding Company KSCP	3.9x
Human Soft Holding Company KSCP	1.8x
Boubyan Bank KSCP	1.6x
Kuwait Finance House KSC	1.4x
Gulf Bank KSCP	1.1x

Note: Change in 5-day average volume over 50-day average volume is shown.

## Top Gainers

Company Name	M Cap (KD mn)	WTD %
Ream Real Estate Company KSCP	10.3	45.9
Kuwait and Middle East Financial Investment Co KSCP	29.8	18.9
Aqar Real Estate Investments Co KSCP	17.5	18.1
Hayat Communications Co KSCP	4.6	11.3
Al Argan International Real Estate Co KSCP	23.8	10.4

## Kuwait Sector Volume and Value Traded



Note: Others includes Consumer Services, Basic Materials, Consumer Goods, Insurance, Healthcare and Technology

## Top OTC Trades by Volume

Companies	Last Close	% WTD	Total Volume for Week	Value Traded for Week(KD)
Alhayat International Real Estate Company	50	18	93,641	9,364.1
Al-Nawadi Holding Co (K.S.C)	51.5	-5	23,517	892.8
Gulf National Holding K.S.C.C	120	0	10,000	110
Alsafat Investment Co	22	-4	3,533	71.4
Boursa Kuwait Securities Company (K.P.S.C)	800	7	3,235	97.1

## Buzzing Stock – Main Market

Company Name	Volume Increase
Amwal International Investment Company KSCP	10x
Kuwait Reinsurance Company KSCP	10x
Kuwait National Cinema Company KPSC	9.8x
Kuwait Syrian Holding Co KSCP	9.6x
Independent Petroleum Group KSCP	8.0x

Note: Change in 5-day average volume over 50-day average volume is shown.

## Top Losers

Company Name	M Cap (KD mn)	WTD %
Kuwait National Cinema Company KPSC	68.6	-9.3
Al Madina for Finance and Investment Co KSCP	4.3	-8.7
AAN Digital Services Co KSCP	8.9	-8.1
Ekttitab Holding Co KSCP	4.0	-8.1
Kuwait Hotels Co KPSC	5.2	-6.6

## Sector Liquidity

Sector	ADVT for the week (KD)	ADVT for the month (KD)	Weekly ADVT/Monthly ADVT	Sector Beta
Banks	18,486,627	16,745,152	1.1x	1.1
Industrials	3,667,651	4,353,791	0.8x	1.0
Telecom	3,621,741	2,735,826	1.3x	1.0
Financial Services	1,645,454	1,836,534	0.8x	0.7
Real estate	1,020,896	1,088,280	0.9x	0.7
Basic Materials	261,124	433,389	0.6x	0.7
Consumer Services	233,608	177,596	1.3x	0.6
Consumer Goods	826,808	324,859	2.5x	0.4
Oil & Gas	779,960	240,406	3.2x	0.4
Insurance	29,833	27,064	1.1x	0.1
Technology	-	4,827	0x	0.0
Healthcare	-	60	0x	0.0

Note: Sector beta computed by regressing 3year weekly returns on Kuwait all share index. ADVT – Average Daily Value Traded

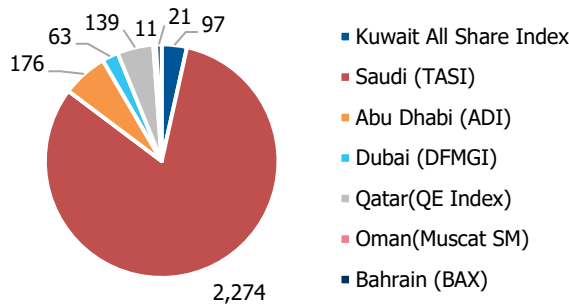
## Kuwait Sector Performance &amp; Valuation

Indicators	M. Cap (KD Mn)	Last Close	Volume (mn)	Value (KD mn)	% WTD	% MTD	% YTD	P/E	P/B	P/S	EV/EBITD A	% of Total M.Cap
<b>Banking</b>	17,408	1,177	268.4	92.4	3.4	4.7	-20.6	18.7	1.8	4.8	10.4	58.74
National Bank of Kuwait SAKP	5,566.6	814.0	18.2	14,758	2.9	3.2	-20.1	19.5	1.6	4.9	6.6	18.78
Kuwait Finance House KSCP	4,703.9	614.0	61.2	37,048	4.4	6.2	-16.7	23.6	2.5	5.1	11.5	15.87
Ahli United Bank BSC	1,960.1	202.0	95.3	18,995	4.7	8.0	-31.2	9.2	1.3	3.5	9.9	6.61
<b>Telecommunications</b>	3,201	1,046	123.0	18.1	2.8	3.5	-6.4	12.8	1.9	1.4	5.4	10.80
Mobile Telecommunications Company KSCP	2,479.5	574.0	29.2	16,595	3.6	4.4	-4.3	12.2	2.0	1.5	5.9	8.37
National Mobile Telecommunications Co KSCP	289.8	576.0	0.6	371	-1.5	0.3	-30.4	20.0	0.5	0.5	2.5	0.98
Kuwait Telecommunications Company KSCP	417.8	838.0	N.A	N.A	1.5	1.0	6.3	10.6	2.0	N.A	N.A	1.41
<b>Industrials</b>	2,741	768	53.6	18.3	-0.6	-0.7	-17.2	13.9	1.3	1.9	9.5	9.25
Agility Public Warehousing Co KSCP	1,297.3	641.0	13.1	8,445	-0.5	0.2	-9.9	14.6	1.1	0.8	8.9	4.38
Human Soft Holding Company KSCP	312.8	2,563	1.8	4,488	-1.0	-6.1	-14.9	11.8	3.5	5.1	8.2	1.06
ALAFCO Aviation Lease and Finance Company KSCP	141.6	149.0	13.5	2,032	-3.2	-3.2	-45.2	6.4	0.4	1.3	11.2	0.48
<b>Financial Services</b>	2,120	822.0	190.5	8.2	-0.7	-1.7	-24.0	7.9	0.9	4.6	8.5	7.16
GFH Financial Group BSC	176.5	47.5	1.5	70	-0.8	0.4	-31.1	6.7	0.5	1.7	18.1	0.60
Kuwait Projects Company Holding KSCP	295.5	148.0	5.1	757	-0.7	0.0	-31.5	N.A	0.7	0.4	87.8	1.00
Egypt Kuwait Holding Co SAE	333.5	340.0	0.0	0	-4.8	-9.3	-24.4	10.9	2.3	2.0	7.0	1.13
<b>Real Estate</b>	1,859	866.0	70.1	5.1	0.8	2.4	-18.2	16.4	1.0	7.3	18.7	6.27
Mabane Company KPSC	716.0	649.0	5.0	3,203	2.2	7.5	-24.0	24.2	1.6	9.9	25.9	2.42
Salhia Real Estate Co KSCP	204.7	400.0	0.2	83	0.0	0.8	-4.1	9.2	1.2	4.6	18.3	0.69
Tamdeen Real Estate Co KPSC	108.7	252.0	0.0	3	-3.1	-3.1	-21.5	13.3	0.5	4.6	82.1	0.37
<b>Basic Materials</b>	699	786	3.6	1.3	2.5	3.1	-13.4	17.1	1.1	2.7	6.6	2.36
Boubyan Petrochemical Company KSCP	292.1	547.0	1.1	587	1.1	1.7	-18.1	23.5	1.2	3.9	62.7	0.99
Qurain Petrochemical Industries Company KSCP	313.2	285.0	2.5	715	4.8	5.6	-8.1	11.4	0.7	1.3	10.5	1.06
Al-Kout Industrial Projects Company KPSC	77.5	769.0	N.A	N.A	0.0	0.0	-9.5	16.2	2.5	2.7	8.7	0.26
<b>Healthcare</b>	415	839	N.A	N.A	0.0	0.0	-5.1	47.8	6.3	4.2	20.4	1.40
Al-Maidan Clinic for Oral Health Services Co KSCP	304.5	1,220	N.A	N.A	0.0	0.0	0.0	47.5	7.8	5.5	23.3	1.03
Advanced Technology Co KSCP	98.8	660.0	N.A	N.A	0.0	0.0	-18.5	53.7	1.7	0.7	13.9	0.33
Yiaco Medical Company KPSC	12.1	707.0	N.A	N.A	0.0	0.0	0.1	5.5	6.1	0.3	N.A	0.04
<b>Consumer Services</b>	382	739	7.8	1.2	-0.7	-2.2	-31.1	12.1	1.4	1.6	6.6	1.29
Jazeera Airways Co KSCP	119.2	597.0	1.3	788	-0.8	-3.7	-45.7	8.0	3.0	1.2	6.7	0.40
Kuwait National Cinema Company KPSC	68.6	680.0	N.A	N.A	-9.3	-9.3	-35.1	27.5	0.9	4.6	8.1	0.23
IFA Hotels and Resorts Co KSCP	14.7	23.2	0.3	7	-0.4	2.2	-57.8	N.A	0.8	0.2	N.A	0.05
<b>Insurance</b>	350	952.0	2.8	0.1	-1.2	1.4	-0.2	8.1	0.8	1.1	3.6	1.18
Gulf Insurance Group KSCP	108.3	580.0	0.0	10	-3.3	4.3	-12.1	7.8	1.0	0.5	3.7	0.37
Al Ahleia Insurance Co SAKP	79.9	400.0	N.A	N.A	-3.6	-3.6	-6.5	7.7	0.7	1.0	5.4	0.27
Kuwait Insurance Company SAKP	66.8	345.0	0.2	58	0.0	1.5	4.5	5.7	0.7	2.4	4.8	0.23
<b>Oil &amp; Gas</b>	224	1,076	197.4	3.9	3.1	-1.8	-13.1	10.3	1.6	2.0	10.6	0.75
Independent Petroleum Group KSCP	75.2	400.0	N.A	N.A	5.3	5.3	-17.0	10.9	0.7	0.1	16.8	0.25
National Petroleum Services Company KSCP	104.3	1,045	0.0	12	2.5	-7.4	-10.7	11.7	2.7	3.4	7.2	0.35
Energy House Holding Company KSCP	15.6	20.8	0.2	5	-1.0	-5.5	-8.8	N.A	0.7	3.6	N.A	0.05
<b>Consumer Goods</b>	235	767	8.6	4.1	5.5	6.0	20.3	33.3	1.6	0.8	12.9	0.79
Mezzan Holding Company KSCP	191.1	615.0	5.9	3,621	5.1	6.0	23.0	33.2	1.8	0.9	13.5	0.65
Livestock Transport and Trading Co KPSC	42.2	195.0	2.7	513	7.1	6.0	11.4	34.8	1.0	0.7	10.8	0.14
Danah Al Safat Foodstuff Co KPSC	1.3	11.8	N.A	N.A	0.0	0.0	-25.3	N.A	0.6	1.5	N.A	0.00
<b>Technology</b>	16	447.0	N.A	N.A	-3.9	-3.9	-13.1	4.7	0.7	12	-7.4	0.05
Automated Systems Co KPSC	6.1	61.5	N.A	N.A	-3.9	-3.9	-13.1	N.A	0.5	1.7	-19.3	0.02
Osos Holding Group Co KSCP	10.0	95.0	0.0	1	-2.7	-2.6	-5.0	7.5	0.8	19	N.A	0.03

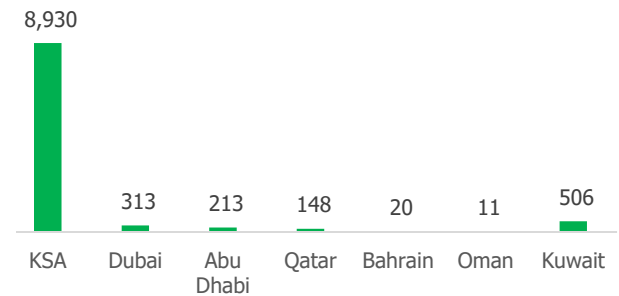
### GCC Markets Watch

Indicators	Last Close	WTD %	MTD %	YTD %	P/E TTM	P/B	Div. Yield
Kuwait All Share TR Index	6,164	2.3	3.2	-15.0	17.7	1.7	3.9
Saudi (TASI)	7,704	2.7	3.3	-8.2	17.9	1.9	N.A
Abu Dhabi (ADI)	4,387	0.6	1.9	-13.6	12.5	1.1	5.6
Dubai (DFMGI)	2,155	2.3	5.1	-22.0	6.7	0.7	4.5
Qatar(QE Index)	9,602	2.0	2.5	-7.9	14.8	1.3	4.2
Oman(Muscat SM)	3,565	-0.1	-0.1	-10.4	8.5	0.6	7.7
Bahrain (BAX)	1,311	1.7	1.6	-18.6	9.1	0.7	N.A
S&P GCC Composite	102	2.4	3.2	-11.9	14.8	2.0	3.4

### GCC Index Market Capitalization (USD bn)



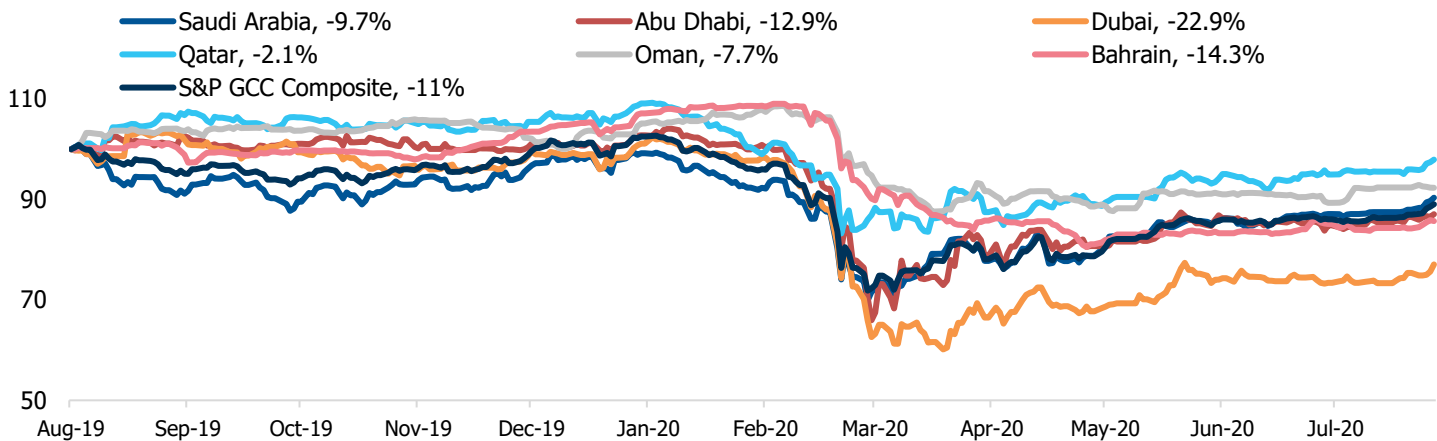
### GCC Weekly Traded Value (USD mn)



### GCC Blue Chip Watch

Companies	M.Cap (USD Bn)	Last	WTD (%)	MTD (%)	YTD (%)	PE (TTM)	PB (TTM)	DY	PAT(mn) Q2 2020	%Gr YoY
<b>Saudi Arabia</b>										
Saudi Aramco	1786.6	33.5	1.7	1.5	-5.0	27.5	6.5	N.A	24,621	-73.4
SABIC	71.0	88.8	1.1	-0.1	-5.4	220.8	1.6	4.2	N.A	N.A
STC	51.6	96.7	-0.3	-0.5	-5.0	18.1	3.1	4.1	2,724.2	-4.3
Al-Rajhi Bank	41.9	62.8	5.5	6.6	-4.0	16.0	3.0	4.8	2,436.1	-3.9
NCB	29.7	37.1	1.1	2.2	-24.7	10.4	1.5	6.3	2,088.0	-22.3
<b>UAE</b>										
Ad Natl Energy	40.7	1.3	0.0	0.0	155.3	N.A	4.4	0.0	85.1	-82.4
ETISALAT	39.4	16.6	-0.4	-0.1	1.6	16.4	3.2	4.8	2,387.8	7.0
First Abu Dhabi Bank	32.9	11.1	-0.4	1.5	-26.9	11.5	1.2	6.7	2,411.5	-25.1
Emirates NBD	16.8	9.8	4.3	10.3	-25.0	5.4	0.8	4.1	2,008.8	-57.6
Em Islamic Bk	11.6	7.8	0.0	0.0	-21.6	N.A	N.A	N.A	(143.1)	N.A
<b>Qatar</b>										
QNB	46.1	18.2	0.0	1.0	-11.7	13.0	1.9	3.3	2,824.2	-25.8
Industries Qatar	14.6	8.8	9.3	12.5	-14.4	33.3	1.7	4.6	281.5	-64.2
QA Islamic Bk	10.5	16.1	-0.2	0.2	5.2	13.4	1.8	3.3	739.0	-0.1
Ezdan Holding	10.2	1.4	-0.4	-1.8	126.7	238.7	1.2	0.0	54.4	63.3
Masraf Al Rayan	8.3	4.0	2.1	2.1	1.6	13.8	2.3	5.6	536.5	0.5

### GCC Market Performance Chart



Note: Kuwait Index has been excluded from the chart

## In News

- The Kuwaiti cabinet said on Thursday that it will start implementing the fourth stage of the gradual go-to-normality plan on August 18 and some activities that were set to open during the fifth stage including gyms, sport clubs, beauty salons and tailors will now be open as a part of the fourth stage.
- Kuwait has cut the official selling prices (OSPs) for crude grades sold to Asian refiners in September to 70 cents per barrel above the average of DME Oman and Platts Dubai quotes, down 35 cents from the previous month
- Kuwait Oil Company said on Wednesday it has contained and isolated the source of an oil leak that occurred on Tuesday night, located near Kilo 18 of the Seventh Ring Road.

## Financial News

- Mezzan Holding - H1 Profit rises to KD 8.1 million as against KD 7.3 million a year ago
- Commercial Bank Of Kuwait – H1 net profit down to KD 1.2 million as against KD 9.8 million a year ago
- Gulf Bank - H1 Profit down to KD 11.8 million as against KD 24 million a year ago
- Warba Bank - H1 loss of KD 14.9 million as against Profit of KD 6.5 million a year ago
- Ahli United Bank - H1 Profit down to KD 17.7 million as against KD 30.8 million a year ago
- Qurain Petrochemical Industries – Q2 Profit down to KD 2.4 million as against KD 4.8 million a year ago

## CONTACT DETAILS

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