



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MORNING BRIEF

Monday, May 10, 2021

DAILY MARKETS WRAP,

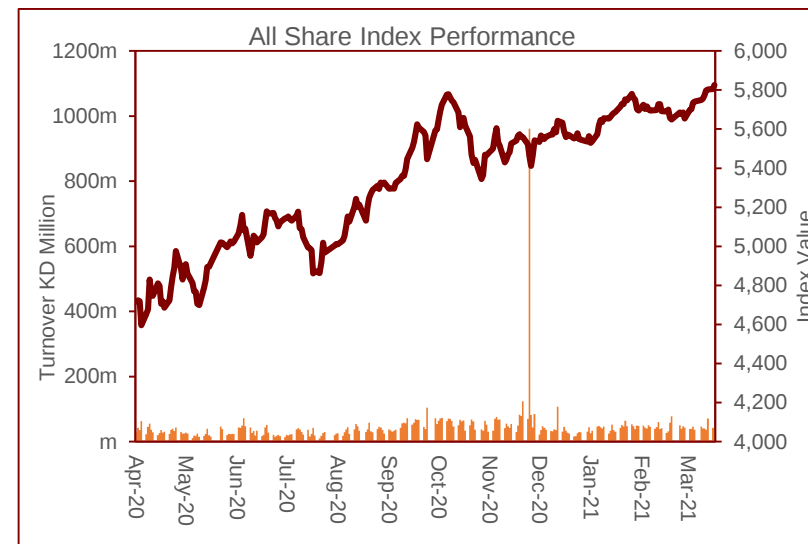
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Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,259.86	-0.13	0.15	2.43	8.42	12.91	36.83 KWD	2.02	38.27
Kuwait Premier Index	6,780.44	-0.20	-0.09	2.29	7.12	11.96	27.53 KWD	2.18	34.79
Kuwait Main Index	5,252.91	0.07	0.89	2.84	12.50	15.83	9.30 KWD	1.53	48.81
NIC 50	7,608.56	-90.20	-0.14	2.21	7.05	11.96	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1381.09	-0.18	0.0	1.37	5.09	9.41	20.39 KWD	1.39	35.79
Telecom	1104.77	0.26	0.4	0.11	-0.63	0.49	3.39 KWD	0.60	14.07
Industrials	1162.64	-0.13	-0.2	8.89	25.89	30.09	4.16 KWD	0.87	12.90
Financial services	1155.43	0.29	1.0	3.29	17.74	24.73	2.96 KWD	0.84	6.79
Real estate	1205.53	-0.54	0.4	4.67	18.32	26.29	2.59 KWD	0.72	51.75
Basic materials	1164.34	-0.35	-1.2	-1.63	6.40	28.96	1.04 KWD	1.88	10.09
Health care	792.94	0.09	0.0	-0.16	-2.24	-4.19	0.39 KWD	4.33	40.51
Consumer services	800.39	0.00	5.1	8.09	12.94	7.10	0.51 KWD	0.92	11.19
Insurance	1226.19	-0.96	0.2	-0.54	4.66	8.72	0.46 KWD	0.81	8.38
Consumer Disc	981.33	-0.75	-0.9	8.25	15.63	19.44	0.25 KWD	1.39	29.68
Energy	1361.64	0.83	2.5	4.53	11.51	6.96	0.28 KWD	0.96	14.46
Technology	742.05	3.03	1.9	-0.94	29.27	53.40	0.01 KWD	0.85	0.00
Utilities	665.79	-0.39	-0.8	-0.39	-5.22	-8.30	0.28 KWD	6.87	22.69

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,322.68	0.92	0.92	-0.92	4.19	18.79	9,695 SAR	2.53	21.65
Qatar (QE Index)	10,950.72	0.14	0.33	0.19	5.10	4.75	558 QAR	1.66	20.30
Dubai (DFMGI)	2,696.03	0.36	1.21	3.48	5.72	8.19	297 AED	1.50	31.24
Abu Dhabi (ADI)	6,209.43	-0.14	0.93	2.69	5.02	23.07	901 AED	1.67	17.88
Bahrain (BAX)	1,527.26	-0.17	0.21	2.70	4.59	2.36	16 BHD	1.33	9.70
MUSCAT SE INDEX	3,817.00	0.20	0.66	1.97	3.41	4.82	5 OMR	0.83	13.25
Developed Markets									
MSCI World Index	2,961.57	-0.60	-0.60	0.78	5.33	10.09			
U.S. (S&P 500)	4,188.43	-1.04	-1.04	0.17	5.43	11.51			
U.K. (FTSE 100)	7,123.68	-0.08	-2.35	-0.11	3.70	7.76			
Japan (Topix)	1,952.27	0.99	-1.40	0.40	-2.46	5.61			
Emerging Markets									
MSCI EM Index	1,346.35	-0.16	-0.16	-0.09	2.27	4.27			
China (SSE Composite)	3,427.99	0.27	0.66	-0.16	-0.01	-0.91			
India (Sensex)	49,502.41	0.60	-0.27	0.60	-0.88	2.77			



What Move the GCC markets ,

Oil Prices

Futures for fuel prices rose Monday, as much of one of the largest pipelines in the U.S. remains closed following a cybersecurity attack. International benchmark Brent crude traded at \$68.68 per barrel.

Kuwait Market

The market closed today down by 0.13%, value traded 55.9 million KD, Premier market value traded reached 24.5 million KD and closed at 6,780 change by 0.20%.

Saudi Market

The Market closed up by 0.92%, today market Performance is linked to oil prices raised to \$68.

DAILY MARKETS WRAP,

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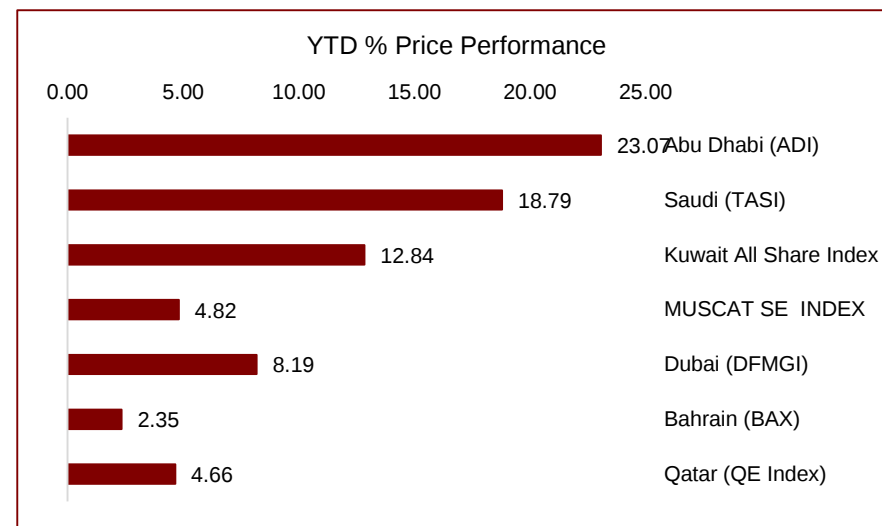
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.829	0.12	0.12	0.85	2.85	3.75	5.96 KWD	1.54	27.00
KFH	0.728	-0.14	0.00	0.55	4.13	18.12	6.15 KWD	3.27	32.00
Zain	0.602	0.33	0.33	0.00	-0.33	-0.49	2.61 KWD	1.98	14.07
BOUBAYAN BANK	0.659	-0.60	-1.20	0.61	14.37	21.82	2.10 KWD	3.44	34.00
Agility	1.068	-1.29	-2.23	11.18	45.18	55.92	2.17 KWD	1.79	50.19
Saudi Arabia									
ARAMCO	35.80	0.28	0.42	1.13	-0.56	2.29	7,160.00 SAR	7.08	35.62
SABIC	122.80	2.50	1.49	-0.97	4.60	21.10	368.40 SAR	2.15	35.00
STC	121.40	0.33	0.50	-4.41	-4.26	14.53	242.80 SAR	3.73	21.89
AL-RAJHI BANK	99.70	0.50	0.20	0.81	0.91	35.46	249.25 SAR	4.21	21.53
NCB	54.00	0.00	-1.82	-4.93	1.69	24.57	241.81 SAR	1.94	14.25
United Arab Emirates									
ETISALAT.AD	21.56	0.00	0.47	1.79	-0.37	27.57	187.51 AED	4.20	20.39
FAB.AD	14.58	-0.82	0.28	2.39	-0.14	13.02	159.22 AED	1.55	15.62
EMIRATES NBD	12.60	1.20	1.20	1.20	9.57	22.33	79.59 AED	0.96	12.02
DB ISLAMIC BK	4.55	0.22	1.34	2.25	0.00	-1.30	32.95 AED	0.91	13.27
EMAAR PROPERT	4.00	0.00	2.30	7.24	12.99	13.31	28.64 AED	0.52	10.94
Qatar									
QNB	18.09	0.56	0.61	1.12	0.61	1.51	167.04 QAR	1.81	15.55
INDUSTRIES QAT	13.57	0.52	-0.44	0.00	12.80	24.01	82.07 QAR	2.47	25.37
QA ISLAMIC BK	17.30	0.00	0.23	-0.40	5.29	1.29	40.87 QAR	1.85	13.99
MASRAF AL RAYA	4.46	0.00	0.79	0.27	4.43	-1.10	33.44 QAR	2.45	15.18
MESAIEED PETRO	1.93	-0.41	0.74	-0.78	2.96	-6.45	24.19 QAR	1.55	28.32
OMAN									
BANK MUSCAT	0.392	0.00	0.51	1.03	2.60	9.44	1.40 OMR	0.70	8.33
OMANTEL	0.792	0.00	6.12	7.77	5.58	14.92	0.60 OMR	1.03	7.69
BANK DHOFAR	0.108	0.00	-0.92	-0.92	1.89	11.34	0.32 QAR	0.46	14.93
NAT BANK OF OMAN	0.160	1.27	0.00	1.27	6.67	0.00	0.26 QAR	0.48	12.71
OMINVEST	0.310	0.00	-1.90	0.00	-3.12	-8.28	0.25 QAR	0.94	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
28-Apr-21	19.80%	11.85%	0.06%	1.07%	0.33%	4.55%	2.66%	10.25%	5.04%	4.19%
5-May-21	19.83%	11.62%	0.06%	1.07%	0.32%	4.49%	2.67%	10.21%	5.01%	4.17%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is down today by -0.13 % The leading sector bottom performance indices today are Insurance -0.96 % Consumer Disc -0.75 % Real estate -0.54 % respectively

from YTD performance prespective the best sector performance is Industrials by 30.47 % while the bottom sector performance is Utilities by -8.66 %

Telecommunication sector are up today by + 0.26 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -12.65 %

KSA

Saudi Armco has a positive performance today by + 0.28 %, SABIC has a positive performance today by + 2.50 %

STC has a positive performance today by + 0.33 %, Al Rajhi Bank has a positive performance today by + 0.50 %

UAE

ETISALAT AD closed flat today and act defensively with COVID19



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