



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MARKET WRAP

Tuesday, March 30, 2021



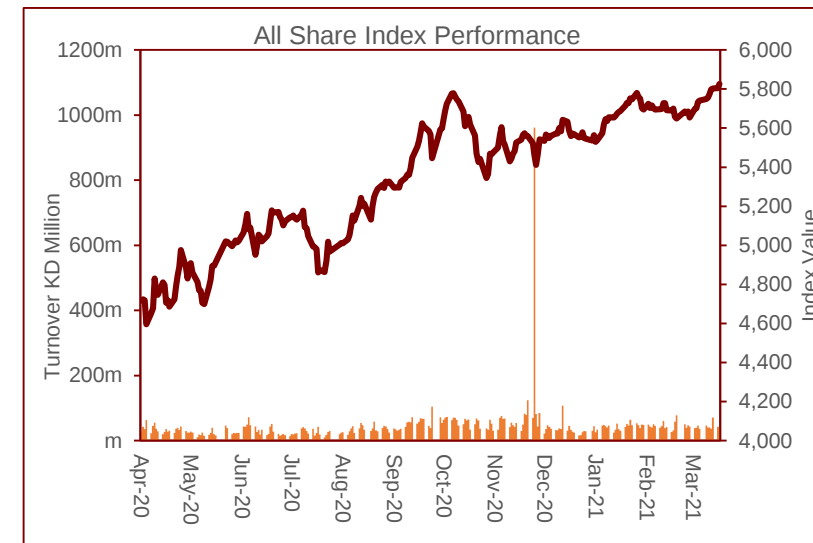
Market Watch

Tuesday, March 30, 2021

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	5,735.76	-0.19	-0.61	1.53	3.42	3.42	33.79 KWD	1.91	31.16
Kuwait Premier Index	6,268.94	-0.34	-0.92	1.73	3.52	3.52	25.47 KWD	2.04	32.74
Kuwait Main Index	4,681.69	0.29	0.11	0.67	2.84	2.84	8.32 KWD	1.50	26.52
NIC 50	6,951.71	0.38	-0.97	1.65	3.45	3.52	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,303.00	0.28	-0.26	2.25	3.21	3.21	19.27 KWD	1.33	33.74
Telecom	1,103.90	-4.27	-4.66	-3.77	0.14	0.14	3.38 KWD	0.58	14.30
Industrials	915.25	0.29	-0.31	3.04	2.71	2.71	3.27 KWD	0.67	11.29
Financial services	983.13	0.43	0.16	-0.68	5.75	5.75	2.53 KWD	0.63	3.83
Real estate	1,013.21	-0.07	-0.63	1.68	6.36	6.36	2.18 KWD	0.51	42.98
Basic materials	1,081.16	0.14	0.62	10.02	20.32	20.32	0.97 KWD	1.74	22.93
Health care	810.23	0.00	0.41	-0.37	-1.99	-1.99	0.40 KWD	5.12	40.51
Consumer services	708.78	-0.53	-0.43	-3.92	-5.04	-5.04	0.44 KWD	0.73	10.95
Insurance	1,221.83	0.68	2.64	2.83	5.68	5.68	0.46 KWD	0.83	7.91
Consumer Disc	845.14	0.98	1.44	4.40	3.24	3.24	0.22 KWD	0.92	27.80
Energy	1,220.63	0.22	-0.59	-1.74	-4.44	-4.44	0.25 KWD	0.69	6.31
Technology	603.83	0.00	-1.07	-4.49	20.12	20.12	0.01 KWD	0.69	0.00
Utilities	694.74	0.00	2.33	3.13	-4.69	-4.69	0.29 KWD	7.17	23.14

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	9,635.34	0.20	2.31	5.36	10.88	10.88	9,373 SAR	2.38	20.39
Qatar (QE Index)	10,381.30	0.56	2.10	2.32	-0.52	-0.52	541 QAR	1.52	18.39
Dubai (DFMGI)	2,558.50	0.23	2.52	0.27	2.67	2.67	277 AED	1.71	14.87
Abu Dhabi (ADI)	5,910.66	1.49	3.21	4.36	17.15	17.15	841 AED	1.58	19.60
Bahrain (BAX)	1,454.40	-0.25	-0.67	-0.82	-2.37	-2.37	15 BHD	1.31	11.03
MUSCAT SE INDEX	3,681.38	-0.08	0.08	1.91	0.62	0.62	5 OMR	0.79	13.25
Developed Markets									
MSCI World Index	2,811.53	-0.12	-0.12	3.10	4.52	4.52			
U.S. (S&P 500)	3,971.09	1.66	-0.09	4.20	5.72	5.72			
U.K. (FTSE 100)	6,739.46	0.05	-0.02	3.95	4.32	4.32			
Japan (Topix)	1,977.86	-0.78	-0.32	6.08	9.60	9.60			
Emerging Markets									
MSCI EM Index	1,310.11	0.20	0.20	-2.18	1.46	1.46			
China (SSE Composite)	3,456.68	0.62	1.12	-1.49	-0.47	-0.47			
India (Sensex)	50,136.58	2.30	2.30	2.11	5.00	5.00			

Sources, Bursa Kuwait , Refinitiv , NIC.



What Move the GCC markets ,

Oil Prices

Oil prices fell on Tuesday as the Suez Canal opened up after days closed by a grounded supercarrier and focus turned to an OPEC+ meeting this week where the extension of supply curbs may be on the table amid new coronavirus pandemic lockdowns. **Brent crude was down 15 cents, or 0.2%, at \$64.83 a barrel.**

Kuwait Market

The market are closed today down by -0.19% , value traded 37.1 million KD, Premier market value traded reach 26.5 million KD and closed at 6,268 change by -0.34%.

Saudi Market

The Market closed by +0.2%, 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



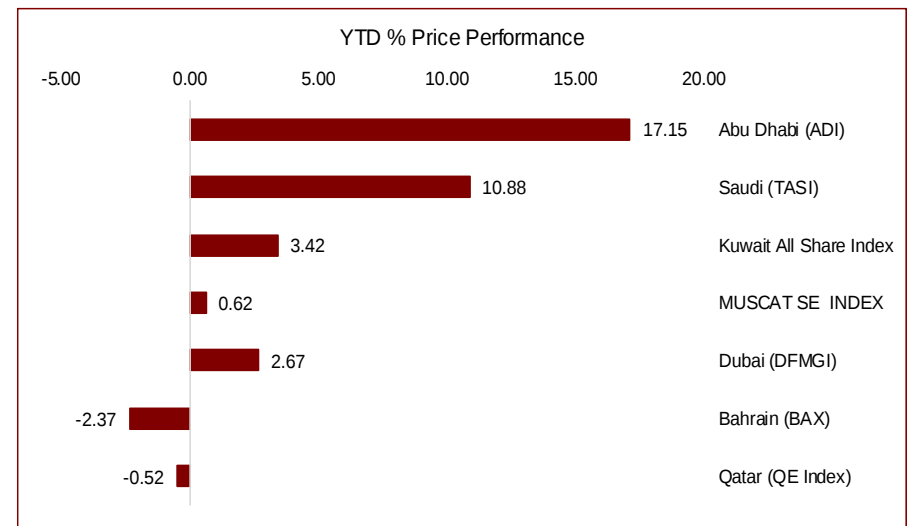
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.796	0.38	-0.50	1.31	-0.50	-0.50	5.73 KWD	1.53	27.00
KFH	0.756	-0.13	-0.40	4.57	11.52	11.52	5.80 KWD	2.97	32.00
Zain	0.598	-5.53	-5.83	-4.63	-1.32	-1.32	2.59 KWD	1.97	14.79
BOUBAYAN BANK	0.600	0.50	-0.83	8.70	5.63	5.63	1.82 KWD	3.06	34.00
Agility	0.719	0.28	-1.24	8.94	6.36	6.36	1.46 KWD	1.20	33.69
Saudi Arabia									
ARAMCO	35.05	-0.28	0.72	1.74	0.14	0.14	7,030.19 SAR	7.09	37.45
SABIC	111.20	0.00	3.93	7.54	9.66	9.66	333.61 SAR	1.99	35.00
STC	120.80	0.67	4.68	2.90	13.96	13.96	240.01 SAR	3.74	21.29
AL-RAJHI BANK	94.00	-0.95	1.08	5.15	27.72	27.72	237.26 SAR	4.08	22.06
NCB	50.50	0.60	5.10	6.88	16.49	16.49	150.60 SAR	1.89	13.18
United Arab Emirates									
ETISALAT.AD	21.60	2.86	3.85	6.19	27.81	27.81	187.85 AED	3.83	20.23
FAB.AD	14.60	1.25	0.14	-0.68	13.18	13.18	159.43 AED	1.47	15.53
EMIRATES NBD	11.50	1.77	5.50	3.14	11.65	11.65	72.64 AED	0.86	11.30
DB ISLAMIC BK	4.54	0.00	-0.66	-5.22	-1.52	-1.52	32.87 AED	0.81	11.95
EMAAR PROPERT	3.57	0.56	3.48	-0.28	1.13	1.13	25.56 AED	0.45	9.71
Qatar									
QNB	17.78	1.08	2.72	4.71	-0.28	-0.28	164.22 QAR	1.71	14.77
INDUSTRIES QAT	12.27	0.57	4.10	5.45	12.24	12.24	74.23 QAR	2.20	37.38
QA ISLAMIC BK	16.30	0.12	2.37	5.00	-4.21	-4.21	38.52 QAR	1.73	13.45
MASRAF AL RAYA	4.27	2.40	2.40	-3.16	-5.96	-5.96	32.03 QAR	2.23	14.37
MESAIEED PETRO	1.86	0.49	2.42	-1.38	-9.18	-9.18	23.35 QAR	1.48	43.63
OMAN									
BANK MUSCAT	0.386	0.00	3.76	5.62	7.22	7.22	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	2.91	2.91	9.28	9.28	0.32 QAR	0.46	14.93
NAT BANK OF OMAN	0.148	0.00	0.00	13.85	-7.50	-7.50	0.24 QAR	0.46	12.71
OMINVEST	0.320	1.27	-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 -0.19 %The leading sector bottom performance indices today are Telecom -4.27 % Consumer services -0.53 % Real estate -0.07 % respectively.

from YTD performance prespective the best sector performance are Technology by 20.12 % while the bottom sector performance is Consumer services by -5.04 %.

Telecommunication sector are down today by -4.27 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD prespective by-3.28 %.

KSA

Saudi Armco are have negative performance today by -0.28 %, SABIC flat performance today.

STC are have positive performance today by + 0.67 %, Al Rajhi Bank have negative performance today by -0.95 %.

UAE

ETISALAT AD close +2.86% and act defensively with COVID19



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