



شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

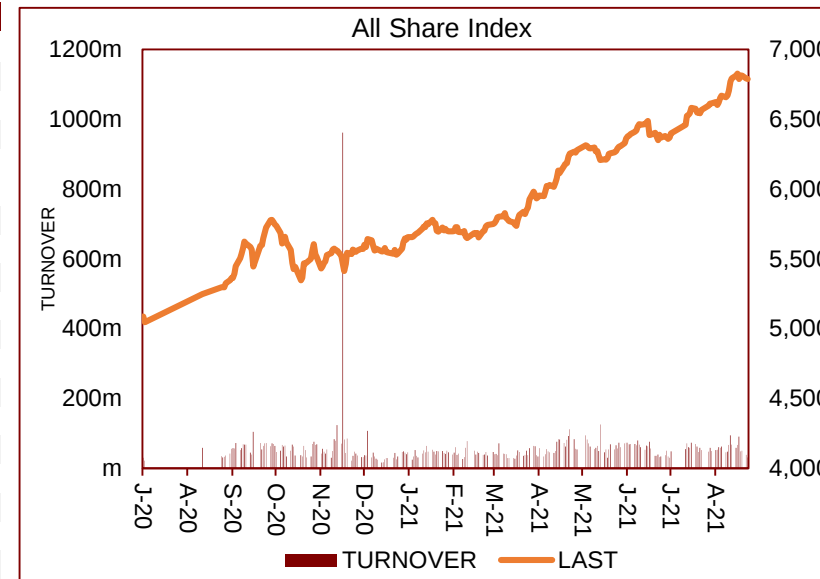
Monday, September 13, 2021





### Market Watch

| Description            | Close    | Day Δ | WTD   | MTD   | QTD    | YTD    | M Cap (in Bn) | PBV  | PE    |
|------------------------|----------|-------|-------|-------|--------|--------|---------------|------|-------|
| <b>Kuwait</b>          |          | %     | %     | %     | %      | %      |               |      |       |
| Kuwait All Share Index | 6,817.40 | 0.18  | 0.11  | 0.45  | 6.74   | 22.92  | 40.09 KWD     | 2.68 | 26.99 |
| Kuwait Premier Index   | 7,444.96 | 0.13  | -0.07 | 0.07  | 7.22   | 22.90  | 30.19 KWD     | 2.32 | 28.35 |
| Kuwait Main Index      | 5,579.23 | 0.32  | 0.16  | 1.10  | 4.73   | 22.31  | 9.90 KWD      | 3.78 | 22.94 |
| NIC 50                 | 8,287.30 | 0.14  | -0.12 | 0.00  | 7.15   | 22.90  | 28.60 KWD     | 1.57 | 15.56 |
| <b>Kuwait Sector</b>   |          |       |       |       |        |        |               |      |       |
| Banking                | 1,564.54 | 0.25  | -0.11 | 0.06  | 7.85   | 23.70  | 23.04 KWD     | 1.30 | 29.35 |
| Telecom                | 1,098.12 | 0.23  | 0.01  | -1.48 | 1.53   | -0.48  | 3.36 KWD      | 0.70 | 13.06 |
| Industrials            | 1,171.28 | -0.05 | -0.12 | 0.39  | 3.37   | 31.32  | 4.15 KWD      | 0.90 | 11.52 |
| Financial services     | 1,293.02 | 0.11  | 0.42  | 2.55  | 11.72  | 38.99  | 3.21 KWD      | 0.78 | 10.79 |
| Real estate            | 1,264.75 | 0.36  | 0.44  | 1.72  | 6.75   | 32.78  | 2.72 KWD      | 0.68 | 30.17 |
| Basic materials        | 1,064.82 | 0.08  | -0.35 | -1.66 | -2.80  | 18.50  | 0.95 KWD      | 1.92 | 11.67 |
| Health care            | 799.21   | 0.08  | 0.03  | 0.95  | 1.14   | -3.32  | 0.40 KWD      | 4.40 | 13.59 |
| Consumer services      | 745.79   | -0.28 | 0.46  | 1.06  | -4.63  | 0.20   | 0.56 KWD      | 1.03 | 9.86  |
| Insurance              | 1,494.67 | -1.22 | -0.99 | 2.42  | 7.88   | 29.28  | 0.64 KWD      | 0.83 | 9.29  |
| Consumer Disc          | 1,096.42 | 0.54  | 0.82  | 0.21  | 12.08  | 33.42  | 0.23 KWD      | 1.33 | 9.27  |
| Energy                 | 1,369.87 | 0.12  | 0.38  | 0.54  | -4.26  | 7.21   | 0.29 KWD      | 0.99 | 14.54 |
| Technology             | 698.40   | -3.81 | -4.95 | -4.19 | -15.04 | 38.93  | 0.01 KWD      | 0.85 | 0.00  |
| Utilities              | 623.68   | 0.00  | -0.42 | 1.72  | 3.95   | -14.44 | 0.26 KWD      | 4.98 | 20.59 |



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|--------------------------|-----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>GCC Markets</b>       |           | %     | %     | %     | %     | %     |               |      |       |
| Saudi (TASI)             | 11,386.38 | 0.38  | -0.54 | 0.33  | 3.39  | 30.69 | 9,796 SAR     | 2.79 | 20.43 |
| Qatar (QE Index)         | 11,083.71 | 0.05  | -0.35 | -0.28 | 3.08  | 5.99  | 557 QAR       | 1.59 | 16.01 |
| Dubai (DFMGI)            | 2,888.82  | -0.28 | -0.64 | -0.49 | 2.78  | 15.93 | 318 AED       | 1.58 | 19.73 |
| Abu Dhabi (ADI)          | 7,764.69  | -0.70 | -1.22 | 1.04  | 13.59 | 53.90 | 1,360 AED     | 1.77 | 23.97 |
| Bahrain (BAX)            | 1,668.29  | 0.11  | -0.09 | 1.39  | 5.06  | 11.98 | 17 BHD        | 1.17 | 11.03 |
| MUSCAT SE INDEX          | 3,962.68  | -0.03 | 0.06  | -0.10 | -2.48 | 8.31  | 5 OMR         | 0.91 | 13.25 |
| <b>Developed Markets</b> |           |       |       |       |       |       |               |      |       |
| MSCI World Index         | 3,122.07  | -0.45 | 0.00  | -0.61 | 3.47  | 16.06 |               |      |       |
| U.S. (S&P 500)           | 4,458.58  | 0.33  | -1.69 | -1.42 | 3.75  | 18.70 |               |      |       |
| U.K. (FTSE 100)          | 7,087.51  | 0.83  | 0.83  | -0.45 | 0.71  | 9.71  |               |      |       |
| Japan (Topix)            | 2,097.71  | 0.29  | 0.29  | 6.99  | 7.93  | 16.24 |               |      |       |
| <b>Emerging Markets</b>  |           |       |       |       |       |       |               |      |       |
| MSCI EM Index            | 1,308.94  | 0.69  | 0.00  | 0.02  | -4.78 | 1.37  |               |      |       |
| China (SSE Composite)    | 3,715.37  | 0.33  | 0.33  | 4.84  | 3.46  | 6.98  |               |      |       |
| India (Sensex)           | 58,177.76 | -0.22 | -0.21 | 1.10  | 10.86 | 21.85 |               |      |       |

### What Move the GCC markets ,

#### Oil Prices

Oil prices climbed on Monday to a one-week high in a second straight session of gains as concerns over U.S. supplies following damage from Hurricane Ida supported the market, along with expectations for higher demand, Brent crude rose 48 cents, or 0.7% to \$73.40 a barrel.

#### Kuwait Market

The market closed up today by + 0.18%, value traded 33.7 million KD, Premier market value traded reached 18.3 million KD and closed at 7,444 change by + 0.13%.

#### Saudi Market

The Market closed up today by + 0.38%, with positive macroeconomic sentiments bounce of oil reaching \$73.40 or + 0.7%.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



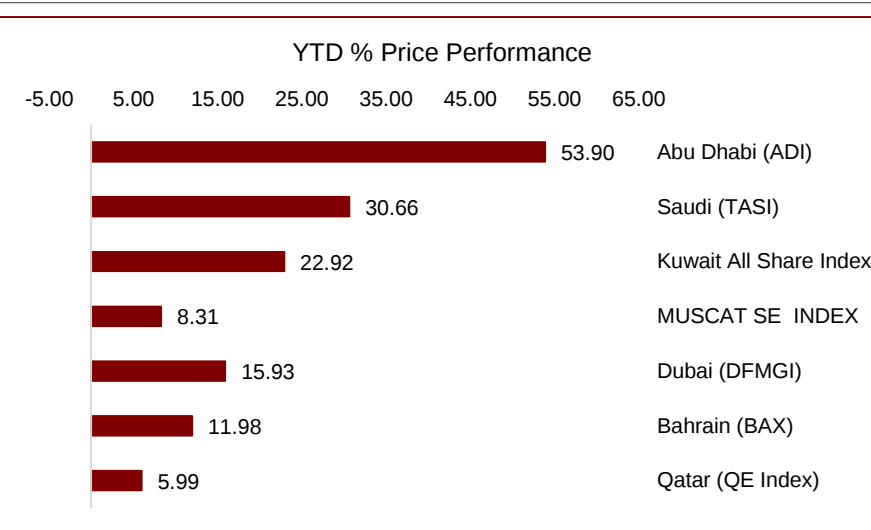
| Description                 | Close  | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|-----------------------------|--------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>Blue Chip Watch</b>      |        | %     | %     | %     | %     | %     |               |      |       |
| <b>Kuwait</b>               |        |       |       |       |       |       |               |      |       |
| NBK                         | 0.939  | 0.00  | 0.00  | 0.21  | 10.48 | 17.25 | 6.75 KWD      | 1.79 | 27.00 |
| KFH                         | 0.826  | 0.36  | 0.00  | -0.12 | 8.70  | 34.05 | 6.95 KWD      | 3.28 | 32.00 |
| Zain                        | 0.600  | 0.33  | 0.33  | -1.80 | 1.87  | -0.99 | 2.59 KWD      | 2.24 | 13.81 |
| BOUBYAN BANK                | 0.780  | 0.00  | -0.26 | -0.51 | 6.42  | 44.01 | 2.48 KWD      | 3.58 | 34.00 |
| Agility                     | 0.991  | 0.10  | -0.20 | -0.90 | 7.84  | 61.09 | 2.21 KWD      | 1.78 | 27.63 |
| <b>Saudi Arabia</b>         |        |       |       |       |       |       |               |      |       |
| ARAMCO                      | 35.05  | 0.29  | -0.14 | -0.71 | -0.57 | -0.29 | 6,990.00 SAR  | 6.79 | 26.30 |
| SABIC                       | 123.40 | 0.82  | -0.48 | 0.16  | 1.15  | 21.50 | 367.20 SAR    | 2.17 | 35.00 |
| STC                         | 135.00 | 1.20  | -1.33 | -1.04 | 1.52  | 26.04 | 266.80 SAR    | 4.17 | 24.32 |
| AL-RAJHI BANK               | 122.00 | -0.33 | -1.62 | 0.66  | 9.73  | 65.49 | 306.00 SAR    | 5.13 | 24.33 |
| NCB                         | 61.10  | 0.66  | -0.49 | 0.33  | 5.90  | 40.72 | 271.81 SAR    | 1.70 | 16.82 |
| <b>United Arab Emirates</b> |        |       |       |       |       |       |               |      |       |
| ETISALAT.AD                 | 24.40  | 0.25  | -1.13 | 3.39  | 10.91 | 44.38 | 211.69 AED    | 4.49 | 22.99 |
| FAB.AD                      | 18.02  | -1.31 | -1.53 | 6.00  | 7.90  | 39.69 | 199.40 AED    | 1.88 | 18.54 |
| EMIRATES NBD                | 14.10  | 0.36  | 0.71  | 1.81  | 6.42  | 36.89 | 88.75 AED     | 1.06 | 12.73 |
| DB ISLAMIC BK               | 5.03   | -0.20 | -0.98 | -1.37 | 4.36  | 9.11  | 36.49 AED     | 0.99 | 15.27 |
| EMAAR PROPERT               | 4.14   | -0.72 | -1.19 | -1.43 | -0.48 | 17.28 | 29.86 AED     | 0.53 | 13.75 |
| <b>Qatar</b>                |        |       |       |       |       |       |               |      |       |
| QNB                         | 19.05  | 0.26  | -0.52 | -1.04 | 5.68  | 6.39  | 174.16 QAR    | 1.82 | 15.42 |
| INDUSTRIES QAT              | 13.15  | 0.46  | 0.23  | 2.18  | -0.91 | 20.79 | 78.59 QAR     | 2.24 | 15.75 |
| QA ISLAMIC BK               | 18.14  | -0.71 | -1.31 | -1.31 | 4.45  | 5.55  | 42.84 QAR     | 1.88 | 14.25 |
| MASRAF AL RAYA              | 4.48   | 0.13  | -0.07 | -1.49 | 0.52  | -1.06 | 33.32 QAR     | 2.36 | 15.02 |
| MESAIEED PETRO              | 2.01   | 1.88  | 0.81  | 0.05  | 6.32  | -2.25 | 24.60 QAR     | 1.53 | 18.97 |
| <b>OMAN</b>                 |        |       |       |       |       |       |               |      |       |
| BANK MUSCAT                 | 0.440  | 0.00  | -0.45 | 0.00  | 3.77  | 22.22 | 1.57 OMR      | 0.77 | 8.33  |
| OMANTEL                     | 0.760  | 1.06  | 0.00  | -0.53 | -5.53 | 3.87  | 0.56 OMR      | 1.02 | 7.69  |
| BANK DHOFAR                 | 0.118  | 0.86  | 0.00  | 0.00  | -5.60 | 21.65 | 0.35 QAR      | 0.50 | 14.93 |
| NAT BANK OF OMAN            | 0.194  | 0.00  | 2.09  | 3.72  | -2.50 | 21.88 | 0.32 QAR      | 0.58 | 12.71 |
| OMINVEST                    | 0.314  | -0.63 | 0.64  | -0.63 | 1.28  | -6.51 | 0.26 QAR      | 0.94 | 6.85  |

| Foreign Holding |        |        |       |       |         |       |       |        |       |       |
|-----------------|--------|--------|-------|-------|---------|-------|-------|--------|-------|-------|
| Date            | NBK    | GBK    | CBK   | ABK   | MUTAHED | KIB   | BURG  | KFH    | BOUB  | WARBA |
| 1-Sep-21        | 20.55% | 10.95% | 0.06% | 0.36% | 0.35%   | 4.84% | 2.70% | 10.80% | 5.14% | 4.23% |
| 8-Sep-21        | 20.66% | 10.81% | 0.06% | 0.35% | 0.35%   | 4.68% | 2.71% | 10.89% | 5.22% | 4.17% |

### End of Report

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### Leading Sector Performance

The market is up today by + 0.18 %The leading sector best performance indices today are Real estate 0.36 % Banking 0.25 % Telecom 0.23 % respectively

The market is up today by + 0.58 %The leading sector best performance indices today are Consumer Disc 0.89 % Industrials 0.62 % Consumer services 0.54 % respectively

Telecommunication sector are up today by + 0.23 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-23.4 %

### KSA

Saudi Armco has positive performance today by + 0.29 %, SABIC has positive performance today by + 0.82 %

STC has a positive performance today by + 1.2 %, Al Rajhi Bank have negative performance today by -0.33 %

### UAE

ETISALAT AD closed up today by + 0.25%, and act defensively with COVID19



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NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | [www.nic.com.kw](http://www.nic.com.kw)