

شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MORNING BRIEF

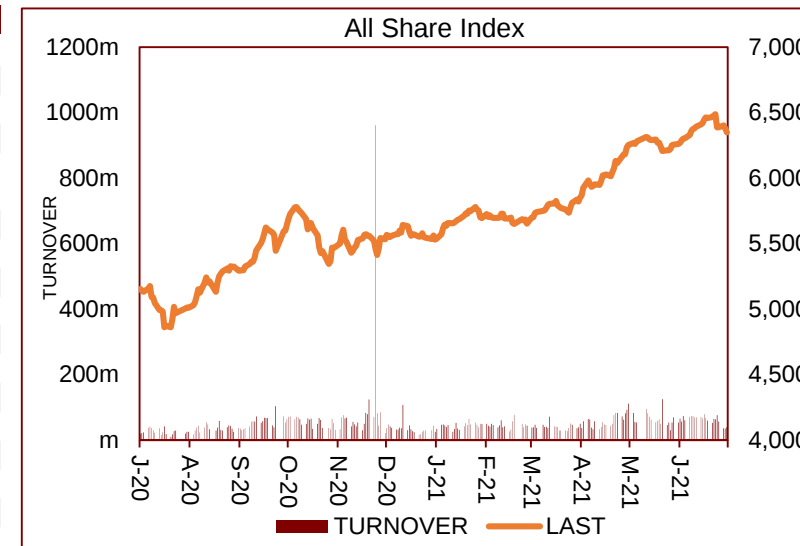
Wednesday, July 14, 2021



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,368.45	0.17	0.02	-0.29	-0.29	14.83	37.41 KWD	2.11	33.81
Kuwait Premier Index	6,904.76	0.16	-0.17	-0.40	-0.40	14.17	28.03 KWD	2.26	35.66
Kuwait Main Index	5,328.44	0.18	0.76	0.22	0.22	17.05	9.38 KWD	1.65	28.47
NIC 50	7,691.65	0.14	-0.22	-0.47	-0.47	14.17	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,438.62	0.19	-0.24	-0.65	-0.65	13.95	21.24 KWD	1.38	36.66
Telecom	1,076.59	0.28	0.65	-0.36	-0.36	-2.33	3.29 KWD	0.64	13.90
Industrials	1,125.16	0.27	-1.32	-0.61	-0.61	26.27	3.98 KWD	0.81	13.85
Financial services	1,190.46	0.12	2.19	2.93	2.93	28.05	3.00 KWD	0.80	11.32
Real estate	1,177.11	0.27	0.23	-0.66	-0.66	23.56	2.52 KWD	0.70	44.37
Basic materials	1,084.42	-0.06	-0.59	-1.01	-1.01	20.68	0.97 KWD	1.88	11.49
Health care	807.02	-0.10	0.46	2.13	2.13	-2.37	0.40 KWD	3.89	39.71
Consumer services	762.24	-0.63	-2.16	-2.80	-2.80	2.13	0.51 KWD	0.95	9.81
Insurance	1,374.34	-0.89	2.54	-0.81	-0.81	18.87	0.53 KWD	0.82	9.45
Consumer Disc	994.09	-0.07	1.39	2.01	2.01	21.44	0.23 KWD	1.32	8.58
Energy	1,419.73	0.06	0.23	-0.74	-0.74	11.15	0.30 KWD	1.06	14.22
Technology	749.33	0.00	-8.85	-8.85	-8.85	49.06	0.01 KWD	0.87	0.00
Utilities	584.21	0.00	0.00	-2.63	-2.63	-19.86	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)	10,778.07	0.39	-0.76	-2.20	-2.20	23.63	9,593 SAR	2.76	21.92
Qatar (QE Index)	10,775.97	0.07	-0.83	0.21	0.21	3.04	556 QAR	1.54	19.19
Dubai (DFMGI)	2,755.45	-0.20	-0.87	-1.96	-1.96	10.57	303 AED	1.39	11.51
Abu Dhabi (ADI)	7,079.50	0.47	1.67	3.57	3.57	40.32	998 AED	1.95	11.61
Bahrain (BAX)	1,576.28	0.29	0.08	-0.74	-0.74	5.81	16 BHD	1.23	23.36
MUSCAT SE INDEX	4,085.53	-0.04	-0.85	0.54	0.54	11.66	5 OMR	0.90	13.25
Developed Markets									
MSCI World Index	3,058.59	-0.02	0.20	1.39	1.39	13.73			
U.S. (S&P 500)	4,374.30	0.12	-0.01	1.67	1.67	16.32			
U.K. (FTSE 100)	7,091.19	-0.47	-0.56	0.63	0.63	9.62			
Japan (Topix)	1,963.16	-0.23	2.66	1.01	1.01	8.78			
Emerging Markets									
MSCI EM Index	1,338.13	-0.10	1.62	-2.56	-2.56	3.74			
China (SSE Composite)	3,528.50	-1.07	0.13	-1.75	-1.75	1.60			
India (Sensex)	52,904.05	0.25	0.92	0.73	0.73	10.71			



What Move the GCC markets ,

Oil Prices

Oil prices fell on Wednesday on future demand concerns after data showed that China's first-half crude imports dropped, but were still holding near a one-week high amid concerns about supplies as the world recovers from the coronavirus pandemic, Brent crude was down 8 cents, or 0.1%, at \$76.41 a barrel.

Kuwait Market

The market closed up by 0.17%, value traded 30.2 million KD, Premier market value traded reached 15.9 million KD and closed at 6,904 change by 0.16%.

Saudi Market

The Market closed up today by 0.39%, today market Performance is linked to oil prices raised to \$76.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



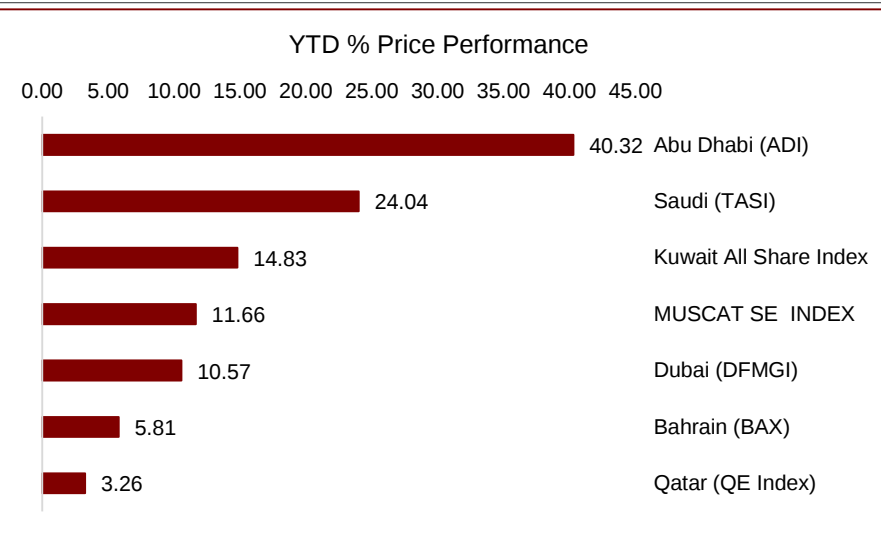
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.855	-0.23	0.71	0.94	0.94	7.13	6.16 KWD	1.59	27.00
KFH	0.755	0.40	-0.26	-0.66	-0.66	22.51	6.34 KWD	3.37	32.00
Zain	0.586	0.17	0.34	-0.68	-0.68	-3.47	2.53 KWD	2.26	13.90
BOUBYAN BANK	0.730	-0.41	-2.14	0.00	0.00	35.32	2.33 KWD	3.83	34.00
Agility	0.941	0.32	0.21	2.40	2.40	52.96	2.09 KWD	1.71	46.56
Saudi Arabia									
ARAMCO	35.00	0.72	0.00	-0.71	-0.71	-0.43	6,949.26 SAR	6.87	34.52
SABIC	118.20	1.03	0.34	-3.61	-3.61	15.78	350.96 SAR	2.05	35.00
STC	127.20	-1.40	-0.31	-2.43	-2.43	21.13	257.97 SAR	3.96	23.16
AL-RAJHI BANK	108.00	0.37	-0.55	-2.88	-2.88	46.47	268.97 SAR	4.54	23.29
NCB	56.00	1.45	-1.95	-3.99	-3.99	27.57	247.16 SAR	1.98	14.25
United Arab Emirates									
ETISALAT.AD	22.50	-0.35	1.17	2.27	2.27	33.14	196.37 AED	4.40	21.35
FAB.AD	16.40	0.12	0.24	-1.80	-1.80	27.13	178.87 AED	1.74	17.40
EMIRATES NBD	13.25	1.53	-1.12	0.00	0.00	28.64	82.43 AED	1.00	12.60
DB ISLAMIC BK	4.75	-0.84	-1.25	-1.45	-1.45	3.04	34.68 AED	0.96	14.01
EMAAR PROPERT	3.99	-0.25	-0.99	-4.09	-4.09	13.03	28.64 AED	0.51	11.62
Qatar									
QNB	18.08	1.29	-0.11	-0.39	-0.39	0.28	167.65 QAR	1.71	14.48
INDUSTRIES QAT	13.36	-0.67	-2.13	0.45	0.45	22.45	82.75 QAR	2.45	25.15
QA ISLAMIC BK	17.10	0.12	-0.81	-1.04	-1.04	0.00	41.04 QAR	1.82	13.81
MASRAF AL RAYA	4.43	-0.07	-0.67	-0.61	-0.61	-2.16	33.81 QAR	2.43	15.09
MESAIEED PETRO	1.90	0.48	0.26	0.69	0.69	-7.43	24.09 QAR	1.52	27.74
OMAN									
BANK MUSCAT	0.458	1.33	3.62	8.02	8.02	27.22	1.61 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	0.126	0.00	-3.08	0.80	0.80	29.90	0.38 QAR	0.54	14.93
NAT BANK OF OMAN	0.184	2.22	-6.12	-8.00	-8.00	15.00	0.29 QAR	0.54	12.71
OMINVEST	0.320	0.00	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, Boursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is up today by + 0.17 % The leading sector best performance indices today are Real estate 0.27 % Industrials 0.27 % Banking 0.19 % respectively

from YTD performance perspective the best sector performance is Financial services by 28.05 % while the bottom sector performance is Utilities by -19.86 %

Telecommunication sector is up today by + 0.28 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -17.16 %

KSA

Saudi Armco has a positive performance today by + 0.72 %, SABIC have positive performance today by + 1.03 %

STC has negative performance today by -1.40 %, Al Rajhi Bank has a positive performance today by + 0.37 %

UAE

ETISALAT AD closed down today by - 0.35 % , and act defensively with COVID19



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