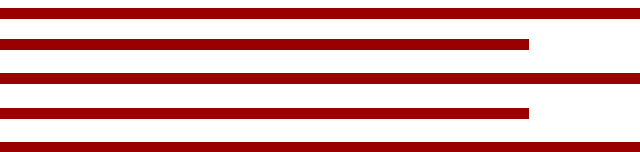


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

Monday, March 29, 2021

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

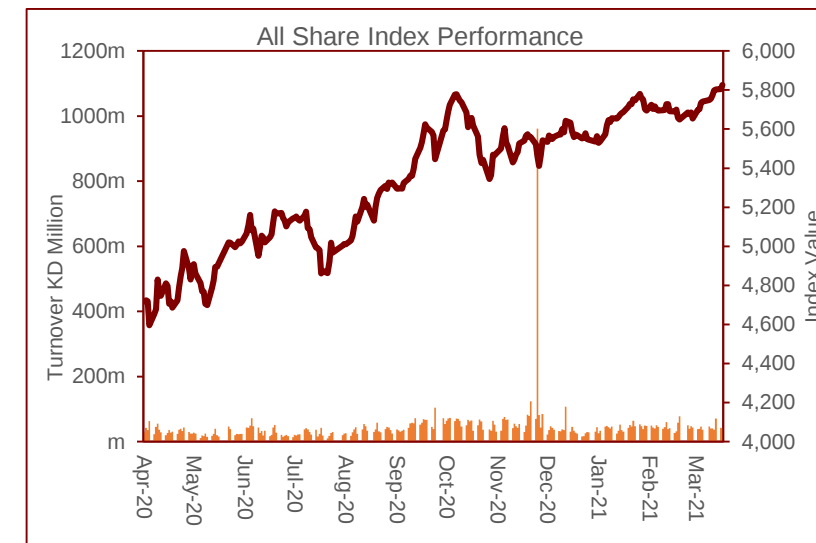


Market Watch

Monday, March 29, 2021

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,746.63	-0.23	-0.42	1.73	3.62	3.62	33.87 KWD	1.92	30.92
Kuwait Premier Index	6,290.31	-0.33	-0.67	1.98	3.78	3.78	25.58 KWD	2.05	32.47
Kuwait Main Index	4,668.26	0.06	-0.18	0.38	2.54	2.54	8.29 KWD	1.49	26.40
NIC 50	6,925.17	-0.30	-0.72	1.91	3.71	3.78	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,299.32	-0.36	-0.54	1.97	2.92	2.92	19.24 KWD	1.33	33.47
Telecom	1,153.12	-0.26	-0.41	0.52	4.61	4.61	3.54 KWD	0.58	14.22
Industrials	912.62	-0.38	-0.60	2.74	2.42	2.42	3.26 KWD	0.65	11.28
Financial services	978.94	-0.34	-0.27	-1.10	5.30	5.30	2.51 KWD	0.63	3.83
Real estate	1,013.87	-0.12	-0.57	1.75	6.43	6.43	2.18 KWD	0.50	41.85
Basic materials	1,079.60	0.55	0.47	9.86	20.14	20.14	0.96 KWD	1.73	22.74
Health care	810.23	0.19	0.41	-0.37	-1.99	-1.99	0.40 KWD	5.12	40.51
Consumer services	712.56	0.10	0.10	-3.41	-4.53	-4.53	0.43 KWD	0.73	10.88
Insurance	1,213.62	3.29	1.95	2.14	4.97	4.97	0.46 KWD	0.82	7.40
Consumer Disc	836.90	0.39	0.45	3.38	2.24	2.24	0.22 KWD	0.93	18.46
Energy	1,217.96	0.32	-0.81	-1.96	-4.65	-4.65	0.25 KWD	0.68	6.31
Technology	603.83	-1.07	-1.07	-4.49	20.12	20.12	0.01 KWD	0.69	0.00
Utilities	678.95	0.00	0.00	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
GCC Markets		%	%	%	%	%			
Saudi (TASI)	9,615.63	1.40	2.10	5.15	10.66	10.66	9,236 SAR	2.38	20.28
Qatar (QE Index)	10,323.98	1.30	1.53	1.75	-1.07	-1.07	538 QAR	1.52	18.50
Dubai (DFMGI)	2,552.60	2.10	2.29	0.04	2.43	2.43	276 AED	1.75	14.76
Abu Dhabi (ADI)	5,824.13	1.17	1.70	2.83	15.44	15.44	826 AED	1.57	19.55
Bahrain (BAX)	1,458.07	-0.99	-0.42	-0.57	-2.13	-2.13	15 BHD	1.33	11.05
MUSCAT SE INDEX	3,684.27	-0.45	0.16	1.99	0.70	0.70	5 OMR	0.79	13.25
Developed Markets									
MSCI World Index	2,814.86	1.43	0.00	3.23	4.64	4.64			
U.S. (S&P 500)	3,974.54	1.66	1.57	4.29	5.82	5.82			
U.K. (FTSE 100)	6,715.96	-0.37	-0.37	3.58	3.95	3.95			
Japan (Topix)	1,993.34	0.46	0.46	6.91	10.45	10.45			
Emerging Markets									
MSCI EM Index	1,307.48	1.48	0.00	-2.37	1.26	1.26			
China (SSE Composite)	3,435.30	0.50	0.50	-2.10	-1.09	-1.09			
India (Sensex)	49,008.50	1.17	-1.70	-0.19	2.63	2.63			



What Move the GCC markets ,

Oil Prices

Oil rose on Monday on expectations that the OPEC+ group of leading producers will keep output unchanged in May, and worries that operations in the Suez Canal might take weeks to return to normal even though a ship blocking it has been partly refloated. **Brent oil rose 58 cents, or 0.9%, to \$65.15 a barrel.**

Kuwait Market

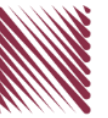
The market are closed today down by -0.23% , value traded 27.7 million KD, Premier market value traded reach 18.1 million KD and closed at 6,290 change by -0.33%, oil prices above \$65 a barrel,

Saudi Market

The Market closed by +1.4%, today market Performance are linked to oil prices above \$65 a barrel and vaccine expected positive effect on overall economy .

DAILY MARKETS WRAP,

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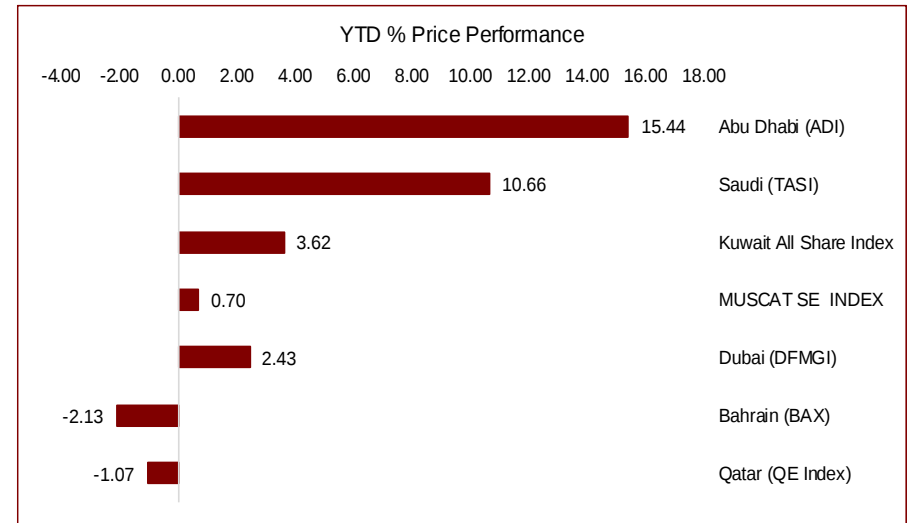
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.793	-0.50	-1.00	0.80	-1.00	-1.00	5.70 KWD	1.52	27.00
KFH	0.757	-0.26	-0.26	4.71	11.67	11.67	5.81 KWD	2.98	32.00
Zain	0.633	-0.31	-0.47	0.80	4.29	4.29	2.74 KWD	2.08	14.84
BOUBAYAN BANK	0.597	-1.00	-1.32	8.15	5.11	5.11	1.81 KWD	3.05	34.00
Agility	0.717	-1.10	-1.51	8.64	6.07	6.07	1.45 KWD	1.20	34.07
Saudi Arabia									
ARAMCO	35.15	1.44	1.01	2.03	0.43	0.43	6,929.08 SAR	6.99	37.61
SABIC	111.20	2.02	3.93	7.54	9.66	9.66	326.96 SAR	1.95	35.00
STC	120.00	1.69	3.99	2.21	13.21	13.21	235.97 SAR	3.68	20.82
AL-RAJHI BANK	94.90	1.50	2.04	6.15	28.94	28.94	233.72 SAR	4.02	21.94
NCB	50.20	3.61	4.47	6.24	15.80	15.80	145.33 SAR	1.82	13.07
United Arab Emirates									
ETISALAT.AD	21.00	2.44	0.96	3.24	24.26	24.26	182.63 AED	3.72	19.75
FAB.AD	14.42	0.14	-1.10	-1.90	11.78	11.78	157.47 AED	1.45	15.51
EMIRATES NBD	11.30	2.73	3.67	1.35	9.71	9.71	71.38 AED	0.84	11.00
DB ISLAMIC BK	4.54	-0.66	-0.66	-5.22	-1.52	-1.52	32.87 AED	0.81	12.03
EMAAR PROPERT	3.55	2.90	2.90	-0.84	0.57	0.57	25.42 AED	0.45	9.44
Qatar									
QNB	17.59	2.15	0.92	2.89	-2.02	-2.02	162.47 QAR	1.70	14.45
INDUSTRIES QAT	12.20	2.69	4.10	5.45	12.24	12.24	73.81 QAR	2.19	36.40
QA ISLAMIC BK	16.28	1.43	0.81	3.40	-5.67	-5.67	38.47 QAR	1.72	13.26
MASRAF AL RAYA	4.17	0.53	0.24	-5.21	-7.95	-7.95	31.28 QAR	2.18	14.30
MESAIEED PETRO	1.85	1.48	1.93	-1.86	-9.62	-9.62	23.24 QAR	1.48	43.00
OMAN									
BANK MUSCAT	0.384	2.13	3.23	5.07	6.67	6.67	1.38 OMR	0.68	8.33
OMANTEL	0.780	0.00	0.52	1.56	7.73	7.73	0.59 OMR	1.02	7.69
BANK DHOFAR	0.105	0.00	1.94	1.94	8.25	8.25	0.31 QAR	0.45	14.93
NAT BANK OF OMAN	0.148	0.00	0.00	13.85	-7.50	-7.50	0.24 QAR	0.45	12.71
OMINVEST	0.316	0.00	-0.63	-5.95	-6.51	-6.51	0.26 QAR	0.95	6.85

Foreign Holdings										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
17-Mar-21	19.51%	11.58%	0.06%	1.04%	0.31%	4.61%	2.62%	10.24%	5.00%	4.09%
24-Mar-21	19.62%	11.72%	0.06%	1.05%	0.32%	4.61%	2.61%	10.28%	5.00%	4.13%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market are down today by -0.23 %The leading sector bottom performance indices today are Technology -1.07 % Industrials -0.38 % Banking -0.36 % respectively.

from YTD performance perspective the best sector performance are Technology by 20.12 % while the bottom sector performance is Utilities by -6.86 %.

Telecommunication sector are down today by -0.26 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 0.99 %.

KSA

Saudi Armco are have positive performance today by + 1.44 %, SABIC have positive performance today by + 2.02 %.

STC are have positive performance today by + 1.69 %, Al Rajhi Bank have positive performance today by + 1.5 %.

UAE

ETISALAT AD close +2.44% and act defensively with COVID19



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