

شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, December 1, 2021

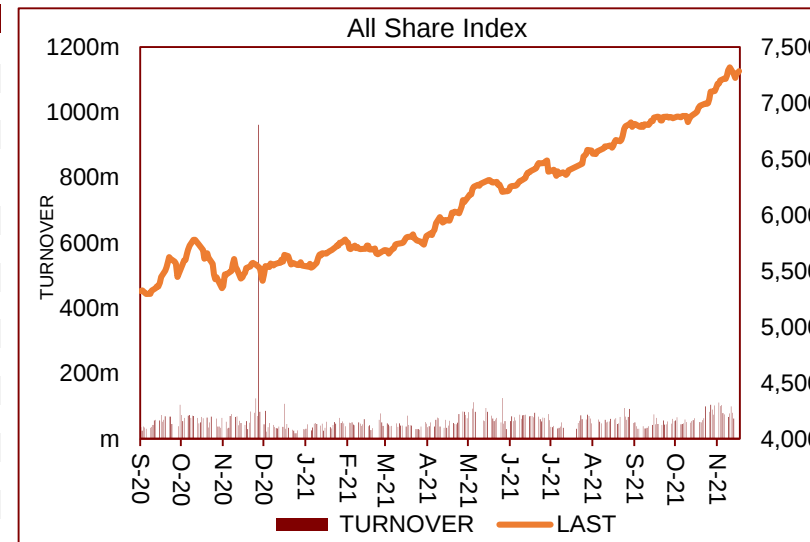




Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,929.40	2.05	-2.89	1.95	0.84	24.82	40.38 KWD	1.99	25.03
Kuwait Premier Index	7,520.67	2.39	-2.67	2.29	0.23	24.17	30.14 KWD	2.16	25.36
Kuwait Main Index	5,779.60	1.06	-3.41	1.06	2.86	26.96	10.24 KWD	1.49	24.15
NIC 50	8,852.99	0.44	-2.72	2.21	0.16	24.17	28.60 KWD	2.14	24.36
Kuwait Sector									
Banking	1,595.56	2.42	-2.21	2.42	1.23	26.39	23.24 KWD	1.24	26.36
Telecom	1,078.40	2.13	-1.13	2.13	-1.57	-2.17	3.24 KWD	0.95	14.93
Industrials	1,136.44	1.59	-4.84	1.59	-2.63	27.53	3.97 KWD	0.87	13.17
Financial services	1,382.74	2.45	-3.49	2.45	4.84	48.73	3.48 KWD	0.83	11.09
Real estate	1,306.51	1.06	-4.11	1.06	2.12	37.15	2.79 KWD	0.71	51.71
Basic materials	995.00	0.95	-6.45	0.95	-8.60	10.73	0.88 KWD	1.81	26.12
Health care	808.97	0.00	1.26	0.00	1.64	-2.14	0.40 KWD	6.25	12.15
Consumer services	732.82	0.00	-1.47	0.00	-6.47	-1.81	0.63 KWD	0.86	15.32
Insurance	1,585.27	-0.31	-0.56	-0.31	9.32	37.11	0.66 KWD	0.76	8.41
Consumer Disc	1,224.11	0.65	-8.39	0.65	9.57	49.54	0.22 KWD	1.35	8.91
Energy	1,373.66	-0.98	-5.55	-0.98	-0.23	7.54	0.29 KWD	0.96	15.07
Technology	742.05	0.00	-3.77	0.00	3.87	47.61	0.01 KWD	0.88	0.00
Utilities	615.79	0.00	-2.09	0.86	-1.27	-15.52	0.26 KWD	4.11	19.71

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,849.96	0.82	-3.95	0.85	-5.59	24.91	9,629 SAR	2.39	17.58
Qatar (QE Index)	11,552.42	1.46	-2.00	1.49	0.61	10.73	565 QAR	1.61	15.59
Dubai (DFMGI)	3,072.91	0.42	-3.07	7.29	7.99	23.31	309 AED	1.56	22.95
Abu Dhabi (ADI)	8,546.52	0.80	1.09	8.66	11.01	69.40	1,485 AED	1.85	23.15
Bahrain (BAX)	1,748.59	1.10	-1.72	1.10	2.52	17.37	18 BHD	1.56	9.73
MUSCAT SE INDEX	4,007.53	0.18	-2.69	0.18	1.65	9.53	5 OMR	0.86	13.25
Developed Markets									
MSCI World Index	3,101.80	-1.71	-0.96	0.00	3.17	15.31			
U.S. (S&P 500)	4,567.00	0.33	-0.60	-0.83	6.02	21.59			
U.K. (FTSE 100)	7,166.24	1.51	1.74	1.52	1.13	10.93			
Japan (Topix)	1,936.74	0.44	-2.43	0.44	-4.60	7.32			
Emerging Markets									
MSCI EM Index	1,212.42	-0.54	-0.88	0.00	-3.25	-6.11			
China (SSE Composite)	3,576.89	0.36	0.36	0.36	0.24	2.99			
India (Sensex)	57,684.79	1.09	1.01	1.09	-2.44	20.80			



What Move the GCC markets ,

Oil Prices

Oil prices rose more than 4% on Wednesday, still struggling to recoup losses of more than 16% in November, as major producers prepared to discuss how much of a threat the new Omicron variant of the coronavirus would pose to energy demand. Brent crude futures for February rose \$3.56, or 5.1%, to \$72.79 a barrel.

Kuwait Market

The market closed today up by + 2.05%, value traded 71.5 million KD, Premier market value traded reached 46.0 million KD and closed at 7,520.67 up by + 2.39%.

Saudi Market

The Market closed up by + 0.82%, with positive macroeconomic sentiments bounce of oil reaching \$72.29.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



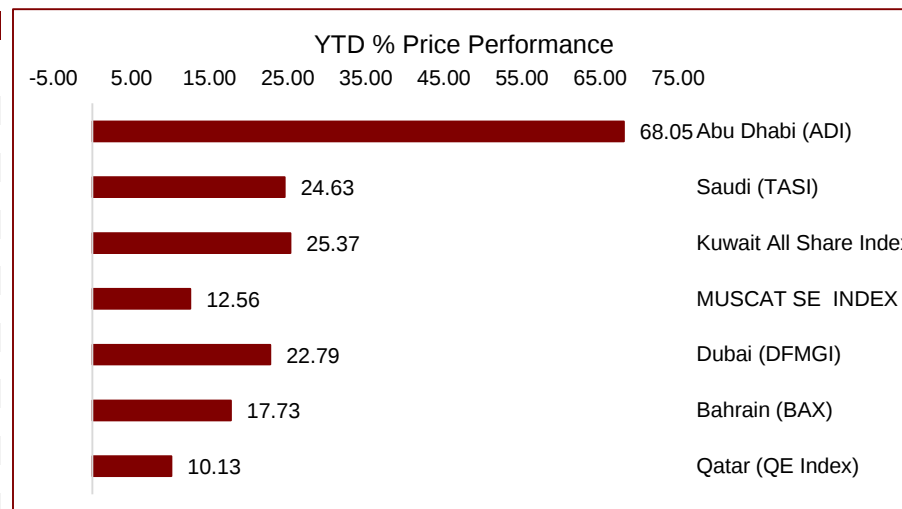
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.997	1.32	-1.97	1.32	4.62	24.63	7.08 KWD	1.82	27.00
KFH	0.810	2.27	-2.88	2.27	-1.46	31.61	6.68 KWD	3.08	32.00
Zain	0.585	2.81	-0.85	2.81	-2.34	-3.47	2.46 KWD	2.07	13.03
BOUBYAN BANK	0.776	2.37	-2.39	2.37	1.04	43.45	2.41 KWD	3.43	34.00
Agility	0.931	0.98	-6.62	0.98	-5.48	51.49	2.06 KWD	0.94	1.96
Saudi Arabia									
ARAMCO	35.00	1.01	-1.97	0.72	-3.06	-0.29	6,930.37 SAR	6.48	21.11
SABIC	109.20	0.92	-8.21	1.29	-13.97	8.09	324.62 SAR	1.87	35.00
STC	111.80	0.72	-1.06	0.72	-11.97	5.47	222.01 SAR	3.24	19.65
AL-RAJHI BANK	134.40	1.66	-4.95	1.66	9.62	82.61	330.52 SAR	5.19	24.36
NCB	61.40	1.66	-4.51	1.66	0.00	41.64	270.49 SAR	1.68	17.58
United Arab Emirates									
ETISALAT.AD	31.94	3.03	5.41	24.77	32.97	88.99	277.78 AED	6.03	29.21
FAB.AD	19.18	0.95	0.10	7.75	7.87	48.68	209.45 AED	1.92	17.07
EMIRATES NBD	13.20	3.13	0.38	-4.00	-7.04	28.16	83.38 AED	0.98	10.13
DB ISLAMIC BK	5.16	-2.82	-3.55	0.98	4.24	11.93	37.36 AED	0.98	14.16
EMAAR PROPERT	4.69	1.74	-4.48	16.09	14.95	32.86	38.36 AED	0.59	11.96
Qatar									
QNB	19.67	1.44	-4.95	0.98	2.25	9.81	177.88 QAR	1.79	15.21
INDUSTRIES QAT	14.65	0.90	-4.54	1.38	-4.72	35.42	87.25 QAR	2.35	13.19
QA ISLAMIC BK	17.58	2.21	-2.70	2.62	-3.29	3.16	40.37 QAR	1.70	12.83
MASRAF AL RAYA	4.99	2.89	4.06	2.99	11.52	10.26	36.13 QAR	2.45	16.34
MESAIEED PETRO	2.13	2.55	-3.53	2.55	-5.49	4.20	25.95 QAR	1.57	15.94
OMAN									
BANK MUSCAT	0.480	0.00	-4.35	2.11	7.56	34.44	1.71 OMR	0.82	8.33
OMANTEL	0.712	0.00	-4.30	1.71	-3.78	-1.66	0.53 OMR	0.95	7.69
BANK DHOFAR	0.128	-1.54	-5.93	-0.78	8.55	30.93	0.39 QAR	0.55	14.93
NAT BANK OF OMAN	0.192	0.00	0.00	0.00	3.78	20.00	0.31 QAR	0.57	12.71
OMINVEST	0.314	1.29	-0.64	0.00	-1.27	-8.28	0.25 QAR	0.91	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
17-Nov-21	20.92%	11.68%	0.06%	0.29%	0.41%	4.63%	2.76%	10.64%	5.28%	4.33%
24-Nov-21	20.96%	11.72%	0.06%	0.30%	0.42%	4.61%	2.76%	10.61%	5.30%	4.36%

End of Report

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Sources, Borsa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is up today by + 2.05 %The leading sector best performance indices today are Banking 2.42 % Telecom 2.13 % Industrials 1.59 % respectively

Telecommunication sector are up today by + 2.13 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-26.99 %

KSA

Saudi Armco has a positive performance today by + 1.01 %, SABIC have positive performance today by + 0.92 %

STC has a positive performance today by + 0.72 %, Al Rajhi Bank has a positive performance today by + 1.66 %

UAE

ETISALAT AD closed up today by + 3.03 %, and act defensively with COVID19



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