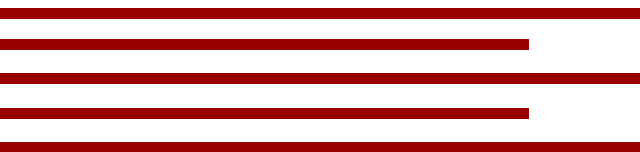
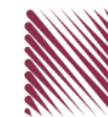


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MORNING BRIEF

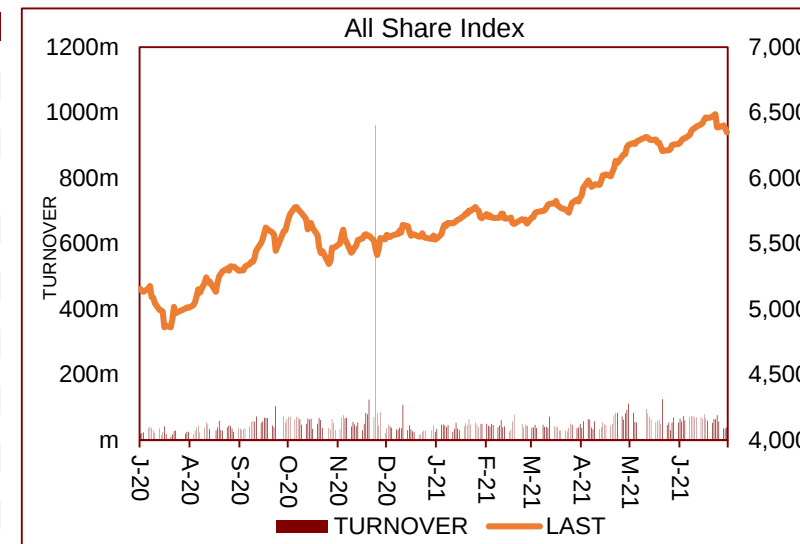
Tuesday, July 13, 2021



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,357.85	-0.20	-0.15	-0.45	-0.45	14.64	37.54 KWD	2.12	33.99
Kuwait Premier Index	6,893.64	-0.25	-0.30	-0.53	-0.53	14.02	28.15 KWD	2.27	35.86
Kuwait Main Index	5,318.69	-0.02	0.60	0.06	0.06	16.86	9.39 KWD	1.67	28.56
NIC 50	7,681.02	-0.26	-0.35	-0.61	-0.60	14.02	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,435.91	-0.46	-0.43	-0.83	-0.83	13.74	21.37 KWD	1.38	36.86
Telecom	1,073.59	0.45	0.37	-0.63	-0.63	-2.61	3.28 KWD	0.62	13.83
Industrials	1,122.16	-0.22	-1.58	-0.88	-0.88	25.93	3.99 KWD	0.81	14.01
Financial services	1,188.98	0.58	2.07	2.80	2.80	27.89	2.98 KWD	0.80	11.29
Real estate	1,173.93	-0.36	-0.04	-0.93	-0.93	23.23	2.54 KWD	0.67	43.93
Basic materials	1,085.11	0.10	-0.53	-0.95	-0.95	20.76	0.97 KWD	1.92	11.46
Health care	807.81	0.79	0.56	2.23	2.23	-2.28	0.40 KWD	3.89	39.71
Consumer services	767.04	-0.93	-1.54	-2.19	-2.19	2.77	0.52 KWD	0.88	9.57
Insurance	1,386.74	2.63	3.46	0.09	0.09	19.94	0.52 KWD	0.82	9.27
Consumer Disc	994.77	-0.77	1.46	2.08	2.08	21.52	0.24 KWD	1.33	8.67
Energy	1,418.89	-0.72	0.17	-0.80	-0.80	11.08	0.30 KWD	1.05	14.25
Technology	749.33	-7.21	-8.85	-8.85	-8.85	49.06	0.01 KWD	0.94	0.00
Utilities	586.84	0.00	0.45	-2.19	-2.19	-19.50	0.25 KWD	3.50	19.93

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,735.85	0.35	-1.02	-2.46	-2.46	23.30	9,546 SAR	2.76	21.74
Qatar (QE Index)	10,768.08	-0.08	-0.83	0.20	0.20	3.03	547 QAR	1.54	20.25
Dubai (DFMGI)	2,760.89	0.10	-0.68	-1.77	-1.77	10.79	304 AED	1.35	11.49
Abu Dhabi (ADI)	7,046.47	0.34	1.20	3.09	3.09	39.66	992 AED	1.96	11.61
Bahrain (BAX)	1,571.68	-0.03	-0.19	-1.00	-1.00	5.52	16 BHD	1.23	23.38
MUSCAT SE INDEX	4,087.24	-0.51	-0.80	0.59	0.59	11.71	5 OMR	0.91	13.25
Developed Markets									
MSCI World Index	3,059.28	-0.29	0.50	1.69	1.69	14.06			
U.S. (S&P 500)	4,369.21	-0.35	0.35	2.03	2.03	16.73			
U.K. (FTSE 100)	7,124.72	-0.01	0.16	1.36	1.36	10.41			
Japan (Topix)	1,967.64	0.73	2.89	1.24	1.24	9.03			
Emerging Markets									
MSCI EM Index	1,339.51	0.96	0.66	-3.48	-3.48	2.75			
China (SSE Composite)	3,566.52	0.53	1.20	-0.69	-0.69	2.69			
India (Sensex)	52,769.73	0.76	0.74	0.55	0.55	10.51			



What Move the GCC markets ,

Oil Prices

Oil rose on Tuesday, recovering from the previous day's drop, as expectations of further declines in U.S. crude inventories outweighed fears that spreading Covid-19 variants could derail a global economic recovery, Brent crude for September climbed 19 cents, or 0.3%, to \$75.35 per barrel.

Kuwait Market

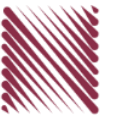
The market closed down by 0.20%, value traded 33.6 million KD, Premier market value traded reached 17.2 million KD and closed at 6,893 change by 0.25%.

Saudi Market

The Market closed up today by 0.35%, today market Performance is linked to oil prices raised to \$75.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



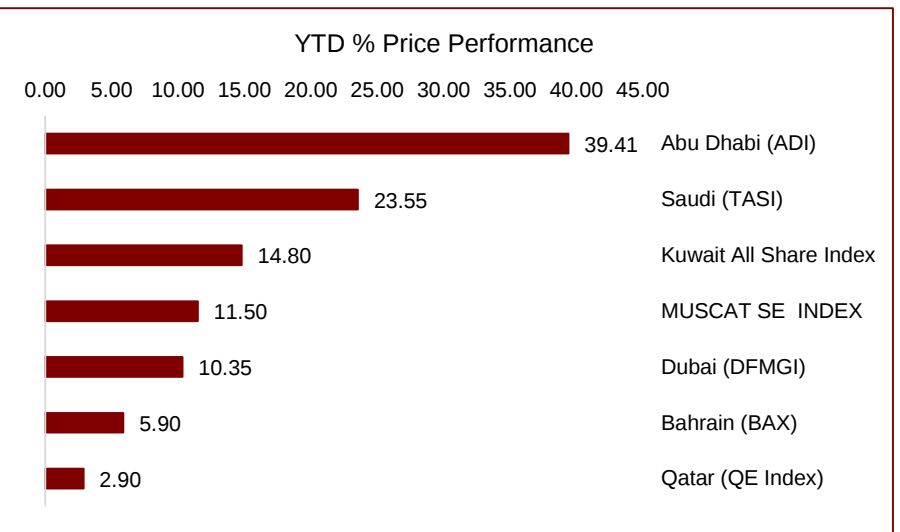
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.857	0.00	0.59	0.82	0.82	7.00	6.17 KWD	1.59	27.00
KFH	0.752	-0.27	-0.26	-0.66	-0.66	22.51	6.37 KWD	3.38	32.00
Zain	0.585	0.52	0.17	-0.85	-0.85	-3.63	2.52 KWD	2.25	13.83
BOUBYAN BANK	0.733	-2.01	-1.07	1.09	1.09	36.80	2.38 KWD	3.90	34.00
Agility	0.938	0.11	-0.11	2.07	2.07	52.47	2.09 KWD	1.71	46.51
Saudi Arabia									
ARAMCO	34.75	0.58	-0.43	-1.14	-1.14	-0.86	6,910.00 SAR	6.83	34.57
SABIC	117.00	-0.68	0.68	-3.28	-3.28	16.17	353.40 SAR	2.06	35.00
STC	129.00	0.94	-0.93	-3.04	-3.04	20.38	255.60 SAR	3.92	22.98
AL-RAJHI BANK	107.60	0.00	-0.55	-2.88	-2.88	46.47	269.00 SAR	4.54	23.07
NCB	55.20	0.36	-2.48	-4.51	-4.51	26.87	246.29 SAR	1.98	14.36
United Arab Emirates									
ETISALAT.AD	22.58	1.26	1.53	2.64	2.64	33.61	193.94 AED	4.34	21.09
FAB.AD	16.38	0.24	0.12	-1.92	-1.92	26.98	178.43 AED	1.74	17.36
EMIRATES NBD	13.05	-0.38	-2.61	-1.51	-1.51	26.70	82.75 AED	1.00	12.64
DB ISLAMIC BK	4.79	0.84	-0.42	-0.62	-0.62	3.90	34.39 AED	0.95	13.89
EMAAR PROPERT	4.00	-0.74	-0.74	-3.85	-3.85	13.31	28.85 AED	0.52	11.70
Qatar									
QNB	17.85	0.17	-0.28	-0.56	-0.56	0.11	164.61 QAR	1.70	14.46
INDUSTRIES QAT	13.45	1.05	-2.13	0.45	0.45	22.45	80.53 QAR	2.42	24.89
QA ISLAMIC BK	17.08	-0.18	-0.99	-1.21	-1.21	-0.18	40.43 QAR	1.83	13.83
MASRAF AL RAYA	4.43	-0.18	-0.65	-0.58	-0.58	-2.14	33.31 QAR	2.44	15.12
MESAIEED PETRO	1.89	0.27	-0.21	0.21	0.21	-7.87	23.63 QAR	1.51	27.66
OMAN									
BANK MUSCAT	0.450	0.45	2.71	7.08	7.08	26.11	1.61 OMR	0.80	8.33
OMANTEL	0.784	0.00	-1.02	-2.01	-2.01	7.73	0.59 OMR	1.10	7.69
BANK DHOFAR	0.126	0.00	-3.08	0.80	0.80	29.90	0.38 QAR	0.54	14.93
NAT BANK OF OMAN	0.180	-4.26	-8.16	-10.00	-10.00	12.50	0.31 QAR	0.57	12.71
OMINVEST	0.320	0.00	-1.25	1.28	1.28	-6.51	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, Boursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is down today by -0.2 % The leading sector bottom performance indices today are Technology -7.21 % Consumer services -0.93 % Consumer Disc -0.77 % respectively

from YTD performance perspective the best sector performance is Financial services by 27.89 % while the bottom sector performance is Utilities by -19.5 %

Telecommunication sector is up today by + 0.45 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -17.25 %

KSA

Saudi Armco has a positive performance today by + 0.58 %, SABIC have negative performance today by -0.68%

STC has positive performance today by 0.94 %, Al Rajhi Bank has flat performance today

UAE

ETISALAT AD closed up today by 1.26 % , and act defensively with COVID19



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