

شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, November 11, 2021



DAILY MARKETS WRAP,

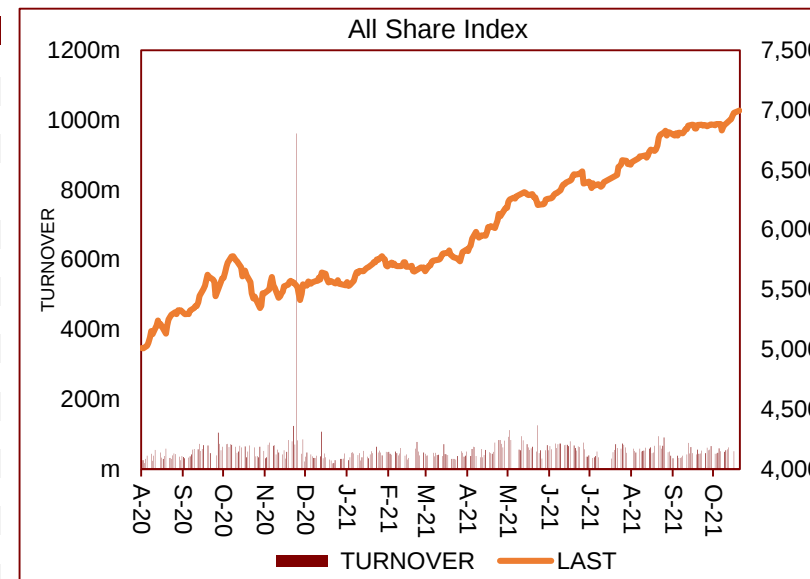
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Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,318.00	0.35	1.56	2.91	6.55	31.88	43.14 KWD	2.19	27.14
Kuwait Premier Index	7,926.43	0.50	2.12	2.95	5.65	30.89	32.17 KWD	2.36	28.96
Kuwait Main Index	6,141.01	-0.08	-0.07	2.77	9.34	34.95	10.98 KWD	1.68	21.93
NIC 50	8,852.99	0.44	2.07	2.88	5.58	30.89	28.60 KWD	2.34	27.96
Kuwait Sector									
Banking	1,672.57	0.53	2.46	3.25	6.11	32.49	24.62 KWD	1.24	29.96
Telecom	1,109.68	0.81	0.87	0.59	1.28	0.67	3.38 KWD	0.95	13.79
Industrials	1,227.96	0.37	0.27	2.06	5.22	37.80	4.34 KWD	1.05	12.93
Financial services	1,473.55	-0.41	-0.57	2.45	11.72	58.50	3.79 KWD	0.96	14.86
Real estate	1,425.84	-0.02	1.19	4.14	11.44	49.67	3.07 KWD	0.81	28.75
Basic materials	1,101.66	-0.27	-1.31	0.19	1.19	22.60	0.99 KWD	1.85	29.66
Health care	794.82	-0.72	0.00	0.00	-0.13	-3.85	0.40 KWD	4.55	12.29
Consumer services	767.81	-0.54	-0.27	-1.05	-2.00	2.87	0.71 KWD	1.12	11.33
Insurance	1,586.60	-0.32	3.36	7.39	9.42	37.23	0.66 KWD	0.89	9.94
Consumer Disc	1,385.52	0.43	1.72	9.62	24.02	69.25	0.24 KWD	1.38	9.52
Energy	1,559.27	0.02	5.42	6.88	13.25	22.07	0.32 KWD	1.14	14.97
Technology	785.70	0.00	3.85	1.89	9.98	56.30	0.01 KWD	0.92	0.00
Utilities	642.11	0.00	0.83	3.39	2.96	-11.91	0.27 KWD	4.31	20.65

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,898.94	0.35	1.15	1.57	3.41	36.93	10,450 SAR	2.54	18.80
Qatar (QE Index)	12,040.68	0.24	0.84	2.35	4.84	15.38	607 QAR	1.75	16.57
Dubai (DFMGI)	3,140.98	1.09	1.07	9.66	10.38	26.04	336 AED	1.63	26.74
Abu Dhabi (ADI)	8,285.62	0.67	3.38	5.35	7.62	64.22	1,409 AED	1.86	23.08
Bahrain (BAX)	1,789.40	0.09	0.59	2.66	4.92	20.11	18 BHD	1.16	10.99
MUSCAT SE INDEX	4,011.60	-0.63	-0.94	-1.56	1.75	9.64	5 OMR	0.89	13.25
Developed Markets									
MSCI World Index	3,201.99	0.01	-0.95	0.85	6.48	19.02			
U.S. (S&P 500)	4,649.27	0.06	-1.08	0.90	7.87	23.71			
U.K. (FTSE 100)	7,384.18	0.60	0.83	1.76	3.93	14.00			
Japan (Topix)	2,014.30	0.32	-1.33	0.66	-0.78	11.62			
Emerging Markets									
MSCI EM Index	1,281.40	0.55	0.82	0.76	1.70	-1.31			
China (SSE Composite)	3,532.79	1.15	1.18	-0.41	-0.99	1.72			
India (Sensex)	59,919.69	-0.72	-0.21	1.07	1.38	25.53			



What Move the GCC markets ,

Oil Prices

Oil prices were steady on Thursday after falling in the previous session on concerns rising inflation in the United States, spurred by climbing energy costs, may prompt the government to release more strategic crude stockpiles to drive down prices, Brent crude futures gained 18 cents, or 0.2%, to \$82.82 a barrel.

Kuwait Market

The market closed today up by + 0.35%, value traded 77.7 million KD, Premier market value traded reached 46.4 million KD and closed at 7,926.43 up by + 0.50%.

Saudi Market

The Market closed up today by + 0.35%, with positive macroeconomic sentiments bounce of oil reaching \$82.82 or + 0.2%.

DAILY MARKETS WRAP,

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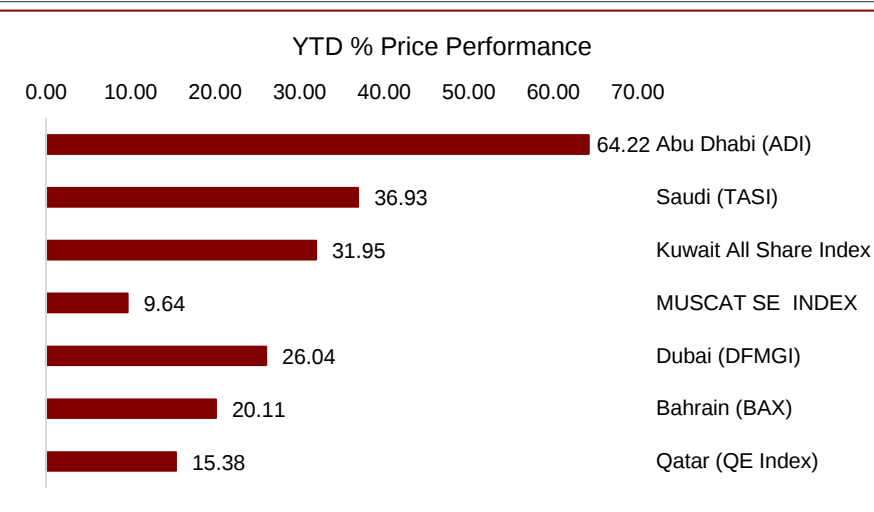
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.050	0.96	5.22	5.86	9.97	31.00	7.48 KWD	1.93	27.00
KFH	0.847	0.00	0.47	1.32	3.04	37.62	7.15 KWD	3.29	32.00
Zain	0.603	1.01	1.17	0.67	0.67	-0.49	2.58 KWD	2.23	13.79
BOUBAYAN BANK	0.823	1.35	4.31	4.84	7.16	52.14	2.58 KWD	3.68	34.00
Agility	1.021	0.69	1.09	3.34	3.65	66.14	2.26 KWD	1.82	28.30
Saudi Arabia									
ARAMCO	37.55	0.40	-1.06	-1.19	4.03	7.00	7,480.40 SAR	7.00	22.57
SABIC	128.40	0.16	1.42	1.74	1.26	27.22	384.62 SAR	2.21	35.00
STC	115.20	0.17	-0.52	0.17	-9.13	8.87	230.01 SAR	3.35	20.36
AL-RAJHI BANK	149.00	0.00	4.79	7.05	21.37	102.17	372.52 SAR	5.85	26.52
NCB	70.00	1.45	6.07	7.21	13.84	61.25	309.00 SAR	1.92	19.43
United Arab Emirates									
ETISALAT.AD	27.80	1.46	4.04	8.59	15.74	64.50	238.29 AED	5.17	25.82
FAB.AD	19.12	1.16	4.14	7.42	7.54	48.22	206.39 AED	1.89	16.98
EMIRATES NBD	14.25	2.52	1.42	3.64	0.35	38.35	87.80 AED	1.03	11.00
DB ISLAMIC BK	5.39	0.37	1.13	5.48	8.89	16.92	38.88 AED	1.02	14.32
EMAAR PROPERT	4.83	0.42	1.26	19.55	18.38	36.83	34.44 AED	0.61	15.86
Qatar									
QNB	21.05	0.24	0.53	2.75	9.45	17.55	193.96 QAR	1.94	16.47
INDUSTRIES QAT	15.95	0.06	-0.06	-1.54	3.24	46.73	96.44 QAR	2.58	14.48
QA ISLAMIC BK	18.30	0.38	0.83	0.55	0.27	6.96	43.08 QAR	1.80	13.59
MASRAF AL RAYA	4.96	0.24	-0.52	5.51	10.72	9.47	37.10 QAR	2.50	16.66
MESAIEED PETRO	2.35	-0.21	-0.43	6.32	3.63	14.26	29.59 QAR	1.77	18.05
OMAN									
BANK MUSCAT	0.486	-0.82	1.25	0.00	8.00	35.00	1.75 OMR	0.83	8.33
OMANTEL	0.740	0.54	-1.60	-3.66	-0.54	1.66	0.55 OMR	1.00	7.69
BANK DHOFAR	0.130	1.56	-3.03	-1.54	9.40	31.96	0.38 QAR	0.54	14.93
NAT BANK OF OMAN	0.194	3.74	-1.03	-1.03	3.78	20.00	0.30 QAR	0.55	12.71
OMINVEST	0.316	0.64	2.60	1.94	0.64	-6.51	0.25 QAR	0.93	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
3-Nov-21	20.81%	10.81%	0.06%	0.35%	0.40%	4.78%	2.69%	10.87%	5.27%	4.33%
10-Nov-21	20.82%	10.79%	0.06%	0.32%	0.40%	4.62%	2.73%	10.78%	5.28%	4.33%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is up today by + 0.35 %The leading sector best performance indices today are Banking 0.53 % Consumer Disc 0.43 % Industrials 0.37 % respectively

Telecommunication sector are up today by + 0.81 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-31.21 %

KSA

Saudi Armco has a positive performance today by + 0.40 %, SABIC have positive performance today by + 0.16 %

STC has a positive performance today by + 0.17 %, Al Rajhi Bank has a flat performance today

UAE

ETISALAT AD closed up today by + 1.46%, and act defensively with COVID19



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