



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



## GCC DAILY MARKET WRAP

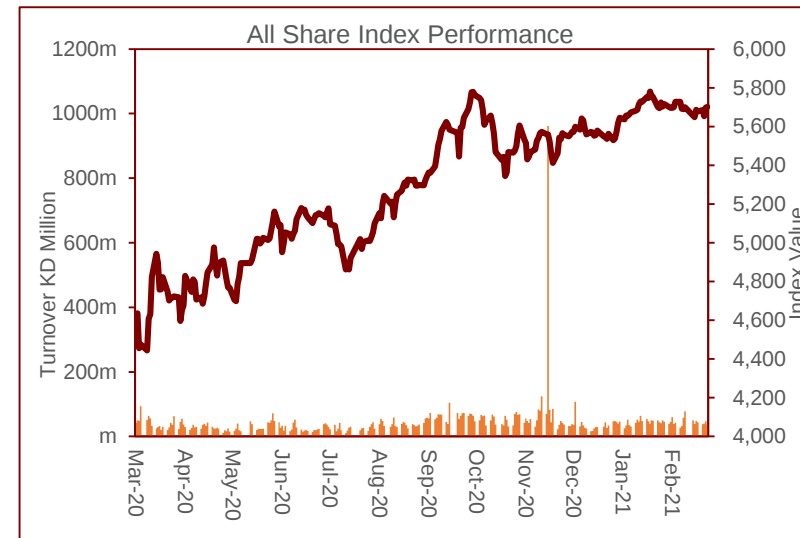
Wednesday, March 17, 2021



### Market Watch

| Description            | Close    | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|------------------------|----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>Kuwait</b>          |          | %     | %     | %     | %     | %     |               |      |       |
| Kuwait All Share Index | 5,797.41 | 0.41  | 0.97  | 2.62  | 4.53  | 4.53  | 34.09 KWD     | 1.91 | 26.91 |
| Kuwait Premier Index   | 6,353.33 | 0.42  | 1.21  | 3.18  | 5.00  | 5.00  | 25.76 KWD     | 2.05 | 28.01 |
| Kuwait Main Index      | 4,692.09 | 0.35  | 0.24  | 0.89  | 3.07  | 3.07  | 8.33 KWD      | 1.48 | 23.77 |
| NIC 50                 | 6,953.44 | 0.33  | 1.16  | 3.10  | 4.93  | 5.00  | 28.60 KWD     | 1.57 | 15.56 |
| <b>Kuwait Sector</b>   |          |       |       |       |       |       |               |      |       |
| Banking                | 1,318.42 | 0.33  | 1.02  | 3.46  | 4.43  | 4.43  | 19.45 KWD     | 1.34 | 29.01 |
| Telecom                | 1,142.92 | 0.73  | 0.89  | -0.37 | 3.68  | 3.68  | 3.50 KWD      | 0.60 | 14.14 |
| Industrials            | 919.10   | 0.58  | 2.92  | 3.47  | 3.14  | 3.14  | 3.28 KWD      | 0.68 | 10.02 |
| Financial services     | 987.19   | 0.91  | -0.01 | -0.27 | 6.18  | 6.18  | 2.54 KWD      | 0.64 | 6.19  |
| Real estate            | 1,015.32 | 0.01  | -0.02 | 1.89  | 6.58  | 6.58  | 2.18 KWD      | 0.50 | 38.87 |
| Basic materials        | 1,078.12 | 0.45  | 1.08  | 9.71  | 19.98 | 19.98 | 0.96 KWD      | 1.74 | 22.93 |
| Health care            | 810.88   | 0.00  | 0.00  | -0.29 | -1.91 | -1.91 | 0.40 KWD      | 5.28 | 40.51 |
| Consumer services      | 831.37   | 0.93  | 1.13  | 2.70  | 1.56  | 1.56  | 0.43 KWD      | 0.76 | 9.16  |
| Insurance              | 1,209.50 | 0.16  | -0.55 | 1.80  | 4.61  | 4.61  | 0.45 KWD      | 0.79 | 7.62  |
| Consumer goods         | 723.43   | -0.14 | -0.34 | -1.94 | -3.07 | -3.07 | 0.22 KWD      | 0.93 | 26.17 |
| Oil and Gas            | 1,218.39 | -1.50 | 0.53  | -1.92 | -4.61 | -4.61 | 0.25 KWD      | 0.69 | 5.66  |
| Technology             | 697.67   | 7.15  | 6.67  | 10.36 | 38.78 | 38.78 | 0.01 KWD      | 0.77 | 0.00  |
| Utilities              | 678.95   | 0.00  | -0.39 | 0.78  | -6.86 | -6.86 | 0.28 KWD      | 7.00 | 0.00  |

| Description              | Close     | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|--------------------------|-----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>GCC Markets</b>       |           | %     | %     | %     | %     | %     |               |      |       |
| Saudi (TASI)             | 9,602.24  | -0.60 | 0.15  | 5.00  | 10.50 | 10.50 | 9,484 SAR     | 2.38 | 19.84 |
| Qatar (QE Index)         | 10,211.39 | -0.81 | -0.13 | 0.64  | -2.15 | -2.15 | 530 QAR       | 1.48 | 18.45 |
| Dubai (DFMGI)            | 2,600.84  | -0.78 | 1.06  | 1.93  | 4.37  | 4.37  | 281 AED       | 1.82 | 15.26 |
| Abu Dhabi (ADI)          | 5,746.17  | -0.05 | 1.94  | 1.46  | 13.89 | 13.89 | 806 AED       | 1.48 | 19.37 |
| Bahrain (BAX)            | 1,459.41  | -0.45 | -0.67 | -0.48 | -2.04 | -2.04 | 15 BHD        | 1.36 | 11.17 |
| MUSCAT SE INDEX          | 3,738.01  | -0.13 | 0.99  | 3.48  | 2.17  | 2.17  | 5 OMR         | 0.78 | 13.25 |
| <b>Developed Markets</b> |           |       |       |       |       |       |               |      |       |
| MSCI World Index         | 2,823.69  | 0.07  | 0.59  | 3.55  | 4.97  | 4.97  |               |      |       |
| U.S. (S&P 500)           | 3,962.71  | -0.16 | 0.49  | 3.98  | 5.50  | 5.50  |               |      |       |
| U.K. (FTSE 100)          | 6,765.80  | -0.56 | 0.06  | 4.36  | 4.73  | 4.73  |               |      |       |
| Japan (Topix)            | 1,984.03  | 0.13  | 1.69  | 6.41  | 9.94  | 9.94  |               |      |       |
| <b>Emerging Markets</b>  |           |       |       |       |       |       |               |      |       |
| MSCI EM Index            | 1,349.07  | 0.66  | 0.06  | 0.73  | 4.48  | 4.48  |               |      |       |
| China (SSE Composite)    | 3,445.55  | -0.03 | -0.22 | -1.81 | -0.79 | -0.79 |               |      |       |
| India (Sensex)           | 49,801.62 | -1.12 | -2.05 | 1.33  | 4.19  | 4.19  |               |      |       |



### What Move the GCC markets ,

#### Oil Prices

Oil slipped for a fourth day on Wednesday as concerns about weaker demand in Europe outweighed an industry report that showed U.S. crude stockpiles unexpectedly fell last week. **Brent crude fell 77 cents, or 1.1%, to \$67.63 per a barrel,**

#### Kuwait Market

The market are closed today up by 0.35% , value traded 37.1 million KD, Premier market value traded reach 27.3 million KD and closed at 6,353 change by +0.42%, oil prices is above \$67 a barrel,

#### Saudi Market

The Market closed by -0.60%, today market Performance are linked to oil prices above \$67 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                         | 0.869  | 0.35  | 2.24  | 5.33  | 3.45   | 3.45   | 5.95 KWD      | 1.59 | 27.00 |
| KFH                         | 0.750  | 0.40  | 0.00  | 3.88  | 10.78  | 10.78  | 5.76 KWD      | 2.95 | 32.00 |
| Zain                        | 0.625  | 1.13  | 1.46  | -0.32 | 3.14   | 3.14   | 2.70 KWD      | 2.06 | 14.44 |
| BOUBYAN BANK                | 0.600  | 0.67  | 3.99  | 8.70  | 5.63   | 5.63   | 1.82 KWD      | 3.06 | 34.00 |
| Agility                     | 0.720  | 0.98  | 7.14  | 9.09  | 6.51   | 6.51   | 1.46 KWD      | 1.21 | 33.51 |
| <b>Saudi Arabia</b>         |        |       |       |       |        |        |               |      |       |
| ARAMCO                      | 35.50  | -0.56 | -1.11 | 3.05  | 1.43   | 1.43   | 7,139.62 SAR  | 7.10 | 34.29 |
| SABIC                       | 110.00 | -1.26 | 0.18  | 6.38  | 8.48   | 8.48   | 334.18 SAR    | 2.03 | 35.00 |
| STC                         | 116.00 | -2.52 | -2.19 | -1.19 | 9.43   | 9.43   | 237.99 SAR    | 3.71 | 21.43 |
| AL-RAJHI BANK               | 95.30  | -0.94 | -2.06 | 6.60  | 29.48  | 29.48  | 240.49 SAR    | 4.14 | 22.72 |
| NCB                         | 51.50  | -0.58 | -0.58 | 8.99  | 18.80  | 18.80  | 155.39 SAR    | 1.95 | 14.06 |
| <b>United Arab Emirates</b> |        |       |       |       |        |        |               |      |       |
| ETISALAT.AD                 | 21.14  | 0.96  | 2.92  | 3.93  | 25.09  | 25.09  | 183.85 AED    | 3.75 | 20.18 |
| FAB.AD                      | 14.68  | -0.14 | 2.37  | -0.14 | 13.80  | 13.80  | 160.31 AED    | 1.47 | 15.83 |
| EMIRATES NBD                | 11.60  | -0.85 | -0.43 | 4.04  | 12.62  | 12.62  | 73.27 AED     | 0.87 | 11.70 |
| DB ISLAMIC BK               | 4.78   | -0.42 | 1.49  | -0.21 | 3.69   | 3.69   | 34.61 AED     | 0.85 | 12.64 |
| EMAAR PROPERT               | 3.65   | -1.35 | 1.67  | 1.96  | 3.40   | 3.40   | 26.13 AED     | 0.46 | 10.12 |
| <b>Qatar</b>                |        |       |       |       |        |        |               |      |       |
| QNB                         | 17.32  | -1.03 | -0.06 | 2.00  | -2.86  | -2.86  | 159.97 QAR    | 1.67 | 14.69 |
| INDUSTRIES QAT              | 11.85  | -0.84 | -0.25 | 2.42  | 9.02   | 9.02   | 71.69 QAR     | 2.12 | 36.61 |
| QA ISLAMIC BK               | 15.90  | -1.36 | -1.18 | 1.92  | -7.01  | -7.01  | 37.57 QAR     | 1.68 | 13.32 |
| MASRAF AL RAYA              | 4.18   | -0.07 | -0.07 | -5.05 | -7.79  | -7.79  | 31.33 QAR     | 2.18 | 14.41 |
| MESAIEED PETRO              | 1.82   | -2.04 | -7.09 | -3.34 | -10.99 | -10.99 | 22.89 QAR     | 1.45 | 43.87 |
| <b>OMAN</b>                 |        |       |       |       |        |        |               |      |       |
| BANK MUSCAT                 | 0.436  | 0.46  | 3.32  | 8.46  | 10.10  | 10.10  | 1.42 OMR      | 0.69 | 8.33  |
| OMANTEL                     | 0.784  | 0.51  | 7.65  | 2.60  | 8.84   | 8.84   | 0.59 OMR      | 1.03 | 7.69  |
| BANK DHOFAR                 | 0.106  | 0.00  | -0.93 | 2.91  | 9.28   | 9.28   | 0.32 QAR      | 0.46 | 14.93 |
| NAT BANK OF OMAN            | 0.148  | 2.07  | 0.00  | 13.85 | -7.50  | -7.50  | 0.24 QAR      | 0.45 | 12.71 |
| OMINVEST                    | 0.316  | -1.25 | -3.05 | -5.36 | -5.92  | -5.92  | 0.26 QAR      | 0.99 | 6.85  |

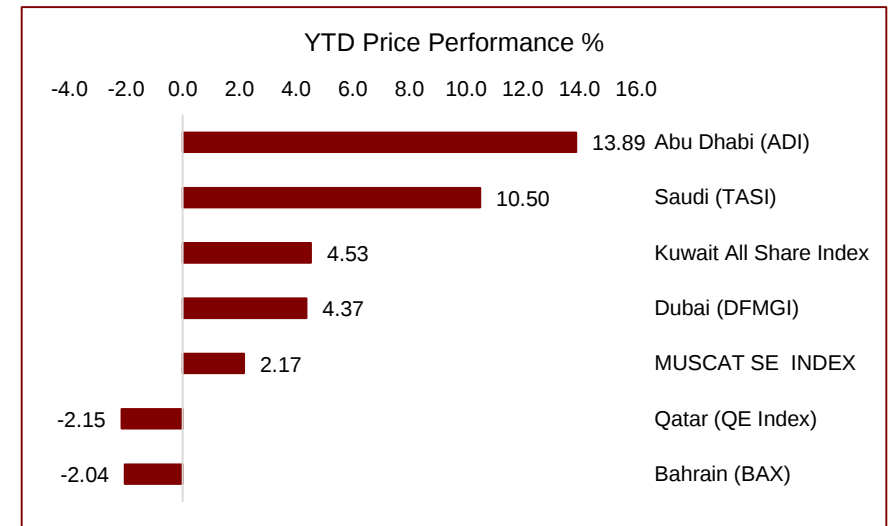
### Foreign Holdings

| Date      | NBK    | GBK    | CBK   | ABK   | MUTAHED | KIB   | BURG  | KFH    | BOUB  | WARBA |
|-----------|--------|--------|-------|-------|---------|-------|-------|--------|-------|-------|
| 3-Mar-21  | 19.51% | 11.86% | 0.06% | 1.04% | 0.31%   | 4.58% | 2.57% | 10.25% | 5.01% | 4.00% |
| 10-Mar-21 | 19.43% | 11.14% | 0.06% | 1.04% | 0.31%   | 4.61% | 2.59% | 10.21% | 4.98% | 4.05% |

### End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



### Leading Sector Performance

The market are up today by + 0.41 %The leading sector best performance indices today are Consumer services 0.93 % Financial services 0.91 % Telecom 0.73 % respectively.

from YTD performance perspective the best sector performance are Basic materials by 19.98 % while the bottom sector performance is Utilities by -6.86 %.

Telecommunication sector are up today by + 0.73 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-0.85 %.

### KSA

Saudi Armco are have negative performance today by -0.56 %, SABIC have negative performance today by -1.26 %.

STC are have negative performance today by -2.52 %, Al Rajhi Bank have negative performance today by -0.94 %.

### UAE

ETISALAT AD close 0.96% and act defensively with COVID19



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