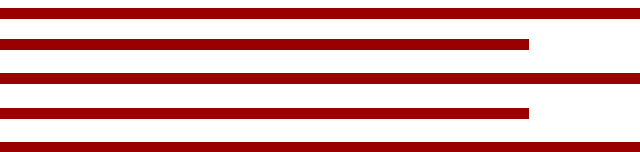


شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



## GCC DAILY MARKET WRAP

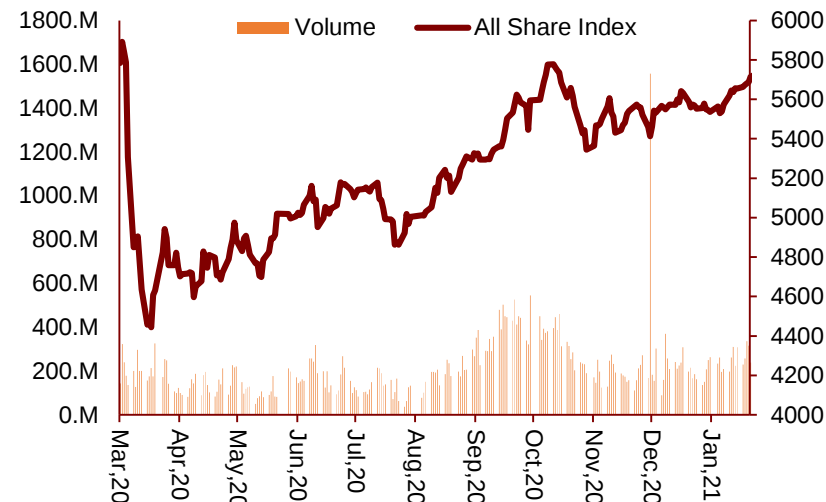
Monday, March 1, 2021



### Market Watch

| Description            | Close    | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|------------------------|----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>Kuwait</b>          |          | %     | %     | %     | %     | %     |               |      |       |
| Kuwait All Share Index | 5,685.77 | 0.65  | 0.65  | 0.65  | 2.52  | 2.52  | 33.06 KWD     | 1.81 | 20.24 |
| Kuwait Premier Index   | 6,200.61 | 0.70  | 0.70  | 0.70  | 2.47  | 2.47  | 24.02 KWD     | 1.95 | 19.50 |
| Kuwait Main Index      | 4,673.08 | 0.49  | 0.49  | 0.49  | 2.65  | 2.65  | 9.04 KWD      | 1.42 | 20.98 |
| NIC 50                 | 6,803.26 | 0.58  | 0.65  | 0.62  | 2.40  | 2.47  | 28.60 KWD     | 1.57 | 15.56 |
| <b>Kuwait Sector</b>   |          |       |       |       |       |       |               |      |       |
| Banking                | 1,282.31 | 0.63  | 0.63  | 0.63  | 1.57  | 1.57  | 18.96 KWD     | 1.94 | 20.50 |
| Telecom                | 1,150.85 | 0.32  | 0.32  | 0.32  | 4.40  | 4.40  | 3.53 KWD      | 1.92 | 21.61 |
| Industrials            | 902.68   | 1.62  | 1.62  | 1.62  | 1.30  | 1.30  | 3.22 KWD      | 1.49 | 16.84 |
| Financial services     | 991.67   | 0.18  | 0.18  | 0.18  | 6.66  | 6.66  | 2.54 KWD      | 0.99 | 21.12 |
| Real estate            | 1,005.66 | 0.92  | 0.92  | 0.92  | 5.57  | 5.57  | 2.16 KWD      | 1.12 | 19.75 |
| Basic materials        | 991.61   | 0.91  | 0.91  | 0.91  | 10.35 | 10.35 | 0.88 KWD      | 1.41 | 19.50 |
| Health care            | 812.06   | -0.14 | -0.14 | -0.14 | -1.76 | -1.76 | 0.40 KWD      | 5.77 | 19.50 |
| Consumer services      | 812.85   | 0.41  | 0.41  | 0.41  | -0.70 | -0.70 | 0.42 KWD      | 4.13 | 9.05  |
| Insurance              | 1,197.31 | 0.77  | 0.77  | 0.77  | 3.56  | 3.56  | 0.45 KWD      | 1.03 | 9.13  |
| Consumer goods         | 737.72   | 0.00  | 0.00  | 0.00  | -1.16 | -1.16 | 0.23 KWD      | 1.46 | 23.92 |
| Oil and Gas            | 1,249.36 | 0.57  | 0.57  | 0.57  | -2.19 | -2.19 | 0.26 KWD      | 1.31 | 11.31 |
| Technology             | 661.30   | 4.60  | 4.60  | 4.60  | 31.55 | 31.55 | 0.01 KWD      | 0.73 | 0.00  |

| Description              | Close     | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|--------------------------|-----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>GCC Markets</b>       |           | %     | %     | %     | %     | %     |               |      |       |
| Saudi (TASI)             | 9,138.37  | -0.07 | -0.61 | -0.07 | 5.17  | 5.17  | 9,113 SAR     | 5.86 | 29.78 |
| Qatar (QE Index)         | 10,210.26 | 0.63  | 0.89  | 0.63  | -2.16 | -2.16 | 531 QAR       | 1.64 | 12.50 |
| Dubai (DFMGI)            | 2,551.75  | 0.01  | 0.96  | 0.01  | 2.40  | 2.40  | 283 AED       | 1.25 | 15.18 |
| Abu Dhabi (ADI)          | 5,663.04  | -0.01 | 0.62  | -0.01 | 12.24 | 12.24 | 794 AED       | 4.43 | 15.17 |
| Bahrain (BAX)            | 1,472.33  | 0.40  | 0.53  | 0.40  | -1.17 | -1.17 | 15 BHD        | 1.30 | 16.56 |
| MUSCAT SE INDEX          | 3,622.12  | 0.27  | 0.56  | 0.27  | -1.00 | -1.00 | 4 OMR         | 0.78 | 12.27 |
| <b>Developed Markets</b> |           |       |       |       |       |       |               |      |       |
| MSCI World Index         | 2,726.91  | -1.21 | 0.00  | 0.04  | 1.37  | 1.37  |               |      |       |
| U.S. (S&P 500)           | 3,811.15  | 0.00  | -2.45 | 2.61  | 1.47  | 1.47  |               |      |       |
| U.K. (FTSE 100)          | 6,564.03  | 1.24  | 1.23  | 1.23  | 1.59  | 1.59  |               |      |       |
| Japan (Topix)            | 1,902.48  | 2.04  | 2.04  | 2.04  | 5.42  | 5.42  |               |      |       |
| <b>Emerging Markets</b>  |           |       |       |       |       |       |               |      |       |
| MSCI EM Index            | 1,339.26  | -3.22 | 0.00  | 0.00  | 3.72  | 3.72  |               |      |       |
| China (SSE Composite)    | 3,551.40  | 1.21  | 1.21  | 1.21  | 2.26  | 2.26  |               |      |       |
| India (Sensex)           | 49,849.84 | 1.53  | 1.69  | 1.69  | 4.56  | 4.56  |               |      |       |



### What Move the GCC markets ,

#### Oil Prices

Oil prices rose more than \$1 on Monday on optimism in the global economy thanks to progress in a huge U.S. stimulus package and on hopes for improving oil demand as vaccines are rolled out. **Brent crude futures for May rose 63 cents, or 0.98%, to \$65.05 per barrel.**

#### Kuwait Market

The market are closed today up by 0.65% , value traded 50.3 million KD, Premier market value traded reach 37.7 million KD and closed at 6,200 change by +0.70%, oil prices is above \$65 a barrel,

#### Saudi Market

The Market closed by -0.07%, today market Performance are linked to oil prices above \$65 a barrel and vaccine expected positive effect on overall economy .

# 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                         | 0.834  | 1.09  | 1.09  | 1.09  | -0.71  | -0.71  | 5.71 KWD      | 1.52 | 27.00 |
| KFH                         | 0.723  | 0.14  | 0.14  | 0.14  | 6.79   | 6.79   | 5.55 KWD      | 2.84 | 32.00 |
| Zain                        | 0.629  | 0.32  | 0.32  | 0.32  | 3.80   | 3.80   | 2.72 KWD      | 2.07 | 13.87 |
| BOUBAYAN BANK               | 0.565  | 2.36  | 2.36  | 2.36  | -0.53  | -0.53  | 1.71 KWD      | 2.88 | 34.00 |
| Agility                     | 0.678  | 2.73  | 2.73  | 2.73  | 0.30   | 0.30   | 1.37 KWD      | 1.16 | 22.03 |
| <b>Saudi Arabia</b>         |        |       |       |       |        |        |               |      |       |
| ARAMCO                      | 34.50  | 0.15  | -0.14 | 0.15  | -1.43  | -1.43  | 6,890.55 SAR  | 6.85 | 33.19 |
| SABIC                       | 104.20 | 0.77  | -2.25 | 0.77  | 2.76   | 2.76   | 310.22 SAR    | 1.85 | 35.00 |
| STC                         | 115.60 | -1.53 | -2.69 | -1.53 | 9.06   | 9.06   | 234.82 SAR    | 3.66 | 21.43 |
| AL-RAJHI BANK               | 87.30  | -2.35 | -4.07 | -2.35 | 18.61  | 18.61  | 223.52 SAR    | 3.85 | 21.47 |
| NCB                         | 48.30  | 2.22  | 2.77  | 2.22  | 11.42  | 11.42  | 141.76 SAR    | 1.78 | 12.79 |
| <b>United Arab Emirates</b> |        |       |       |       |        |        |               |      |       |
| ETISALAT.AD                 | 20.36  | 0.10  | 2.21  | 0.00  | 20.36  | 20.36  | 177.07 AED    | 3.61 | 19.60 |
| FAB.AD                      | 14.66  | -0.27 | -0.27 | -0.27 | 13.64  | 13.64  | 160.09 AED    | 1.47 | 15.83 |
| EMIRATES NBD                | 11.15  | 0.00  | -0.45 | 0.00  | 8.25   | 8.25   | 70.43 AED     | 0.83 | 11.15 |
| DB ISLAMIC BK               | 4.79   | 0.00  | 0.84  | 0.00  | 3.90   | 3.90   | 34.68 AED     | 0.85 | 12.61 |
| EMAAR PROPERT               | 3.57   | -0.28 | 2.29  | -0.28 | 1.13   | 1.13   | 25.56 AED     | 0.45 | 9.67  |
| <b>Qatar</b>                |        |       |       |       |        |        |               |      |       |
| QNB                         | 17.10  | 0.71  | -1.04 | 0.53  | -4.26  | -4.26  | 157.94 QAR    | 1.65 | 14.25 |
| INDUSTRIES QAT              | 11.80  | 1.99  | 1.99  | 1.90  | 8.46   | 8.46   | 71.39 QAR     | 2.11 | 35.45 |
| QA ISLAMIC BK               | 15.95  | 2.18  | 1.02  | 1.60  | -7.31  | -7.31  | 37.69 QAR     | 1.69 | 12.90 |
| MASRAF AL RAYA              | 4.37   | -0.66 | 1.15  | -0.32 | -3.20  | -3.20  | 32.78 QAR     | 2.28 | 15.16 |
| MESAIEED PETRO              | 1.91   | 1.11  | 1.38  | 1.11  | -6.89  | -6.89  | 23.95 QAR     | 1.54 | 23.02 |
| <b>OMAN</b>                 |        |       |       |       |        |        |               |      |       |
| BANK MUSCAT                 | 0.410  | 1.99  | 1.49  | 1.49  | 3.03   | 3.03   | 1.33 OMR      | 0.65 | 8.33  |
| OMANTEL                     | 0.760  | -1.04 | 3.78  | 0.00  | 6.08   | 6.08   | 0.58 OMR      | 1.04 | 7.69  |
| BANK DHOFAR                 | 0.103  | 0.00  | 0.00  | 0.00  | 6.19   | 6.19   | 0.31 QAR      | 0.44 | 14.93 |
| NAT BANK OF OMAN            | 0.131  | 0.77  | 1.55  | 0.77  | -18.12 | -18.12 | 0.21 QAR      | 0.40 | 12.71 |
| OMINVEST                    | 0.336  | 0.00  | 1.82  | 0.00  | -0.59  | -0.59  | 0.27 QAR      | 1.05 | 6.85  |

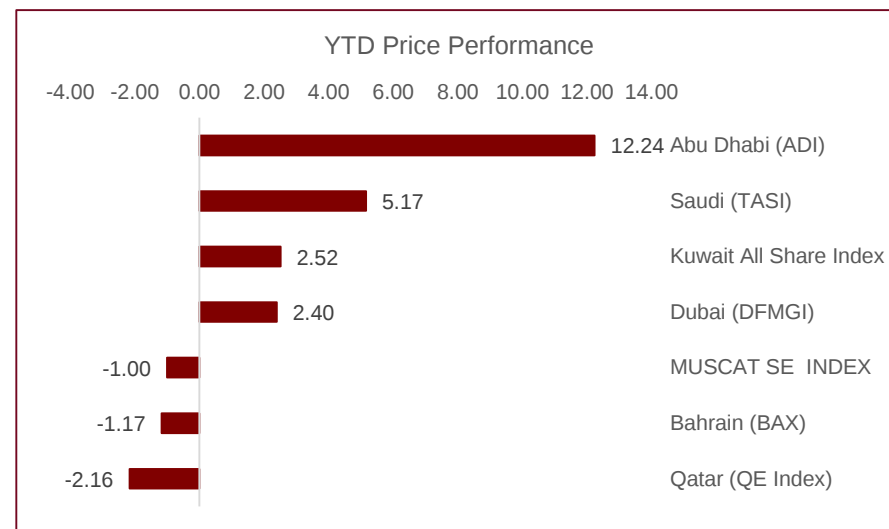
### Foreign Holdings

| Date      | NBK    | GBK    | CBK   | ABK   | MUTAHED | KIB   | BURG  | KFH    | BOUB  | WARBA |
|-----------|--------|--------|-------|-------|---------|-------|-------|--------|-------|-------|
| 17-Feb-21 | 19.81% | 12.52% | 0.06% | 1.07% | 0.30%   | 4.76% | 2.62% | 10.32% | 5.05% | 4.00% |
| 24-Feb-21 | 19.66% | 11.87% | 0.06% | 1.07% | 0.31%   | 4.64% | 2.61% | 10.30% | 5.02% | 4.00% |

### End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



### Leading Sector Performance

The market are up today by + 0.65 %The leading sector best performance indices today are Technology 4.6 % Industrials 1.62 % Real estate 0.92 % respectively.

from YTD performance perspective the best sector performance are Technology by 31.55 % while the bottom sector performance is Oil and Gas by -2.19 %.

Telecommunication sector are up today by + 0.32 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 1.88 %

### KSA

Saudi Armco are have positive performance today by + 0.15 %, SABIC have positive performance today by + 0.77 %.

STC are have negative performance today by -1.53 %, Al Rajhi Bank have negative performance today by -2.35 %.

### UAE

ETISALAT AD close 0.10% and act defensively with COVID19



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