



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



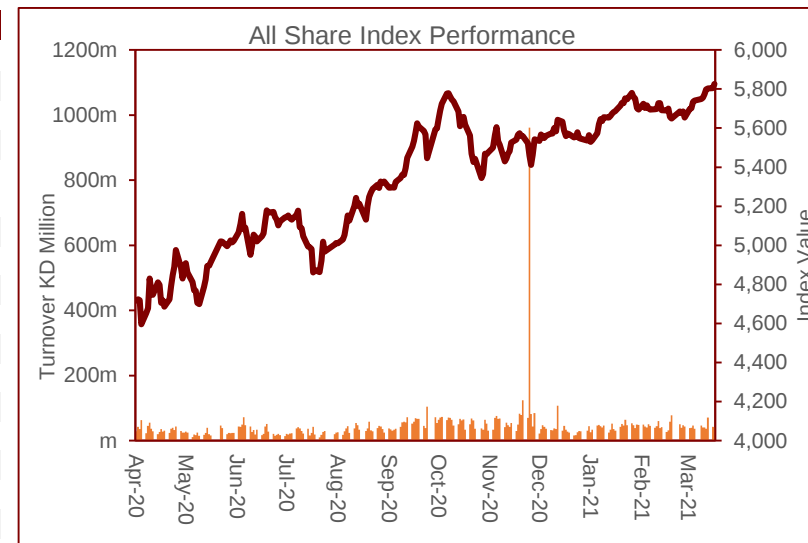
## GCC DAILY MARKET WRAP

Wednesday, March 24, 2021



### Market Watch

| Description            | Close    | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|------------------------|----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>Kuwait</b>          |          | %     | %     | %     | %     | %     |               |      |       |
| Kuwait All Share Index | 5,782.47 | -0.17 | -0.35 | 2.36  | 4.26  | 4.26  | 34.09 KWD     | 1.92 | 31.23 |
| Kuwait Premier Index   | 6,338.89 | -0.13 | -0.41 | 2.95  | 4.76  | 4.76  | 25.79 KWD     | 2.06 | 32.88 |
| Kuwait Main Index      | 4,675.42 | -0.31 | -0.16 | 0.54  | 2.70  | 2.70  | 8.30 KWD      | 1.49 | 26.40 |
| NIC 50                 | 6,969.75 | -0.11 | -0.46 | 2.87  | 4.69  | 4.76  | 28.60 KWD     | 1.57 | 15.56 |
| <b>Kuwait Sector</b>   |          |       |       |       |       |       |               |      |       |
| Banking                | 1,309.03 | -0.29 | -1.02 | 2.73  | 3.69  | 3.69  | 19.40 KWD     | 1.33 | 33.88 |
| Telecom                | 1,160.63 | 0.08  | 1.53  | 1.18  | 5.29  | 5.29  | 3.56 KWD      | 0.60 | 14.21 |
| Industrials            | 921.37   | 0.15  | 1.44  | 3.73  | 3.40  | 3.40  | 3.29 KWD      | 0.66 | 10.02 |
| Financial services     | 985.88   | -0.35 | -0.26 | -0.40 | 6.04  | 6.04  | 2.53 KWD      | 0.63 | 4.99  |
| Real estate            | 1,016.03 | 0.43  | 0.22  | 1.96  | 6.66  | 6.66  | 2.19 KWD      | 0.50 | 42.42 |
| Basic materials        | 1,078.60 | -0.08 | -0.37 | 9.76  | 20.03 | 20.03 | 0.96 KWD      | 1.76 | 22.93 |
| Health care            | 806.91   | -0.23 | -0.49 | -0.78 | -2.39 | -2.39 | 0.40 KWD      | 4.32 | 40.51 |
| Consumer services      | 711.86   | -0.54 | -2.15 | -3.51 | -4.62 | -4.62 | 0.43 KWD      | 0.74 | 10.83 |
| Insurance              | 1,188.80 | -2.24 | -2.56 | 0.05  | 2.82  | 2.82  | 0.45 KWD      | 0.80 | 7.97  |
| Consumer Disc          | 837.07   | 0.44  | 0.99  | 3.41  | 2.26  | 2.26  | 0.22 KWD      | 0.92 | 25.72 |
| Energy                 | 1,229.99 | 0.25  | -0.19 | -0.99 | -3.71 | -3.71 | 0.26 KWD      | 0.69 | 5.57  |
| Technology             | 610.37   | 0.00  | 2.32  | -3.45 | 21.42 | 21.42 | 0.01 KWD      | 0.70 | 0.00  |
| Utilities              | 676.32   | 0.00  | 0.00  | 0.39  | -7.22 | -7.22 | 0.28 KWD      | 6.98 | 0.00  |



### What Move the GCC markets ,

#### Oil Prices

Oil prices edged higher on Wednesday as investors looked for bargains following the previous day's plunge, but gains were capped as pandemic lockdowns in Europe and a build in U.S. crude stocks curbed risk appetite and raised oversupply fears. **Brent crude futures rose \$1.52, or 2.5%, to \$62.31 per barrel, after tumbling 5.9% and hitting a low of \$60.50 the previous day.**

#### Kuwait Market

The market are closed today down by -0.17% , value traded 29.2 million KD, Premier market value traded reach 19.8 million KD and closed at 6,338 change by -0.13%, oil prices is above \$62 a barrel,

#### Saudi Market

The Market closed by -0.27%, today market Performance are linked to oil prices above \$62 a barrel and vaccine expected positive effect on overall economy .

| Description              | Close     | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|--------------------------|-----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>GCC Markets</b>       |           | %     | %     | %     | %     | %     |               |      |       |
| Saudi (TASI)             | 9,464.08  | -0.27 | -0.23 | 3.49  | 8.91  | 8.91  | 9,320 SAR     | 2.36 | 20.47 |
| Qatar (QE Index)         | 10,213.13 | 0.19  | -0.89 | 0.66  | -2.14 | -2.14 | 530 QAR       | 1.51 | 18.29 |
| Dubai (DFMGI)            | 2,515.35  | -0.72 | -3.40 | -1.42 | 0.94  | 0.94  | 271 AED       | 1.87 | 14.74 |
| Abu Dhabi (ADI)          | 5,745.28  | 0.17  | 0.17  | 1.44  | 13.87 | 13.87 | 808 AED       | 1.50 | 19.63 |
| Bahrain (BAX)            | 1,464.44  | -0.08 | 0.27  | -0.14 | -1.70 | -1.70 | 15 BHD        | 1.36 | 11.06 |
| MUSCAT SE INDEX          | 3,712.63  | -0.63 | -1.09 | 2.78  | 1.47  | 1.47  | 5 OMR         | 0.80 | 13.25 |
| <b>Developed Markets</b> |           |       |       |       |       |       |               |      |       |
| MSCI World Index         | 2,788.01  | -0.77 | -0.29 | 2.24  | 3.64  | 3.64  |               |      |       |
| U.S. (S&P 500)           | 3,910.52  | -0.76 | -0.07 | 2.61  | 4.11  | 4.11  |               |      |       |
| U.K. (FTSE 100)          | 6,683.22  | -0.24 | -0.38 | 3.08  | 3.45  | 3.45  |               |      |       |
| Japan (Topix)            | 1,928.58  | -2.18 | -4.16 | 3.44  | 6.87  | 6.87  |               |      |       |
| <b>Emerging Markets</b>  |           |       |       |       |       |       |               |      |       |
| MSCI EM Index            | 1,323.77  | -0.94 | -0.98 | -1.16 | 2.52  | 2.52  |               |      |       |
| China (SSE Composite)    | 3,367.06  | -1.30 | -1.10 | -4.05 | -3.05 | -3.05 |               |      |       |
| India (Sensex)           | 49,180.31 | -1.74 | -1.36 | 0.16  | 2.99  | 2.99  |               |      |       |

# 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                         | 0.807  | -0.37 | -2.94 | 2.71  | 0.88  | 0.88  | 5.80 KWD      | 1.55 | 27.00 |
| KFH                         | 0.756  | -0.26 | -0.13 | 4.71  | 11.67 | 11.67 | 5.80 KWD      | 2.97 | 32.00 |
| Zain                        | 0.636  | 0.16  | 1.76  | 1.44  | 4.95  | 4.95  | 2.75 KWD      | 2.09 | 14.84 |
| BOUBAYAN BANK               | 0.607  | -0.98 | 0.50  | 9.96  | 6.87  | 6.87  | 1.84 KWD      | 3.10 | 34.00 |
| Agility                     | 0.736  | 1.24  | 5.14  | 11.52 | 8.88  | 8.88  | 1.49 KWD      | 1.23 | 34.16 |
| <b>Saudi Arabia</b>         |        |       |       |       |       |       |               |      |       |
| ARAMCO                      | 34.90  | -0.57 | -0.85 | 1.31  | -0.29 | -0.29 | 7,019.44 SAR  | 7.08 | 38.42 |
| SABIC                       | 108.00 | 0.37  | -1.28 | 4.45  | 6.51  | 6.51  | 322.77 SAR    | 1.93 | 35.00 |
| STC                         | 116.60 | 0.52  | 1.75  | -0.68 | 10.00 | 10.00 | 231.98 SAR    | 3.62 | 21.04 |
| AL-RAJHI BANK               | 93.50  | -0.11 | 1.85  | 4.59  | 27.04 | 27.04 | 233.98 SAR    | 4.03 | 22.18 |
| NCB                         | 48.60  | -0.82 | -3.19 | 2.86  | 12.11 | 12.11 | 146.99 SAR    | 1.85 | 13.45 |
| <b>United Arab Emirates</b> |        |       |       |       |       |       |               |      |       |
| ETISALAT.AD                 | 21.38  | 1.81  | 2.30  | 5.11  | 26.51 | 26.51 | 185.94 AED    | 3.79 | 20.23 |
| FAB.AD                      | 14.56  | -0.27 | -0.95 | -0.95 | 12.87 | 12.87 | 159.00 AED    | 1.46 | 15.72 |
| EMIRATES NBD                | 10.80  | -1.37 | -8.47 | -3.14 | 4.85  | 4.85  | 68.22 AED     | 0.81 | 10.95 |
| DB ISLAMIC BK               | 4.77   | -0.63 | -0.62 | -0.42 | 3.47  | 3.47  | 34.54 AED     | 0.85 | 12.64 |
| EMAAR PROPERT               | 3.46   | -1.14 | -5.21 | -3.35 | -1.98 | -1.98 | 24.77 AED     | 0.44 | 9.58  |
| <b>Qatar</b>                |        |       |       |       |       |       |               |      |       |
| QNB                         | 17.40  | 1.16  | 0.00  | 2.47  | -2.41 | -2.41 | 160.71 QAR    | 1.68 | 14.44 |
| INDUSTRIES QAT              | 11.85  | 0.00  | -2.07 | 2.42  | 9.02  | 9.02  | 71.69 QAR     | 2.12 | 36.31 |
| QA ISLAMIC BK               | 16.15  | 0.94  | -0.31 | 3.46  | -5.61 | -5.61 | 38.16 QAR     | 1.71 | 13.22 |
| MASRAF AL RAYA              | 4.16   | -0.07 | -0.07 | -5.39 | -8.12 | -8.12 | 31.22 QAR     | 2.17 | 14.36 |
| MESAIEED PETRO              | 1.85   | -0.59 | 1.43  | -1.86 | -9.62 | -9.62 | 23.24 QAR     | 1.48 | 43.89 |
| <b>OMAN</b>                 |        |       |       |       |       |       |               |      |       |
| BANK MUSCAT                 | 0.380  | -3.55 | -3.62 | 4.53  | 6.11  | 6.11  | 1.37 OMR      | 0.67 | 8.33  |
| OMANTEL                     | 0.776  | -1.02 | -1.02 | 1.56  | 7.73  | 7.73  | 0.59 OMR      | 1.02 | 7.69  |
| BANK DHOFAR                 | 0.107  | -1.84 | 0.00  | 3.88  | 10.31 | 10.31 | 0.32 QAR      | 0.46 | 14.93 |
| NAT BANK OF OMAN            | 0.148  | -1.33 | 1.34  | 16.15 | -5.62 | -5.62 | 0.25 QAR      | 0.46 | 12.71 |
| OMINVEST                    | 0.320  | 1.27  | -0.62 | -5.36 | -5.92 | -5.92 | 0.26 QAR      | 0.96 | 6.85  |

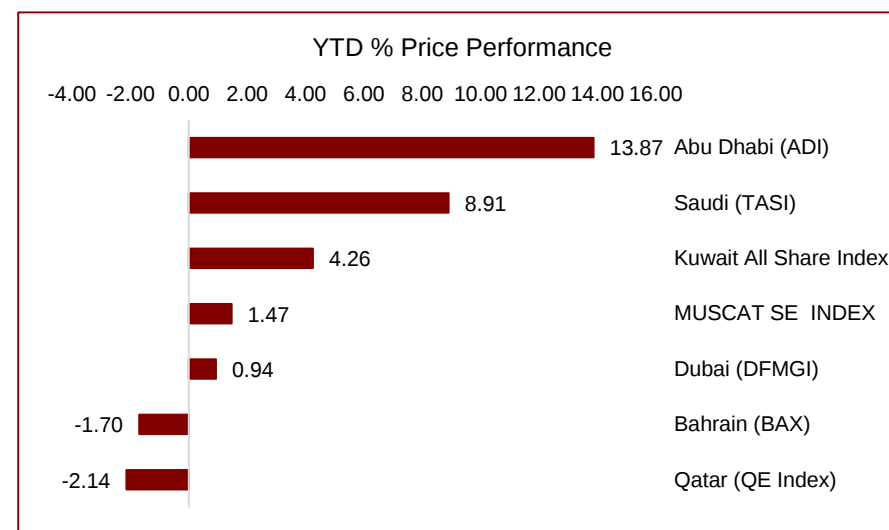
### Foreign Holdings

| 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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### Leading Sector Performance

The market are down today by -0.17 %The leading sector bottom performance indices today are Insurance -2.24 % Consumer services -0.54 % Financial services -0.35 % respectively.

from YTD performance perspective the best sector performance are Basic materials by 20.03 % while the bottom sector performance is Utilities by -7.22 %.

Telecommunication sector are up today by + 0.08 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 1.03 %.

### KSA

Saudi Armco are have negative performance today by -0.57 %, SABIC have positive performance today by + 0.37 %.

STC are have positive performance today by + 0.52 %, Al Rajhi Bank have negative performance today by -0.11 %

### UAE

ETISALAT AD close 1.81% and act defensively with COVID19



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