

Kuwait Market Indices

Indicators	M. Cap (KD mn)	Last Close	% WTD	% MTD	% YTD	P/E	P/B
Kuwait All Share Index	33,738	6,885	5.1	5.1	-5.1	17.8	1.8
Main Market Index	8,518	5,232	3.1	3.1	-6.4	10.6	1.3
Premier Market Index	25,219	7,717	5.9	5.9	-4.7	20.1	1.9
Kuwait Islamic Index	13,322	80	5.7	5.7	-13.6	18.3	1.3

Note: TR denotes Total Return indices

Buzzing Stocks – Premier Market

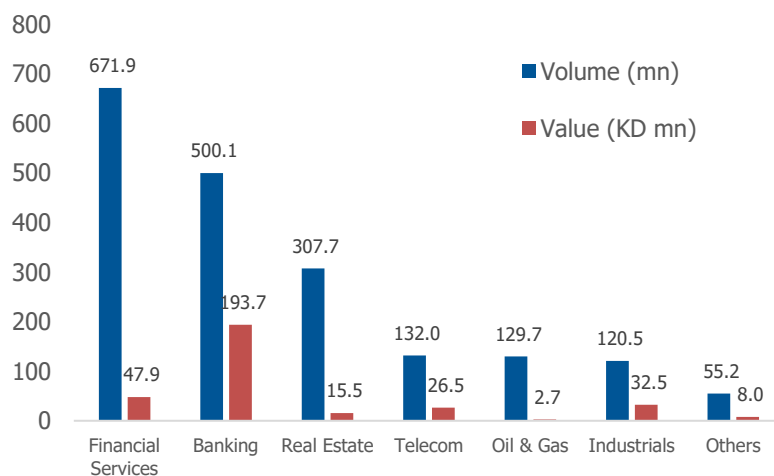
Company Name	Volume Increase
Integrated Holding Co KSCC	2.6x
Qurain Petrochemical Industries Company KSCP	2.2x
Kuwait International Bank KSCP	2.1x
National Industries Group Holding KPSC	1.8x
Burgan Bank KPSC	1.7x

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

Top Gainers

Company Name	M Cap (KD mn)	WTD %
Kuwait Cement Company KPSC	172.5	21.8
Palms Agro Production Co KSCP	4.1	20.9
Energy House Holding Company KSCP	17.6	19.3
Kuwait International Bank KSCP	249.5	18.3
Jiyad Holding Co KSCP	16.5	17.2

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)
Gulf National Holding K.S.C.C	170.0	6%	74,156	12,586
Ikarus Petroleum Industries Co.	51.0	0%	50,000	2,550
International Leasing And Investment Co.	1.5	50%	50,000	75
Refrigeration Industries And Storage Company	380.0	-16%	48,596	18,466
First Qatar Real Estate Development	15.0	25%	40,000	600

Buzzing Stock – Main Market

Company Name	Volume Increase
Bahrain Kuwait Insurance Co BSC	10.x
Al Kout Industrial Projects Company KPSC	10x
Al Bareeq Holding KSCP	8.9x
Energy House Holding Company KSCP	7.7x
Warba Capital Holding Co KSC	7.7x

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

Top Losers

Company Name	M Cap (KD mn)	WTD %
Gulf Insurance Group KSCP	113.3	-15.4
Dar Al Thuraya Real Estate Co KPSC	9.2	-13.6
Sanam Real Estate Company KSCP	3.9	-10.0
Future Kid Entertainment and Real Estate Company KSCP	8.4	-9.7
Bayan Investment Co KSCP	16.9	-8.3

Sector Liquidity

Sector	ADVT for the week (KD)	ADVT for the month (KD)	Weekly ADVT/Monthly ADVT	Sector Beta
Banks	38,747,603	30,290,295	1.2x	1.1
Financial Services	9,580,961	10,496,699	0.9x	0.8
Industrials	6,503,734	5,664,386	1.1x	1.0
Telecom	5,290,131	3,315,479	1.5x	0.9
Real estate	3,104,956	3,726,750	0.8x	0.7
Basic Materials	620,643	449,940	1.3x	0.7
Oil & Gas	546,242	456,237	1.1x	0.4
Consumer Services	487,771	476,597	1.0x	0.6
Consumer Goods	373,858	233,131	1.6x	0.4
Insurance	113,555	72,777	1.5x	0.1
Technology	-	17,605	0x	0.1
Healthcare	-	1,248	0x	0.0

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

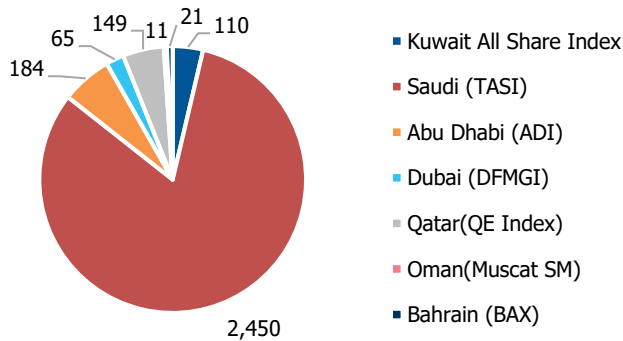
Kuwait Sector Performance & Valuation

Indicators	M. Cap (KD Mn)	Last Close	Volume (mn)	Value (KD mn)	% WTD	% MTD	% YTD	P/E	P/B	P/S	EV/EBITDA	% of Total M.Cap
Banking	19,845	1,344	500.1	193.7	5.7	5.7	-9.4	21.0	2.1	5.4	10.3	58.82
National Bank of Kuwait SAKP	6,199.5	904.0	44.9	40,238	3.9	3.9	-11.3	21.7	1.7	5.4	8.1	18.38
Kuwait Finance House KSCP	5,424.0	706.0	95.4	65,971	6.8	6.8	-4.2	27.1	2.9	5.9	13.9	16.08
Ahli United Bank BSC	2,377.6	249.0	79.3	19,456	6.4	6.4	-15.2	12.7	1.7	4.6	14.1	7.05
Telecommunications	3,420	1,114	132.0	26.5	6.0	6.0	-0.2	13.5	2.0	1.5	5.6	10.14
Mobile Telecommunications Company KSCP	2,659.8	614.0	41.4	24,769	7.0	7.0	2.3	13.1	2.2	1.6	6.1	7.88
National Mobile Telecommunications Co KSCP	315.5	626.0	0.4	218	4.0	4.0	-24.4	21.7	0.6	0.5	2.6	0.94
Kuwait Telecommunications Company KSCP	427.4	855.0	N.A	N.A	1.8	1.8	8.5	10.8	2.1	N.A	N.A	1.27
Industrials	3,030	848	120.5	32.5	6.3	6.3	-8.5	18.0	1.4	2.2	11.7	8.98
Agility Public Warehousing Co KSCP	1,429.3	705.0	21.5	14,850	7.3	7.3	-0.9	21.2	1.2	0.9	10.3	4.24
Human Soft Holding Company KSCP	329.9	2.69	1.9	5,238	3.7	3.7	-10.5	12.4	3.7	5.4	8.7	0.98
ALAFCO Aviation Lease and Finance Company KSCP	159.2	167.0	13.5	2,219	6.4	6.4	-38.6	26.7	0.5	1.4	11.2	0.47
Financial Services	2,593	938.0	671.9	47.9	3.5	3.5	-13.3	6.8	1.5	6.8	7.9	7.69
GFH Financial Group BSC	170.1	47.1	16.7	776	-3.9	-3.9	-31.6	0.3	0.6	1.7	21.2	0.50
Kuwait Projects Company Holding KSCP	322.4	161.0	11.1	1,738	6.6	6.6	-25.5	20.0	0.8	0.4	84.1	0.96
Egypt Kuwait Holding Co SAE	329.4	365.0	N.A	N.A	0.0	0.0	-18.9	11.2	2.2	2.0	8.3	0.98
Real Estate	2,106	979.0	307.7	15.5	3.7	3.7	-7.5	17.6	1.1	9.7	20.7	6.24
Mabanee Company KPSC	837.5	757.0	6.0	4,519	3.7	3.7	-11.3	28.2	1.8	11	28.7	2.48
Salhia Real Estate Co KSCP	208.9	407.0	2.3	941	1.8	1.8	-2.4	6.0	1.2	6.4	31.1	0.62
Tamdeen Real Estate Co KPSC	112.9	261.0	0.0	2	0.0	0.0	-18.7	N.A	0.7	6.5	230.8	0.33
Basic Materials	729	818	9.0	3.1	5.2	5.2	-9.9	19.4	1.2	3.0	7.0	2.16
Boubyan Petrochemical Company KSCP	309.5	578.0	1.8	1,026	5.1	5.1	-13.5	24.1	1.4	4.3	100.7	0.92
Qurain Petrochemical Industries Company KSCP	326.8	297.0	7.1	2,060	8.4	8.4	-4.2	11.8	0.7	1.4	10.8	0.97
Al-Kout Industrial Projects Company KPSC	73.8	731.0	0.0	1	-4.9	-4.9	-14.0	26.5	2.7	2.6	9.4	0.22
Healthcare	407	820	N.A	N.A	0.0	0.0	-7.3	51.8	6.2	4.6	22.7	1.21
Al-Maidan Clinic for Oral Health Services Company KSCP	305.3	1,220	N.A	N.A	0.0	0.0	0.0	58.6	7.6	5.9	26.4	0.91
Advanced Technology Co KSCP	89.6	597.0	N.A	N.A	0.0	0.0	-26.3	35.7	1.5	0.6	13.3	0.27
Yiaco Medical Company KPSC	12.1	707.0	N.A	N.A	0.0	0.0	0.1	N.A	6.6	0.4	N.A	0.04
Consumer Services	390	754	29.2	2.4	1.7	1.7	-29.7	13.5	1.9	2.0	12.6	1.16
Jazeera Airways Co KSCP	117.2	586.0	2.0	1,200	-0.7	-0.7	-46.7	N.A	4.5	1.4	13.0	0.35
Kuwait National Cinema Company KPSC	73.2	724.0	0.0	0	3.4	3.4	-30.9	29.3	0.9	4.9	8.6	0.22
IFA Hotels and Resorts Co KSCP	14.9	23.5	5.7	131	1.3	1.3	-57.3	N.A	1.7	0.4	N.A	0.04
Insurance	371	1,003	12.7	0.6	-4.3	-4.3	5.1	8.2	0.9	1.1	5.0	1.10
Gulf Insurance Group KSCP	113.3	605.0	0.2	123	-15.4	-15.4	-8.3	7.4	1.0	0.5	4.5	0.34
Al Ahleia Insurance Co SAKP	87.0	414.0	0.4	174	3.5	3.5	1.6	8.1	0.8	1.0	5.8	0.26
Kuwait Insurance Company SAKP	69.9	360.0	0.0	0	-0.3	-0.3	9.1	6.0	0.8	2.5	5.1	0.21
Oil & Gas	241	1,158	129.7	2.7	1.9	1.9	-6.5	10.6	1.7	2.1	8.1	0.72
Independent Petroleum Group KSCP	81.1	430.0	0.0	4	0.0	0.0	-10.8	11.3	0.8	0.1	8.8	0.24
National Petroleum Services Company KSCP	110.1	1,100	N.A	N.A	0.0	0.0	-6.0	12.3	2.9	3.5	7.7	0.33
Energy House Holding Company KSCP	17.6	23.5	18.4	433	19.3	19.3	3.1	N.A	0.8	4.1	N.A	0.05
Consumer Goods	234	764	4.3	1.9	-0.4	-0.4	19.8	28.0	1.6	0.8	11.1	0.69
Mezzan Holding Company KSCP	192.0	616.0	2.4	1,509	-1.1	-1.1	23.2	29.1	1.7	0.8	11.0	0.57
Livestock Transport and Trading Co KPSC	40.9	189.0	1.9	360	3.3	3.3	8.0	23.7	0.9	0.6	11.9	0.12
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
Technology	17	524.0	0.3	N.A	2.3	2.3	1.7	N.A	0.7	11	0.0	0.05
Automated Systems Co KPSC	7.2	72.0	0.3	24	2.3	2.3	1.7	N.A	0.6	2.1	N.A	0.02
Osos Holding Group Co KSCP	9.4	89.7	0.2	17	3.1	3.1	-10.3	N.A	0.8	19	N.A	0.03

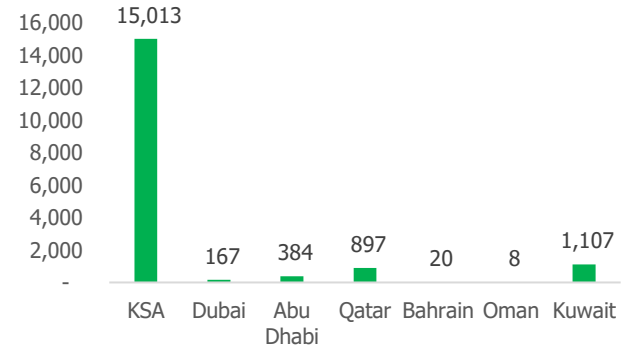
GCC Markets Watch

Indicators	Last Close	WTD %	MTD %	YTD %	P/E TTM	P/B	Div. Yield
Kuwait All Share TR Index	6,885	5.1	5.1	-5.1	17.8	1.8	3.0
Saudi (TASI)	8,413	1.4	1.4	0.3	19.0	2.1	N.A
Abu Dhabi (ADI)	4,513	0.5	-0.1	-11.1	12.9	1.1	5.6
Dubai (DFMGI)	2,214	-2.3	-2.6	-19.9	6.9	0.7	4.6
Qatar(QE Index)	10,032	0.3	0.4	-3.8	15.3	1.3	3.9
Oman(Muscat SM)	3,604	-0.3	-0.3	-9.5	8.4	0.6	8.0
Bahrain (BAX)	1,458	1.8	1.7	-9.4	9.1	0.7	N.A
S&P GCC Composite	110	1.8	1.8	-5.6	14.8	2.0	3.4

GCC Index Market Capitalization (USD bn)



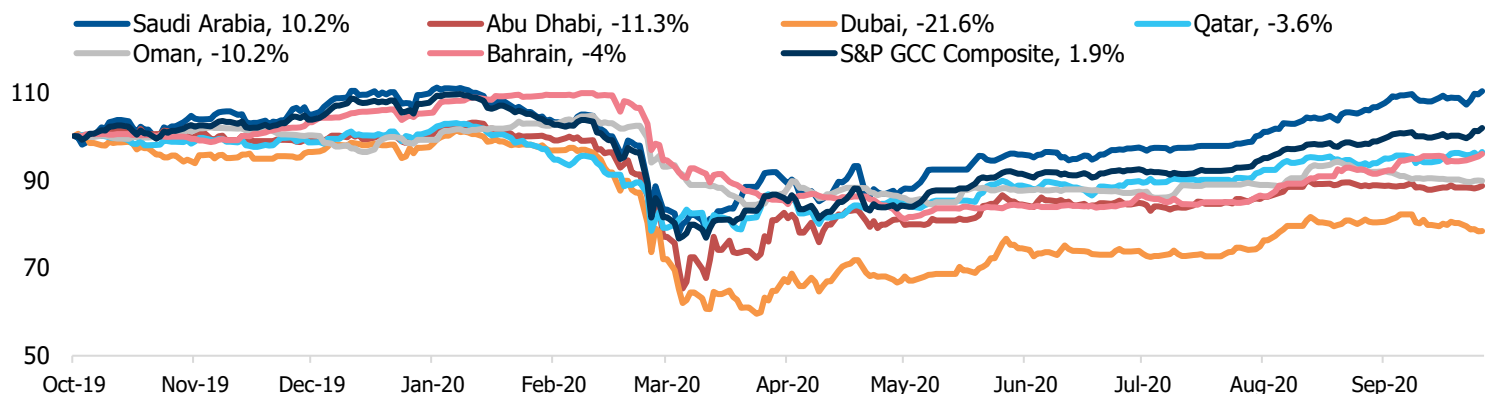
GCC Weekly Traded Value (USD mn)



GCC Blue Chip Watch

Companies	M.Cap (USD Bn)	Last	WTD (%)	MTD (%)	YTD (%)	PE (TTM)	PB (TTM)	DY	PAT(mn) Q2 2020	%Gr YoY
Saudi Arabia										
Saudi Aramco	1919.5	36.0	0.7	0.3	2.1	29.5	7.0	N.A	25,370.0	-72.7
SABIC	73.5	91.9	3.8	4.0	-2.1	N.A	1.7	4.0	(2,224.0)	-209.6
STC	55.5	104.0	3.2	3.6	2.2	19.4	3.3	3.9	2,724.2	-4.3
Al-Rajhi Bank	44.3	66.4	0.8	1.1	1.5	16.9	3.2	4.5	2,436.1	-3.9
NCB	30.8	38.5	3.4	3.6	-21.8	10.8	1.6	6.0	2,087.7	-22.3
UAE										
Ad Natl Energy	43.5	1.4	2.9	2.9	172.6	N.A	5.1	N.A	(205.0)	-198.6
ETISALAT	40.0	16.9	1.7	1.4	3.3	16.7	3.2	4.7	2,387.8	7.0
First Abu Dhabi Bank	33.2	11.2	0.2	-0.7	-26.4	11.6	1.3	6.6	2,411.5	-25.1
Emirates Nbd	18.1	10.5	0.0	-1.4	-19.2	5.8	0.8	3.8	2,008.8	-57.6
Em Islamic Bk	11.8	8.0	0.0	0.0	-19.9	108.6	5.2	N.A	(143.1)	-154.6
Qatar										
QNB	46.1	18.2	0.9	-0.2	-11.8	13.0	1.9	3.3	2,824.2	-25.8
Industries Qatar	16.5	9.9	0.4	0.9	-3.3	37.6	1.9	4.0	281.5	-64.2
Ezdan Holding	15.3	2.1	6.9	8.3	241.5	913.0	1.8	0.0	54.4	-63.3
Qa Islamic Bk	10.8	16.7	-0.6	0.9	8.6	13.8	1.9	3.2	739.0	-0.1
Masraf Al Rayan	8.6	4.2	1.3	0.9	6.0	14.4	2.4	5.4	536.5	0.5

GCC Market Performance Chart



Note: Kuwait Index has been excluded from the chart

In News

- Kuwait's new ruler Emir Sheikh Nawaf al-Ahmad al-Sabah has named Sheikh Meshal al-Ahmad al-Jaber al-Sabah as crown prince of Kuwait. The country's parliament has also endorsed Sheikh Meshal al-Ahmad as crown prince, after the new emir named him. The Emir has asked the cabinet to carry on its duties and prepare for parliamentary elections due this year after the prime minister handed in his government's resignation. According to Speaker Marzouq al-Ghanim, the parliament's term would end on October 8,2020.
- Kuwait's inflation rate in August rose by 2.18% y-o-y and 0.43% m-o-m. There were year-on-year increases in food and beverages (5.02%), cigarettes and tobacco (3.29%) and clothing and footwear (3.26%) sectors.
- The Central Bank of Kuwait (CBK) has approved the establishment of a Higher Committee of Shariah Supervision to underpin the governance of Shariah supervision and compliance in Islamic finance and banking institutions based on international best practices.
- Kuwait Petroleum Corporation (KPC) has agreed for a KD 1billion loan with National Bank of Kuwait (NBK) and Kuwait Finance House. NBK's share of KD 370million will be used to finance general capital expenditure. Gulf Bank has contributed about KD 60million to KPC's KD 1billion credit facility.
- Agility Public Warehousing has subscribed to 16.5million shares of Hylion at a value of KWD 12million through Colle Capital. The company is yet to receive a subscription confirmation nor a stock certificate.
- Ekttitab Holding has sold its 99% capital share of one of its subsidiaries 'Arabian Pen Educational Company' to a subsidiary of Al Madina for Finance and Investment, at a total value of KWD 450,000. The transaction will affect the income statement with a loss of around KWD 1.2 million.
- Independent Petroleum Group expects its net profit in Q3 2020 to about KD 1.1million.

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