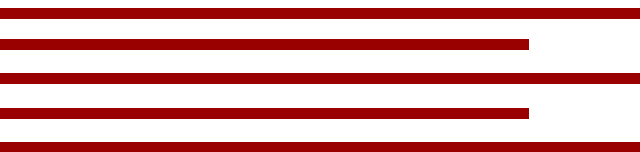


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

Monday, March 22, 2021

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

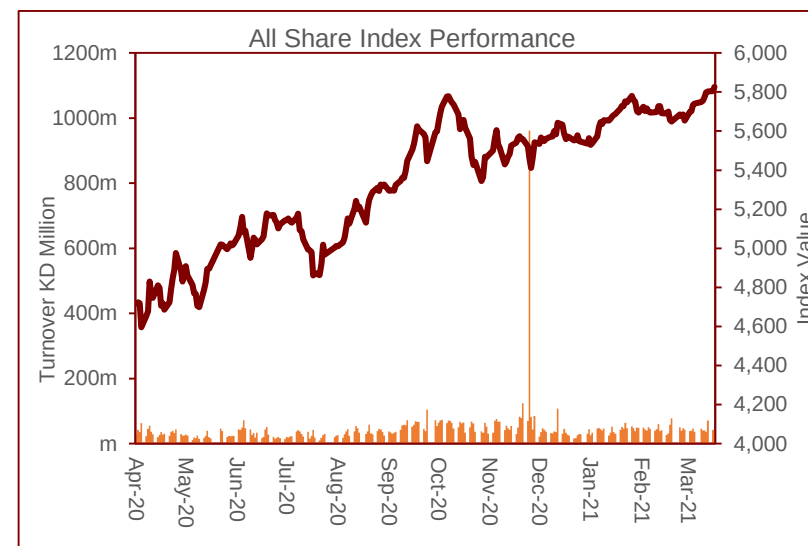


Market Watch

Monday, March 22, 2021

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,826.19	0.36	0.40	3.13	5.05	5.05	34.19 KWD	1.93	27.83
Kuwait Premier Index	6,385.16	0.29	0.32	3.70	5.52	5.52	25.87 KWD	2.06	28.30
Kuwait Main Index	4,714.68	0.58	0.68	1.38	3.56	3.56	8.32 KWD	1.48	26.66
NIC 50	6,994.16	0.46	0.27	3.62	5.45	5.52	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,328.67	0.54	0.47	4.27	5.24	5.24	19.56 KWD	1.32	29.30
Telecom	1,154.61	0.70	1.00	0.65	4.74	4.74	3.52 KWD	0.60	14.11
Industrials	917.89	-0.03	1.05	3.34	3.01	3.01	3.27 KWD	0.70	10.00
Financial services	991.22	0.07	0.28	0.14	6.62	6.62	2.55 KWD	0.63	6.19
Real estate	1,008.37	0.17	-0.54	1.19	5.85	5.85	2.17 KWD	0.49	42.49
Basic materials	1,071.51	-0.64	-1.02	9.04	19.24	19.24	0.96 KWD	1.73	23.02
Health care	809.19	-0.21	-0.21	-0.50	-2.11	-2.11	0.40 KWD	5.28	40.51
Consumer services	714.28	0.14	-1.82	-3.18	-4.30	-4.30	0.43 KWD	0.74	8.27
Insurance	1,205.71	-1.49	-1.18	1.48	4.28	4.28	0.46 KWD	0.82	7.97
Consumer Disc	830.67	0.04	0.22	2.62	1.47	1.47	0.22 KWD	0.93	25.68
Energy	1,226.27	0.34	-0.49	-1.29	-4.00	-4.00	0.25 KWD	0.70	5.47
Technology	577.64	-5.36	-3.17	-8.63	14.91	14.91	0.01 KWD	0.70	0.00
Utilities	678.95	0.00	0.39	0.78	-6.86	-6.86	0.28 KWD	6.98	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	9,547.42	0.51	0.65	4.40	9.87	9.87	9,342 SAR	2.37	19.82
Qatar (QE Index)	10,226.68	0.09	-1.13	0.42	-2.37	-2.37	530 QAR	1.50	18.61
Dubai (DFMGI)	2,551.96	-1.23	-2.00	0.02	2.41	2.41	280 AED	1.92	15.07
Abu Dhabi (ADI)	5,733.44	0.18	-0.04	1.23	13.64	13.64	804 AED	1.49	19.36
Bahrain (BAX)	1,470.61	0.32	0.69	0.29	-1.29	-1.29	15 BHD	1.37	11.11
MUSCAT SE INDEX	3,731.85	-0.05	-0.58	3.31	2.00	2.00	5 OMR	0.80	13.25
Developed Markets									
MSCI World Index	2,796.14	-0.22	0.00	2.54	3.94	3.94			
U.S. (S&P 500)	3,913.10	0.00	-0.77	2.68	4.18	4.18			
U.K. (FTSE 100)	6,724.01	0.23	0.23	3.72	4.08	4.08			
Japan (Topix)	1,990.18	-1.09	-1.09	6.74	10.28	10.28			
Emerging Markets									
MSCI EM Index	1,336.84	-0.78	0.00	-0.18	3.53	3.53			
China (SSE Composite)	3,443.44	1.14	1.14	-1.87	-0.85	-0.85			
India (Sensex)	49,771.29	-0.17	-0.17	1.37	4.23	4.23			



What Move the GCC markets ,

Oil Prices

Oil prices resumed their decline on Monday, falling around 1% as worries about a drop in demand for fuel products in the wake of yet more European lockdowns dominated trading. **Brent crude was down 12 cents, or 0.2%, at \$64.38 a barrel. U.S. oil was off by 12 cents, or 0.2%, at \$61.30 a barrel**

Kuwait Market

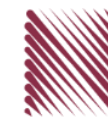
The market are closed today up by 0.36% , value traded 41.6 million KD, Premier market value traded reach 29.4 million KD and closed at 6,385 change by +0.29%, oil prices is above \$64 a barrel,

Saudi Market

The Market closed by +0.51%, today market Performance are linked to oil prices above \$64 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
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.867	0.00	-0.69	5.09	3.21	3.21	5.94 KWD	1.58	27.00
KFH	0.765	0.53	1.06	5.96	13.00	13.00	5.84 KWD	2.99	32.00
Zain	0.632	0.80	1.12	0.80	4.29	4.29	2.71 KWD	2.06	14.65
BOUBYAN BANK	0.609	0.83	0.83	10.33	7.22	7.22	1.83 KWD	3.08	34.00
Agility	0.718	0.42	2.57	8.79	6.21	6.21	1.45 KWD	1.20	33.60
Saudi Arabia									
ARAMCO	35.55	0.42	0.99	3.19	1.57	1.57	7,040.38 SAR	7.00	33.81
SABIC	109.00	0.74	-0.37	5.42	7.50	7.50	328.22 SAR	1.96	35.00
STC	116.60	1.92	1.75	-0.68	10.00	10.00	229.21 SAR	3.57	20.68
AL-RAJHI BANK	94.00	2.06	2.40	5.15	27.72	27.72	229.51 SAR	3.95	21.66
NCB	49.45	-1.10	-1.49	4.66	14.07	14.07	150.61 SAR	1.89	13.66
United Arab Emirates									
ETISALAT.AD	21.00	0.38	0.48	3.24	24.26	24.26	181.94 AED	3.71	20.16
FAB.AD	14.64	0.14	-0.41	-0.41	13.49	13.49	159.65 AED	1.47	15.74
EMIRATES NBD	11.20	-3.45	-5.08	0.45	8.74	8.74	73.27 AED	0.87	11.60
DB ISLAMIC BK	4.80	0.21	0.00	0.21	4.12	4.12	34.68 AED	0.85	12.61
EMAAR PROPERT	3.53	-0.84	-3.29	-1.40	0.00	0.00	25.49 AED	0.45	9.74
Qatar									
QNB	17.18	-1.04	-1.26	1.18	-3.65	-3.65	160.34 QAR	1.67	14.57
INDUSTRIES QAT	12.00	0.93	-0.83	3.72	10.40	10.40	71.93 QAR	2.13	36.43
QA ISLAMIC BK	16.10	-0.56	-0.62	3.14	-5.90	-5.90	38.26 QAR	1.72	13.38
MASRAF AL RAYA	4.17	0.24	0.12	-5.21	-7.95	-7.95	31.20 QAR	2.17	14.34
MESAIEED PETRO	1.83	2.81	0.22	-3.02	-10.70	-10.70	22.34 QAR	1.42	41.93
OMAN									
BANK MUSCAT	0.436	0.00	-0.46	7.96	9.60	9.60	1.42 OMR	0.69	8.33
OMANTEL	0.784	0.00	-0.51	2.08	8.29	8.29	0.59 OMR	1.02	7.69
BANK DHOFAR	0.109	2.83	1.87	5.83	12.37	12.37	0.32 QAR	0.46	14.93
NAT BANK OF OMAN	0.151	0.67	0.67	15.38	-6.25	-6.25	0.24 QAR	0.46	12.71
OMINVEST	0.320	1.27	0.00	-4.76	-5.33	-5.33	0.26 QAR	0.95	6.85

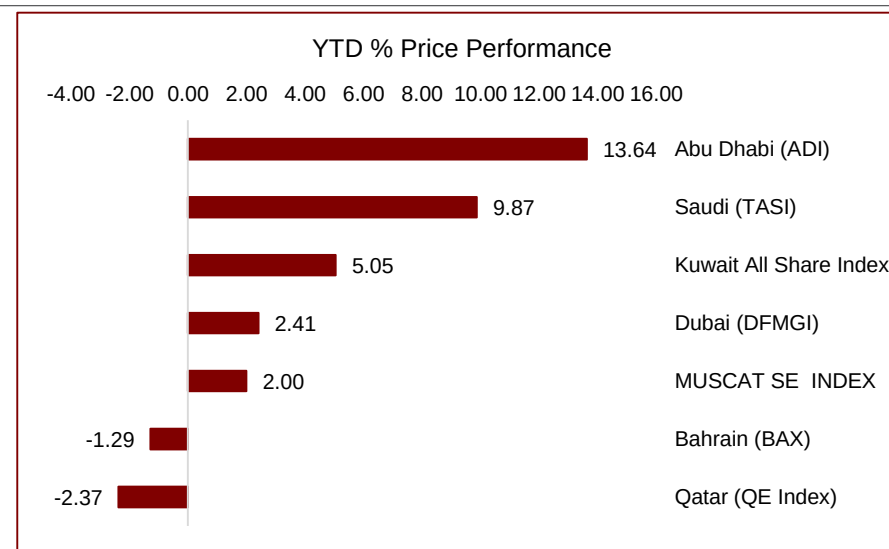
Foreign Holdings

Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
10-Mar-21	19.43%	11.14%	0.06%	1.04%	0.31%	4.61%	2.59%	10.21%	4.98%	4.05%
17-Mar-21	19.51%	11.58%	0.06%	1.04%	0.31%	4.61%	2.62%	10.24%	5.00%	4.09%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market are up today by + 0.36 %The leading sector best performance indices today are Banking 0.54 % Energy 0.34 % Real estate 0.17 % respectively.

from YTD performance perspective the best sector performance are Technology by 14.91 % while the bottom sector performance is Utilities by -6.86 %.

Telecommunication sector are up today by + 0.7 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-0.31 %.

KSA

Saudi Armco are have positive performance today by + 0.42 %, SABIC have positive performance today by + 0.74 %.

STC are have positive performance today by + 1.92 %, Al Rajhi Bank have positive performance today by + 2.06 %.

UAE

ETISALAT AD close 0.38% and act defensively with COVID19



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