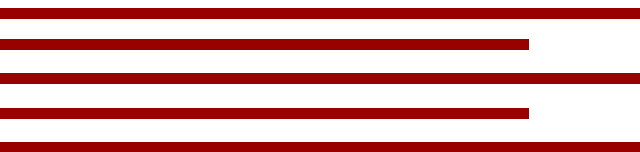


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

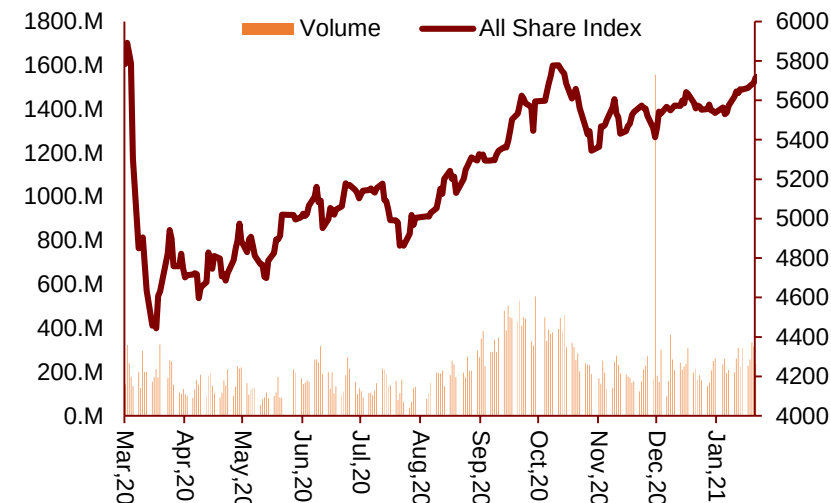
Tuesday, February 23, 2021



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,656.84	-0.75	-0.61	-2.13	2.00	2.00	33.14 KWD	1.79	17.75
Kuwait Premier Index	6,167.40	-0.94	-0.73	-2.23	1.92	1.92	24.10 KWD	1.96	19.50
Kuwait Main Index	4,653.17	-0.15	-0.21	-1.86	2.21	2.21	9.03 KWD	1.35	16.01
NIC 50	6,774.66	-0.96	-0.78	-2.30	1.85	1.92	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,276.06	-0.74	-0.49	-2.29	1.08	1.08	18.98 KWD	1.94	20.50
Telecom	1,136.94	-0.38	-0.53	-3.41	3.14	3.14	3.50 KWD	1.96	21.76
Industrials	906.77	-2.51	-2.61	-3.04	1.76	1.76	3.32 KWD	1.53	17.83
Financial services	984.53	-0.25	-0.39	1.25	5.90	5.90	2.54 KWD	0.98	21.12
Real estate	995.16	-0.65	0.36	-1.26	4.46	4.46	2.16 KWD	1.10	19.75
Basic materials	983.13	0.73	1.30	4.76	9.41	9.41	0.87 KWD	1.40	19.50
Health care	811.09	0.00	0.00	-0.61	-1.88	-1.88	0.40 KWD	5.76	19.50
Consumer services	806.56	-0.61	-1.68	-4.50	-1.47	-1.47	0.42 KWD	2.65	9.29
Insurance	1,209.65	0.99	1.50	-12.97	4.63	4.63	0.45 KWD	1.04	9.52
Consumer goods	740.70	-0.37	-0.97	-0.06	-0.76	-0.76	0.23 KWD	1.48	24.19
Oil and Gas	1,230.24	0.76	0.36	-0.67	-3.69	-3.69	0.25 KWD	1.32	10.90
Technology	632.20	2.23	-6.05	20.53	25.76	25.76	0.01 KWD	0.68	0.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	9,151.71	0.82	1.41	5.16	5.32	5.32	9,127 SAR	5.89	28.21
Qatar (QE Index)	10,020.04	-0.64	-2.47	-4.33	-3.99	-3.99	522 QAR	1.60	12.50
Dubai (DFMGI)	2,547.24	0.18	-1.13	-4.02	2.22	2.22	281 AED	1.25	14.69
Abu Dhabi (ADI)	5,670.93	0.17	0.50	1.38	12.40	12.40	791 AED	4.31	14.89
Bahrain (BAX)	1,460.46	-1.84	-1.41	-0.15	-1.97	-1.97	16 BHD	1.34	14.93
MUSCAT SE INDEX	3,574.59	0.38	0.25	-2.15	-2.30	-2.30	4 OMR	0.77	12.25
Developed Markets									
MSCI World Index	2,788.11	-0.65	-0.65	4.75	3.65	3.65			
U.S. (S&P 500)	3,876.50	0.00	-0.77	4.37	3.21	3.21			
U.K. (FTSE 100)	6,597.17	-0.23	-0.42	2.95	2.10	2.10			
Japan (Topix)	1,938.35	0.49	0.49	7.16	7.41	7.41			
Emerging Markets									
MSCI EM Index	1,397.67	-2.26	-2.26	5.12	8.24	8.24			
China (SSE Composite)	3,636.36	-0.17	-1.62	4.40	4.70	4.70			
India (Sensex)	49,751.41	0.01	-2.24	7.49	4.19	4.19			



What Move the GCC markets ,

Oil Prices

Oil prices gained more than 3% on Monday, driven by the expected slow return of U.S. crude output after last week's deep freeze in Texas shut in production. **Brent crude was up \$2.04, or 3.2%, at \$64.95 a barrel.**

Kuwait Market

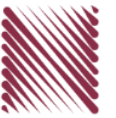
The market are closed today down by 0.75% , value traded 58.2 million KD, Premier market value traded reach 49.3 million KD and closed at 6,167 change by 0.94%, oil prices is above \$66 a barrel,

Saudi Market

The Market closed by +0.82%, today market Performance are linked to oil prices above \$63 a barrel and vaccine expected positive effect on overall economy .

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



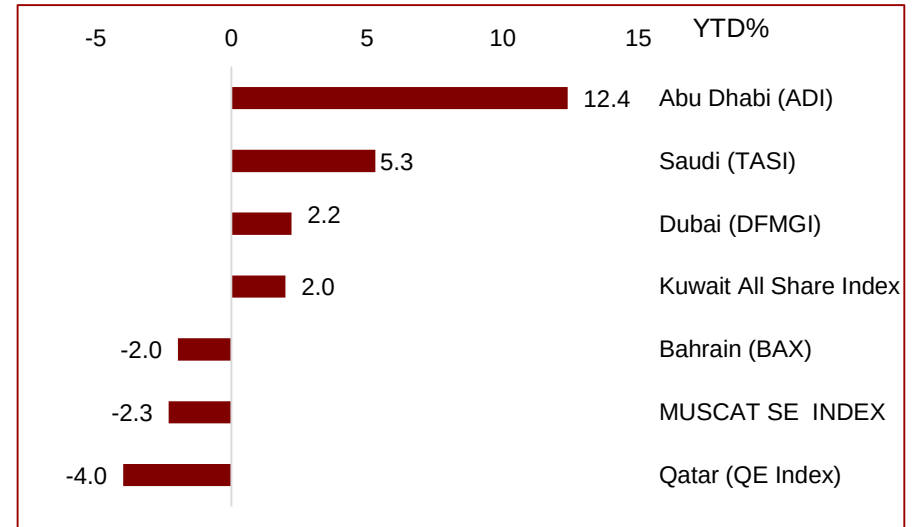
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.825	-0.60	-0.84	-5.50	-1.79	-1.79	5.69 KWD	1.52	27.00
KFH	0.723	-0.14	0.42	0.14	6.79	6.79	5.56 KWD	2.85	32.00
Zain	0.620	-0.16	-0.32	-3.12	2.31	2.31	2.69 KWD	2.11	13.74
BOUBYAN BANK	0.555	1.83	1.65	-2.80	-2.29	-2.29	1.65 KWD	2.78	34.00
Agility	0.694	-4.67	-4.54	-7.84	2.66	2.66	1.48 KWD	1.25	24.30
Saudi Arabia									
ARAMCO	34.70	0.29	-0.14	0.14	-0.86	-0.86	6,919.63 SAR	6.88	33.38
SABIC	105.00	0.96	2.94	4.17	3.55	3.55	311.98 SAR	1.86	35.00
STC	117.20	1.74	1.56	3.90	10.57	10.57	230.39 SAR	3.59	20.96
AL-RAJHI BANK	87.90	4.02	5.40	21.58	19.43	19.43	211.24 SAR	3.63	19.87
NCB	46.00	1.77	1.32	9.39	6.11	6.11	135.59 SAR	1.70	12.39
United Arab Emirates									
ETISALAT.AD	19.94	0.91	1.01	0.91	17.99	17.99	171.85 AED	3.67	18.96
FAB.AD	15.00	-0.40	0.67	1.49	16.28	16.28	164.46 AED	1.51	16.22
EMIRATES NBD	11.35	0.00	-0.87	-2.16	10.19	10.19	71.69 AED	0.85	11.35
DB ISLAMIC BK	4.77	-0.21	-0.42	-3.64	3.47	3.47	34.61 AED	0.85	12.59
EMAAR PROPERT	3.58	-0.83	-3.24	-4.02	1.42	1.42	25.85 AED	0.46	9.75
Qatar									
QNB	16.81	2.38	3.06	-5.92	-5.50	-5.50	151.60 QAR	1.58	13.78
INDUSTRIES QAT	11.51	-1.29	-2.97	-2.00	8.19	8.19	70.51 QAR	2.09	35.72
QA ISLAMIC BK	15.76	-3.43	-5.35	-4.54	-7.89	-7.89	38.55 QAR	1.73	13.48
MASRAF AL RAYA	4.23	0.31	-1.86	-2.76	-6.73	-6.73	31.58 QAR	2.20	14.52
MESAIEED PETRO	1.89	-0.68	-3.53	-4.99	-7.87	-7.87	23.85 QAR	1.53	23.19
OMAN									
BANK MUSCAT	0.400	0.50	0.50	0.00	1.01	1.01	1.30 OMR	0.63	8.33
OMANTEL	0.780	1.56	3.72	2.63	7.73	7.73	0.58 OMR	1.04	7.69
BANK DHOFAR	0.101	-0.98	-0.97	2.00	5.15	5.15	0.31 QAR	0.44	14.93
NAT BANK OF OMAN	0.130	-0.76	0.00	-5.11	-18.75	-18.75	0.21 QAR	0.40	12.71
OMINVEST	0.326	0.62	0.62	1.88	-3.55	-3.55	0.26 QAR	1.01	6.85

Foreign Holdings										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
10-Feb-21	20.01%	12.67%	0.06%	1.07%	0.28%	4.80%	2.84%	10.32%	5.09%	4.00%
17-Feb-21	19.81%	12.52%	0.06%	1.07%	0.30%	4.76%	2.62%	10.32%	5.05%	4.00%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market are down today by -0.75 %The leading sector bottom performance indices today are Industrials -2.51 % Banking -0.74 % Real estate -0.65 % respectively.

from YTD performance perspective the best sector performance are Technology by 25.76 % while the bottom sector performance is Oil and Gas by -3.69 %.

Telecommunication sector are down today by -0.38 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 1.14 %.

KSA

Saudi Armco are have positive performance today by + 0.29 %, SABIC have positive performance today by + 0.96 %

STC are have positive performance today by + 1.74 %, Al Rajhi Bank have positive performance today by + 4.02 %

UAE

ETISALAT AD close -0.7% and act defensively with COVID19



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