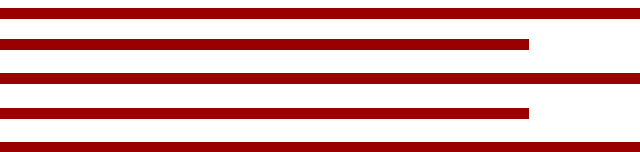


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



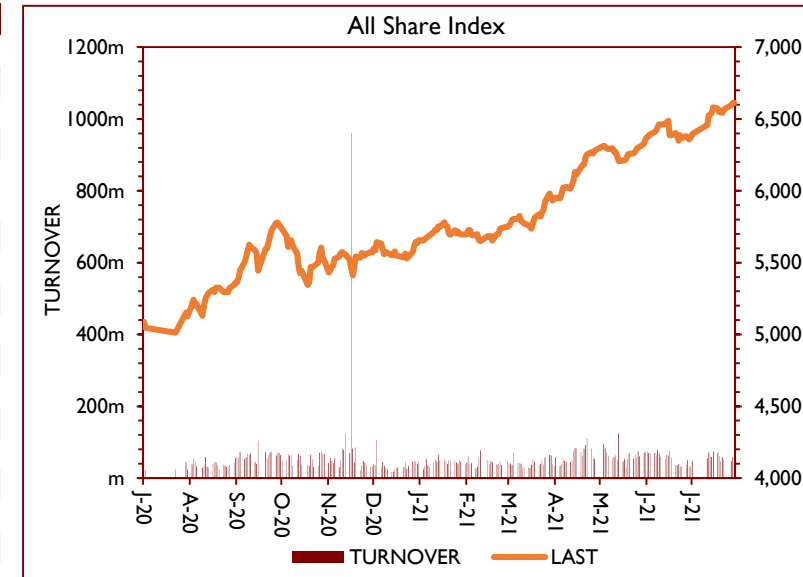
GCC DAILY MORNING BRIEF

Thursday, August 12, 2021



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	6,612.65	0.01	0.71	0.48	3.54	19.23	38.79 KWD	2.11	31.79
Kuwait Premier Index	7,208.23	0.14	0.77	0.61	3.92	19.12	29.15 KWD	2.24	32.90
Kuwait Main Index	5,442.06	-0.38	0.62	0.16	2.43	19.63	9.64 KWD	1.70	28.65
NIC 50	8,031.73	0.22	0.72	0.53	3.85	19.12	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,507.11	0.17	0.83	0.39	4.04	19.33	22.15 KWD	1.38	33.90
Telecom	1,083.87	0.13	0.01	-0.82	0.05	-1.93	3.31 KWD	0.71	13.63
Industrials	1,163.69	0.30	1.17	0.38	2.82	30.63	4.11 KWD	0.83	14.44
Financial services	1,248.30	-0.55	0.72	2.87	8.23	34.64	3.12 KWD	0.81	7.72
Real estate	1,226.70	-0.28	1.11	1.37	3.45	28.67	2.64 KWD	0.70	36.58
Basic materials	1,054.94	-0.62	-0.93	-1.83	-3.48	17.67	0.94 KWD	1.90	11.43
Health care	807.12	-0.97	-1.11	0.79	2.15	-2.36	0.40 KWD	3.72	39.71
Consumer services	748.21	-1.09	-2.15	-3.11	-4.68	0.15	0.53 KWD	0.86	7.40
Insurance	1,412.05	-1.13	1.22	0.42	1.82	22.02	0.55 KWD	0.95	9.41
Consumer Disc	1,026.03	-0.15	0.09	-0.89	5.30	25.35	0.23 KWD	1.30	8.45
Energy	1,394.49	-0.94	-1.73	-1.84	-2.82	8.83	0.29 KWD	1.03	14.08
Technology	728.23	-1.86	-1.86	-3.75	-11.42	44.86	0.01 KWD	0.87	0.00
Utilities	594.74	0.00	0.00	-0.44	-0.88	-18.41	0.25 KWD	3.57	20.29
GCC Markets									
Saudi (TASI)	11,323.70	-0.01	1.02	2.82	3.09	30.31	9,850 SAR	2.85	20.94
Qatar (QE Index)	10,920.42	0.04	0.10	1.54	1.75	4.63	557 QAR	1.55	15.86
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	1.70	22.84
Bahrain (BAX)	1,631.08	0.50	1.00	2.13	2.71	9.48	16 BHD	1.18	15.77
MUSCAT SE INDEX	4,002.19	-0.09	0.00	-0.70	-1.51	9.39	5 OMR	0.92	13.25
Developed Markets									
MSCI World Index	3,109.97	0.34	0.38	1.33	3.07	15.61			
U.S. (S&P 500)	4,447.70	0.33	0.25	1.19	3.50	18.41			
U.K. (FTSE 100)	7,203.92	-0.22	1.14	2.44	2.37	11.51			
Japan (Topix)	1,953.55	-0.03	1.25	2.76	0.51	8.25			
Emerging Markets									
MSCI EM Index	1,297.58	-0.21	0.39	1.55	-5.61	0.49			
China (SSE Composite)	3,524.74	-0.22	1.92	3.75	-1.85	1.49			
India (Sensex)	54,843.98	0.58	1.00	4.25	4.46	14.81			



What Move the GCC markets ,

Oil Prices

Oil prices were steady on Thursday following two days of gains after a call from the United States, the world's top oil consumer, for major producers to boost output reinforced supply concerns as economies ease their coronavirus restrictions. Brent crude futures slid 10 cents to \$71.34 per barrel while U.S. West Texas Intermediate (WTI) crude futures declined 17 cents to \$69.08 per barrel.

Kuwait Market

The market closed up by 0.01%, value traded 49.9 million KD, Premier market value traded reached 24.4 million KD and closed at 7,208 change by 0.18%.

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,

NIC RESEARCH AND STUDIES DEP



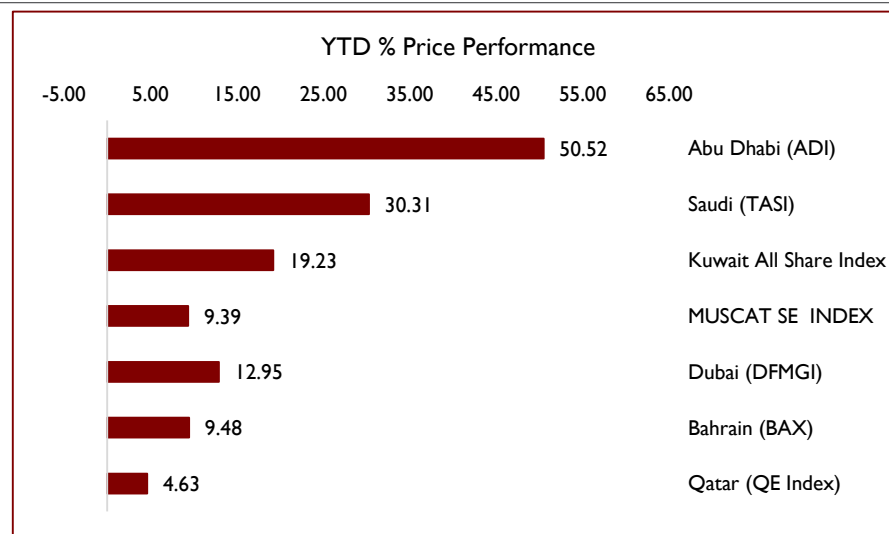
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.891	0.11	0.00	-0.34	4.95	11.38	6.39 KWD	1.69	27.00
KFH	0.787	-0.13	0.38	0.38	3.82	28.04	6.64 KWD	3.15	32.00
Zain	0.591	0.17	0.00	-0.34	0.00	-2.81	2.55 KWD	2.21	13.63
BOUBAYAN BANK	0.789	0.64	3.43	-2.00	7.10	44.93	2.49 KWD	3.60	34.00
Agility	1.006	1.00	2.36	1.01	8.50	62.07	2.22 KWD	1.82	49.44
Saudi Arabia									
ARAMCO	35.20	-0.14	0.43	1.00	0.28	0.57	7,050.19 SAR	6.84	26.45
SABIC	122.80	0.00	-1.92	1.49	0.82	21.10	368.41 SAR	2.15	35.00
STC	136.20	0.00	-1.16	1.64	3.50	28.49	272.41 SAR	4.26	24.65
AL-RAJHI BANK	121.00	1.34	3.24	9.01	9.01	64.40	298.51 SAR	5.00	23.39
NCB	60.00	0.00	4.35	9.09	4.17	38.41	268.69 SAR	2.16	17.02
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	19.04	1.28	3.71	4.40	5.85	6.56	173.64 QAR	1.80	15.25
INDUSTRIES QAT	13.33	0.08	-0.22	-0.07	0.68	22.72	80.59 QAR	2.28	16.03
QA ISLAMIC BK	17.28	1.47	-0.12	0.35	-0.06	0.99	40.24 QAR	1.75	13.29
MASRAF AL RAYA	4.39	0.55	-1.26	1.71	-1.46	-3.00	32.78 QAR	2.30	14.66
MESAIEED PETRO	1.97	-0.76	-1.06	2.98	4.62	-3.81	24.93 QAR	1.54	19.08
OMAN									
BANK MUSCAT	0.442	-0.45	-0.45	-0.89	4.72	23.33	1.59 OMR	0.77	8.33
OMANTEL	0.776	-1.52	-2.02	-2.02	-2.51	7.18	0.59 OMR	1.07	7.69
BANK DHOFAR	0.120	-0.83	1.69	-2.44	-4.00	23.71	0.36 QAR	0.52	14.93
NAT BANK OF OMAN	0.189	3.28	6.18	2.16	-5.50	18.13	0.30 QAR	0.55	12.71
OMINVEST	0.316	-1.25	-0.63	0.64	1.28	-6.51	0.26 QAR	1.00	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
4-Aug-21	20.15%	12.15%	0.06%	0.39%	0.37%	4.67%	2.55%	10.64%	5.08%	4.14%
11-Aug-21	20.22%	11.87%	0.06%	0.38%	0.37%	4.68%	2.55%	10.69%	5.09%	4.14%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is up today by + 0.01 %The leading sector best performance indices today are Banking 0.17 % Telecom 0.13 % Utilities 0 % respectively.

Telecommunication sector are up today by + 0.13 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-21.16 %.

from sectoral analysis performance perspective the Banking sector performance year to date are 19.33 %

KSA

Saudi Armco have negative performance today by -0.14 %, SABIC flat performance today 0 %

STC flat performance today 0 %, Al Rajhi Bank has a positive performance today by + 1.34

UAE

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



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