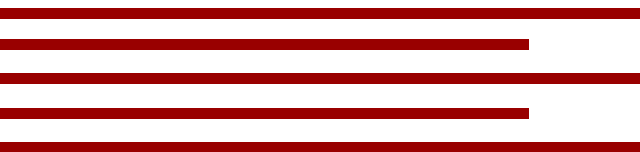


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

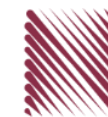


GCC DAILY MORNING BRIEF

Wednesday, August 11, 2021

DAILY MARKETS WRAP,

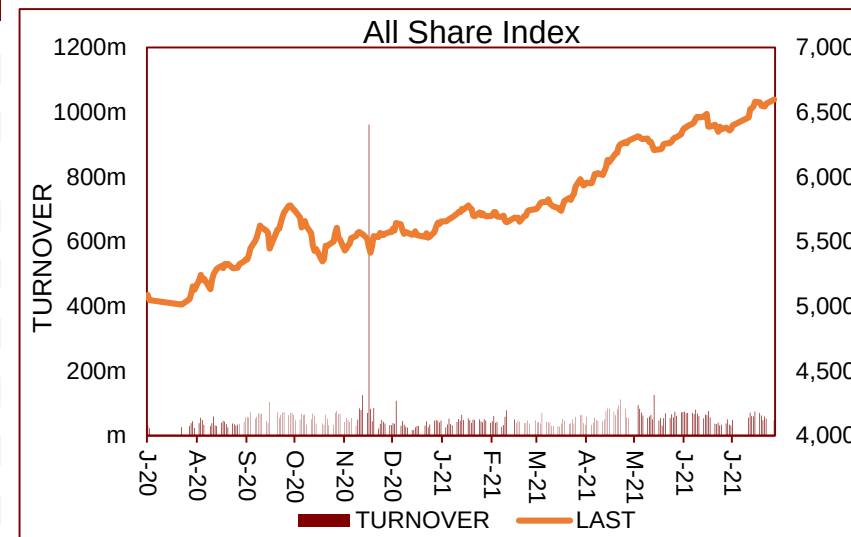
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Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,611.84	0.23	0.51	0.27	3.32	18.99	38.85 KWD	2.11	32.14
Kuwait Premier Index	7,198.17	0.12	0.42	0.26	3.57	18.71	29.20 KWD	2.24	33.25
Kuwait Main Index	5,462.88	0.59	0.77	0.31	2.58	19.81	9.65 KWD	1.70	28.99
NIC 50	8,014.09	0.01	0.37	0.18	3.50	18.71	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,504.55	0.17	0.70	0.26	3.91	19.18	22.19 KWD	1.38	34.25
Telecom	1,082.43	-0.28	0.15	-0.69	0.18	-1.80	3.32 KWD	0.71	13.68
Industrials	1,160.23	0.65	0.71	-0.08	2.35	30.03	4.12 KWD	0.83	14.53
Financial services	1,255.19	0.51	0.99	3.15	8.53	35.01	3.12 KWD	0.81	9.57
Real estate	1,230.17	0.59	1.48	1.73	3.82	29.13	2.65 KWD	0.70	38.11
Basic materials	1,061.49	-0.17	-0.54	-1.45	-3.10	18.13	0.95 KWD	1.90	11.39
Health care	814.99	0.00	-0.15	1.78	3.14	-1.41	0.40 KWD	3.72	39.71
Consumer services	756.42	-0.67	-0.98	-1.95	-3.54	1.35	0.53 KWD	0.86	7.47
Insurance	1,428.21	1.51	2.48	1.67	3.08	23.53	0.55 KWD	0.95	9.41
Consumer Disc	1,027.56	-0.03	0.23	-0.75	5.45	25.53	0.23 KWD	1.30	8.52
Energy	1,407.74	-0.16	-0.48	-0.59	-1.58	10.21	0.29 KWD	1.03	14.02
Technology	742.05	-0.97	0.00	-1.92	-9.74	47.61	0.01 KWD	0.87	0.00
Utilities	597.37	0.00	0.44	0.00	-0.44	-18.05	0.25 KWD	3.57	20.38

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,325.10	0.22	1.03	2.84	3.10	30.33	9,824 SAR	2.76	21.32
Qatar (QE Index)	10,916.13	0.03	0.10	1.54	1.75	4.63	557 QAR	1.55	15.82
Dubai (DFMGI)	2,814.63	-0.07	-0.20	1.77	0.14	12.95	308 AED	1.47	12.36
Abu Dhabi (ADI)	7,594.35	0.47	2.36	3.77	11.10	50.52	1,349 AED	1.71	22.84
Bahrain (BAX)	1,622.91	0.31	0.50	1.62	2.20	8.94	16 BHD	1.18	23.32
MUSCAT SE INDEX	4,005.92	0.15	0.10	-0.61	-1.41	9.49	5 OMR	0.92	13.25
Developed Markets									
MSCI World Index	3,099.49	0.08	0.05	0.99	2.73	15.22			
U.S. (S&P 500)	4,436.75	0.33	0.01	0.94	3.24	18.12			
U.K. (FTSE 100)	7,198.81	0.53	1.07	2.37	2.29	11.43			
Japan (Topix)	1,954.08	0.92	1.28	2.79	0.54	8.28			
Emerging Markets									
MSCI EM Index	1,300.33	0.47	0.60	1.76	-5.41	0.70			
China (SSE Composite)	3,532.62	0.08	2.15	3.98	-1.63	1.71			
India (Sensex)	54,525.93	-0.05	0.41	3.64	3.85	14.14			



What Move the GCC markets ,

Oil Prices

Oil prices fell on Wednesday after the White House called on OPEC and its allies to increase oil production to support the global recovery from the pandemic. Brent crude also slipped by roughly 2% to about \$69.25 per barrel. Both contracts have traded above \$70 per barrel in recent weeks.

Kuwait Market

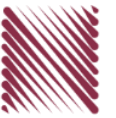
The market closed up by 0.23%, value traded 58.5 million KD, Premier market value traded reached 25.8 million KD and closed at 7,198 change by 0.21%.

Saudi Market

The Market closed up today by +0.22%, with positive macroeconomic sentiments bounce of oil +1% recouping some of the losses in the previous session when prices hit a three-week low.

DAILY MARKETS WRAP,

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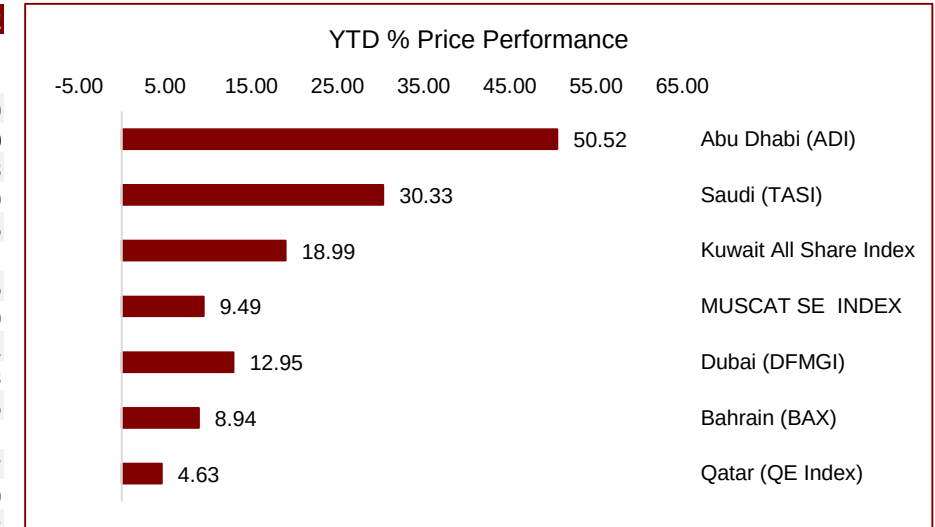


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE	
Blue Chip Watch		%	%	%	%	%				
Kuwait										
NBK	0.890	-0.22	-0.22	-0.56	4.71	11.13	6.40 KWD	1.69	27.00	
KFH	0.788	0.00	0.13	0.13	3.56	27.71	6.65 KWD	3.15	32.00	
Zain	0.590	-0.34	0.00	-0.34	0.00	-2.81	2.55 KWD	2.21	13.68	
BOUBYAN BANK	0.784	0.90	2.24	-3.12	5.87	43.27	2.49 KWD	3.60	34.00	
Agility	0.996	1.63	2.36	1.01	8.50	62.07	2.22 KWD	1.82	48.65	
Saudi Arabia										
ARAMCO	35.25	0.28	0.57	1.15	0.43	0.71	7,029.81 SAR	6.82	26.45	
SABIC	122.80	-0.32	-1.92	1.49	0.82	21.10	369.59 SAR	2.16	35.00	
STC	136.20	-0.73	-1.16	1.64	3.50	28.49	274.39 SAR	4.29	24.61	
AL-RAJHI BANK	119.40	0.34	1.88	7.57	7.57	62.23	297.49 SAR	4.99	23.23	
NCB	60.00	0.67	4.35	9.09	4.17	38.41	266.88 SAR	2.14	16.45	
United Arab Emirates										
ETISALAT.AD	24.10	0.42	0.42	5.70	9.55	42.60	209.59 AED	4.45	22.67	
FAB.AD	16.70	-0.83	0.36	0.72	0.00	29.46	182.36 AED	1.72	17.10	
EMIRATES NBD	13.40	-1.47	0.00	0.00	1.13	30.10	84.64 AED	1.01	12.32	
DB ISLAMIC BK	5.02	-0.20	-0.99	3.93	4.15	8.89	36.35 AED	0.98	15.24	
EMAAR PROPERT	4.04	0.75	-0.98	1.51	-2.88	14.45	28.93 AED	0.52	11.65	
Qatar										
QNB	18.80	1.62	2.24	2.91	4.35	5.05	173.64 QAR	1.80	15.01	
INDUSTRIES QAT	13.32	-0.60	-0.22	-0.07	0.68	22.72	80.59 QAR	2.28	16.12	
QA ISLAMIC BK	17.03	-1.50	-0.23	0.23	-0.17	0.88	40.24 QAR	1.75	13.49	
MASRAF AL RAYA	4.37	-1.35	-1.55	1.41	-1.75	-3.29	32.78 QAR	2.30	14.87	
MESAIEED PETRO	1.98	-0.65	-0.50	3.56	5.21	-3.27	24.93 QAR	1.54	19.20	
OMAN										
BANK MUSCAT	0.444	0.45	-0.45	-0.89	4.72	23.33	1.59 OMR	0.77	8.33	
OMANTEL	0.780	-1.02	-1.52	-1.52	-2.01	7.73	0.59 OMR	1.07	7.69	
BANK DHOFAR	0.121	0.00	2.54	-1.63	-3.20	24.74	0.36 QAR	0.52	14.93	
NAT BANK OF OMAN	0.183	0.55	2.81	-1.08	-8.50	14.38	0.30 QAR	0.55	12.71	
OMINVEST	0.320	0.00	0.63	1.91	2.56	-5.33	0.26 QAR	1.00	6.85	
Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
21-Jul-21	20.02%	12.78%	0.06%	0.41%	0.37%	4.66%	2.55%	10.55%	5.05%	4.08%
28-Jul-21	20.03%	12.92%	0.06%	0.41%	0.37%	4.66%	2.55%	10.58%	5.04%	4.09%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is up today by + 0.23 %The leading sector best performance indices today are Industrials 0.65 % Real estate 0.59 % Financial services 0.51 % respectively

Telecommunication sector are down today by -0.28 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-20.79 %

from sectoral analysis performance perspective the Banking sector performance year to date are 19.18 %

KSA

Saudi Armco has a positive performance today by + 0.28 %, SABIC have negative performance today by -0.32 %

STC have negative performance today by -0.73 %, Al Rajhi Bank has a positive performance today by + 0.34 %

UAE

ETISALAT AD closed up today by +0.42%, and act defensively with COVID19



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