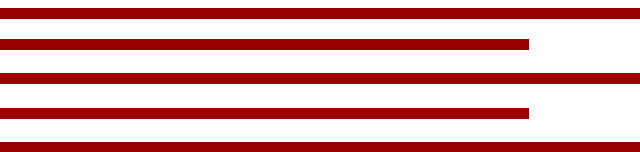
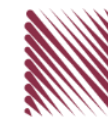


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



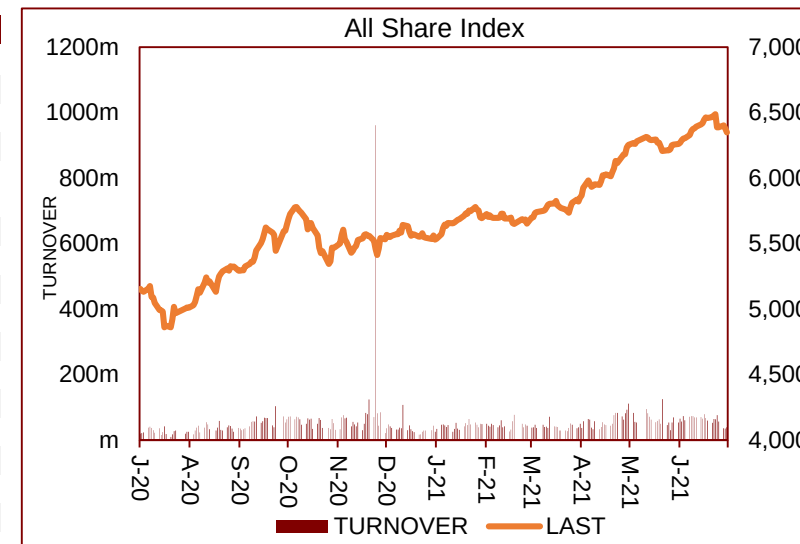
GCC DAILY MORNING BRIEF

Monday, July 12, 2021



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,370.28	-0.15	0.10	-0.21	-0.21	14.92	37.55 KWD	2.12	34.09
Kuwait Premier Index	6,911.00	-0.23	-0.08	-0.31	-0.31	14.27	28.18 KWD	2.28	35.97
Kuwait Main Index	5,320.00	0.12	0.65	0.11	0.11	16.92	9.37 KWD	1.65	28.61
NIC 50	7,700.78	-0.13	-0.13	-0.39	-0.38	14.27	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,442.52	-0.13	0.03	-0.38	-0.38	14.26	21.37 KWD	1.40	36.97
Telecom	1,068.74	-0.32	-0.08	-1.08	-1.08	-3.05	3.29 KWD	0.61	13.88
Industrials	1,124.62	-1.16	-1.36	-0.66	-0.66	26.21	4.03 KWD	0.80	13.88
Financial services	1,182.14	0.49	1.48	2.21	2.21	27.15	2.98 KWD	0.80	11.33
Real estate	1,178.17	-0.12	0.32	-0.57	-0.57	23.68	2.54 KWD	0.67	43.94
Basic materials	1,083.98	0.28	-0.63	-1.05	-1.05	20.63	0.96 KWD	1.91	11.39
Health care	801.46	-0.23	-0.23	1.43	1.43	-3.05	0.40 KWD	3.89	39.71
Consumer services	774.22	0.04	-0.62	-1.27	-1.27	3.73	0.51 KWD	0.90	9.66
Insurance	1,351.24	0.61	0.81	-2.48	-2.48	16.87	0.51 KWD	0.82	9.27
Consumer Disc	1,002.49	1.81	2.24	2.88	2.88	22.46	0.24 KWD	1.33	8.66
Energy	1,429.24	0.26	0.90	-0.08	-0.08	11.89	0.30 KWD	1.05	14.23
Technology	807.53	2.78	-1.77	-1.77	-1.77	60.64	0.01 KWD	0.91	0.00
Utilities	586.84	0.00	0.45	-2.19	-2.19	-19.50	0.25 KWD	3.50	19.93



What Move the GCC markets ,

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,698.54	0.10	-1.48	-2.91	-2.91	22.73	9,552 SAR	2.75	22.07
Qatar (QE Index)	10,776.34	-0.17	-0.36	0.69	0.69	3.53	541 QAR	1.54	20.14
Dubai (DFMGI)	2,758.00	-0.10	-0.78	-1.87	-1.87	10.68	304 AED	1.36	11.52
Abu Dhabi (ADI)	7,022.68	0.42	0.85	2.74	2.74	39.19	991 AED	1.96	11.69
Bahrain (BAX)	1,572.09	-0.50	0.00	-0.82	-0.82	5.72	16 BHD	1.23	23.36
MUSCAT SE INDEX	4,108.13	-0.59	-0.30	1.10	1.10	12.28	5 OMR	0.92	13.25
Developed Markets									
MSCI World Index	3,053.12	1.02	0.00	1.19	1.19	13.50			
U.S. (S&P 500)	4,369.55	0.33	0.40	1.68	1.68	16.33			
U.K. (FTSE 100)	7,082.39	-0.55	-0.55	0.64	0.64	9.63			
Japan (Topix)	1,953.33	2.14	2.14	0.50	0.50	8.24			
Emerging Markets									
MSCI EM Index	1,318.18	0.15	0.00	-4.11	-4.11	2.08			
China (SSE Composite)	3,547.84	0.67	0.67	-1.21	-1.21	2.15			
India (Sensex)	52,372.69	-0.03	-0.04	-0.22	-0.22	9.66			

Oil Prices

Crude futures slipped on Monday as concerns over slowing global growth outweighed the prospect of tightening supply after talks among key producers to raise output in coming months stalled, Brent crude for September fell \$1.14, or 1.5%, to \$74.41 per barrel.

Kuwait Market

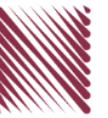
The market closed down by 0.15%, value traded 50.1 million KD, Premier market value traded reached 28.2 million KD and closed at 6,911 change by 0.23%.

Saudi Market

The Market closed up today by 0.10%, today market Performance is linked to oil prices raised to \$74.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



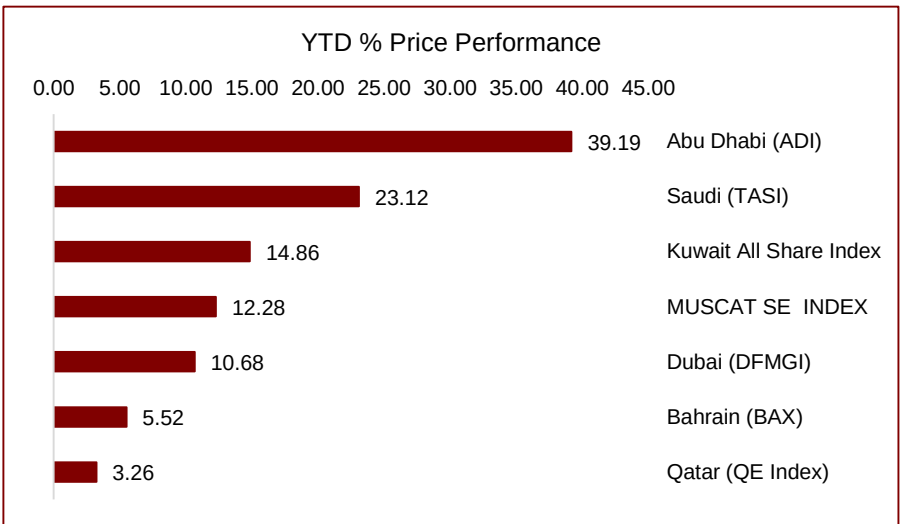
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.857	0.00	0.94	1.18	1.18	7.38	6.16 KWD	1.59	27.00
KFH	0.754	0.00	-0.13	-0.53	-0.53	22.67	6.36 KWD	3.38	32.00
Zain	0.582	-0.34	-0.17	-1.19	-1.19	-3.96	2.53 KWD	2.26	13.88
BOUBAYAN BANK	0.748	-0.27	0.40	2.60	2.60	38.83	2.38 KWD	3.91	34.00
Agility	0.937	-0.43	-0.11	2.07	2.07	52.47	2.10 KWD	1.72	46.71
Saudi Arabia									
ARAMCO	34.55	-0.14	-1.00	-1.71	-1.71	-1.43	6,920.00 SAR	6.84	34.82
SABIC	117.80	0.86	0.17	-3.78	-3.78	15.58	350.40 SAR	2.04	35.00
STC	127.80	0.79	-0.62	-2.74	-2.74	20.75	253.60 SAR	3.89	23.34
AL-RAJHI BANK	107.60	0.94	-1.29	-3.60	-3.60	45.38	266.50 SAR	4.50	23.46
NCB	55.00	-0.72	-2.13	-4.17	-4.17	27.34	248.08 SAR	1.99	14.62
United Arab Emirates									
ETISALAT.AD	22.30	1.18	0.27	1.36	1.36	31.95	191.68 AED	4.29	20.84
FAB.AD	16.34	0.37	-0.12	-2.16	-2.16	26.67	177.78 AED	1.73	17.29
EMIRATES NBD	13.10	0.00	-2.24	-1.13	-1.13	27.18	82.75 AED	1.00	12.64
DB ISLAMIC BK	4.75	-1.04	-1.25	-1.45	-1.45	3.04	34.76 AED	0.96	14.04
EMAAR PROPERT	4.03	0.75	0.00	-3.12	-3.12	14.16	28.64 AED	0.51	11.62
Qatar									
QNB	17.82	0.11	0.34	0.06	0.06	0.73	162.34 QAR	1.78	15.30
INDUSTRIES QAT	13.31	-0.89	-1.91	0.68	0.68	22.72	80.23 QAR	2.44	25.11
QA ISLAMIC BK	17.11	0.29	-0.58	-0.81	-0.81	0.23	39.80 QAR	1.82	13.79
MASRAF AL RAYA	4.44	-0.20	-0.27	-0.20	-0.20	-1.77	32.95 QAR	2.44	15.15
MESAIEED PETRO	1.88	-0.21	-0.16	0.27	0.27	-7.82	23.38 QAR	1.51	27.72
OMAN									
BANK MUSCAT	0.448	0.00	1.36	5.66	5.66	24.44	1.60 OMR	0.80	8.33
OMANTEL	0.780	-0.51	-1.02	-2.01	-2.01	7.73	0.59 OMR	1.10	7.69
BANK DHOFAR	0.125	-0.79	-3.85	0.00	0.00	28.87	0.38 QAR	0.54	14.93
NAT BANK OF OMAN	0.187	-6.03	-4.59	-6.50	-6.50	16.88	0.32 QAR	0.60	12.71
OMINVEST	0.320	-0.62	0.00	2.56	2.56	-5.33	0.26 QAR	1.00	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
30-Jun-21	19.97%	12.58%	0.06%	0.42%	0.34%	4.84%	2.57%	10.53%	5.08%	4.07%
7-Jul-21	19.98%	12.68%	0.06%	0.43%	0.35%	4.66%	2.56%	10.52%	5.05%	4.05%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is down today by -0.15 % The leading sector bottom performance indices today are Industrials -1.16 % Telecom -0.32 % Health care -0.23 % respectively

from YTD performance perspective the best sector performance is Financial services by 27.15 % while the bottom sector performance is Utilities by -19.5 %

Telecommunication sector is down today by -0.32 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -17.97 %

KSA

Saudi Armco have negative performance today by -0.14 %, SABIC have positive performance today by + 0.86 %

STC has a positive performance today by + 0.79 %, Al Rajhi Bank has a positive performance today by + 0.94 %

UAE

ETISALAT AD closed up today by 1.18 % , and act defensively with COVID19



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