



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



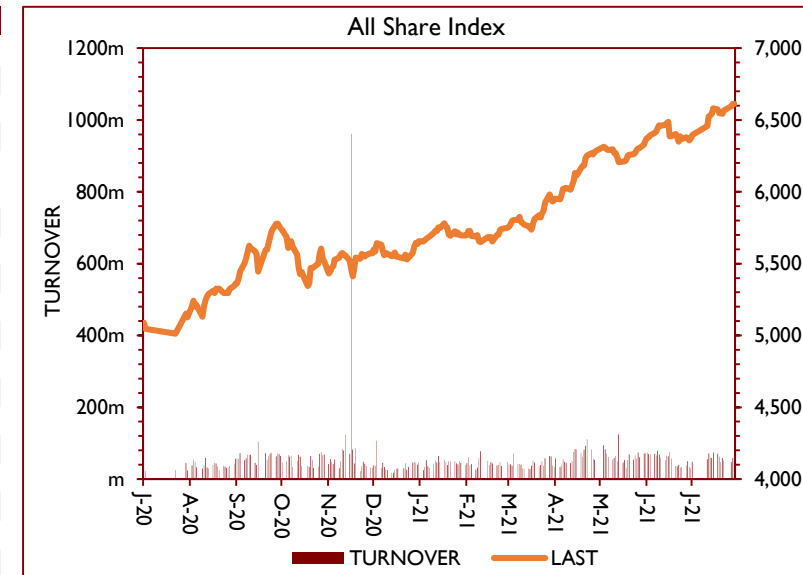
## GCC DAILY MORNING BRIEF

Sunday, August 15, 2021



### Market Watch

| Description            | Close    | Day Δ | WTD   | MTD   | QTD   | YTD    | M Cap (in Bn) | PBV  | PE    |
|------------------------|----------|-------|-------|-------|-------|--------|---------------|------|-------|
| <b>Kuwait</b>          |          | %     | %     | %     | %     | %      |               |      |       |
| Kuwait All Share Index | 6,621.48 | 0.13  | 0.86  | 0.63  | 3.69  | 19.41  | 38.84 KWD     | 2.11 | 29.12 |
| Kuwait Premier Index   | 7,219.60 | 0.16  | 0.95  | 0.79  | 4.11  | 19.33  | 29.24 KWD     | 2.25 | 29.46 |
| Kuwait Main Index      | 5,445.23 | 0.06  | 0.07  | 0.15  | 2.42  | 19.62  | 9.60 KWD      | 1.67 | 28.30 |
| NIC 50                 | 8,035.48 | 0.05  | 0.90  | 0.71  | 4.04  | 19.33  | 28.60 KWD     | 1.57 | 15.56 |
| <b>Kuwait Sector</b>   |          |       |       |       |       |        |               |      |       |
| Banking                | 1,512.34 | 0.35  | 0.35  | 0.78  | 4.44  | 19.79  | 22.24 KWD     | 1.38 | 30.46 |
| Telecom                | 1,081.82 | -0.19 | -0.19 | -0.74 | 0.13  | -1.86  | 3.32 KWD      | 0.73 | 13.65 |
| Industrials            | 1,160.04 | -0.31 | -0.31 | 0.04  | 2.47  | 30.18  | 4.12 KWD      | 0.82 | 14.44 |
| Financial services     | 1,252.48 | 0.33  | 0.33  | 2.93  | 8.29  | 34.72  | 3.10 KWD      | 0.78 | 7.90  |
| Real estate            | 1,219.82 | -0.56 | -0.56 | 0.87  | 2.95  | 28.05  | 2.63 KWD      | 0.71 | 37.45 |
| Basic materials        | 1,060.83 | 0.56  | 0.56  | -1.51 | -3.16 | 18.06  | 0.95 KWD      | 1.91 | 11.48 |
| Health care            | 813.17   | 0.75  | 0.75  | 1.55  | 2.91  | -1.63  | 0.40 KWD      | 3.72 | 39.71 |
| Consumer services      | 743.37   | -0.65 | -0.65 | -3.64 | -5.21 | -0.40  | 0.52 KWD      | 0.90 | 7.54  |
| Insurance              | 1,414.62 | 0.18  | 0.18  | 0.70  | 2.10  | 22.35  | 0.54 KWD      | 0.90 | 9.47  |
| Consumer Disc          | 1,012.25 | -1.34 | -1.34 | -2.23 | 3.88  | 23.66  | 0.23 KWD      | 1.31 | 9.29  |
| Energy                 | 1,380.82 | -0.98 | -0.98 | -2.49 | -3.46 | 8.10   | 0.29 KWD      | 1.01 | 13.97 |
| Technology             | 785.70   | 7.89  | 7.89  | 3.85  | -4.43 | 56.30  | 0.01 KWD      | 0.92 | 0.00  |
| Utilities              | 589.47   | 0.00  | -0.89 | -1.32 | -1.75 | -19.13 | 0.25 KWD      | 4.69 | 19.55 |



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|--------------------------|-----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>GCC Markets</b>       |           | %     | %     | %     | %     | %     |               |      |       |
| Saudi (TASI)             | 11,351.63 | 0.25  | 0.13  | 2.96  | 3.22  | 30.48 | 9,840 SAR     | 2.81 | 20.81 |
| Qatar (QE Index)         | 10,933.06 | 0.12  | 0.31  | 1.75  | 1.97  | 4.85  | 558 QAR       | 1.54 | 15.85 |
| Dubai (DFMGI)            | 2,815.96  | 0.05  | -0.16 | 1.82  | 0.19  | 13.00 | 308 AED       | 1.51 | 20.87 |
| Abu Dhabi (ADI)          | 7,601.64  | 0.10  | 2.46  | 3.87  | 11.21 | 50.67 | 1,349 AED     | 1.71 | 23.81 |
| Bahrain (BAX)            | 1,636.43  | 0.33  | 1.33  | 2.47  | 3.05  | 9.84  | 17 BHD        | 1.17 | 11.22 |
| MUSCAT SE INDEX          | 4,019.42  | 0.43  | 0.43  | -0.27 | -1.08 | 9.86  | 5 OMR         | 0.92 | 13.25 |
| <b>Developed Markets</b> |           |       |       |       |       |       |               |      |       |
| MSCI World Index         | 3,125.12  | 0.30  | 0.87  | 1.82  | 3.58  | 16.17 |               |      |       |
| U.S. (S&P 500)           | 4,468.00  | 0.33  | 0.70  | 1.65  | 3.96  | 18.95 |               |      |       |
| U.K. (FTSE 100)          | 7,218.71  | 0.35  | 1.34  | 2.65  | 2.58  | 11.74 |               |      |       |
| Japan (Topix)            | 1,956.39  | 0.15  | 1.40  | 2.91  | 0.66  | 8.41  |               |      |       |
| <b>Emerging Markets</b>  |           |       |       |       |       |       |               |      |       |
| MSCI EM Index            | 1,280.86  | -0.78 | -0.90 | 0.24  | -6.82 | -0.81 |               |      |       |
| China (SSE Composite)    | 3,516.30  | -0.24 | 1.68  | 3.50  | -2.09 | 1.24  |               |      |       |
| India (Sensex)           | 55,437.29 | 1.08  | 2.14  | 5.42  | 5.63  | 16.10 |               |      |       |

### What Move the GCC markets ,

#### Oil Prices

Oil prices fell for a second day on Friday after the International Energy Agency warned that demand growth for crude and its products had slowed sharply as surging COVID-19 cases worldwide forced governments to revive movement restrictions. Brent crude was down 21 cents, or 0.3%, at \$71.10 per barrel, after dropping 13 cents in the previous session.

#### Kuwait Market

The market closed up by 0.13%, value traded 52.6 million KD, Premier market value traded reached 27.1 million KD and closed at 7,219 change by 0.16%.

#### Saudi Market

The Market closed up today by +0.25%, with positive macroeconomic sentiments bounce of oil +0.3% recouping some of the losses in the previous session when prices hit a three-week low.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



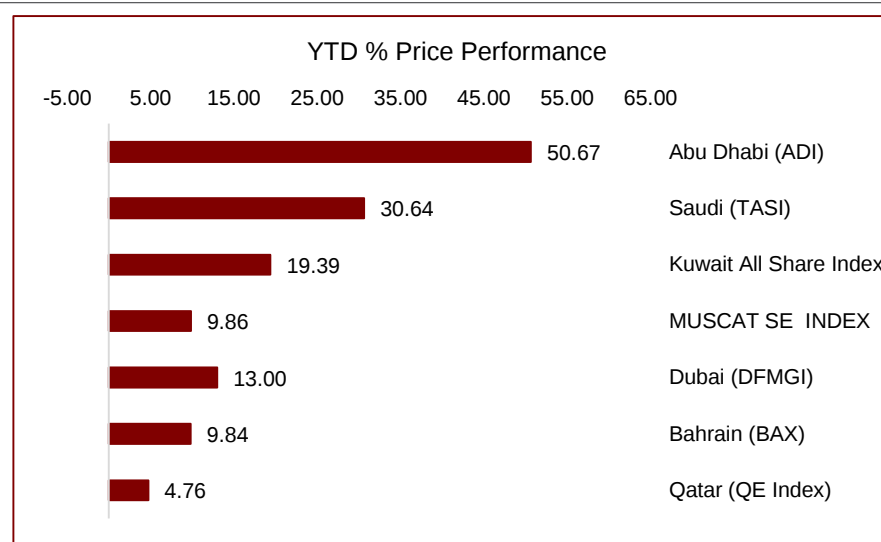
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|-----------------------------|--------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>Blue Chip Watch</b>      |        | %     | %     | %     | %     | %     |               |      |       |
| <b>Kuwait</b>               |        |       |       |       |       |       |               |      |       |
| NBK                         | 0.890  | -0.11 | -0.11 | -0.45 | 4.83  | 11.25 | 6.40 KWD      | 1.69 | 27.00 |
| KFH                         | 0.788  | 0.13  | 0.38  | 0.38  | 3.82  | 28.04 | 6.65 KWD      | 3.15 | 32.00 |
| Zain                        | 0.590  | -0.17 | 0.17  | -0.17 | 0.17  | -2.64 | 2.55 KWD      | 2.21 | 13.65 |
| BOUBYAN BANK                | 0.788  | -0.13 | 3.56  | -1.87 | 7.24  | 45.11 | 2.51 KWD      | 3.62 | 34.00 |
| Agility                     | 1.005  | -0.10 | 3.39  | 2.03  | 9.59  | 63.70 | 2.24 KWD      | 1.83 | 49.94 |
| <b>Saudi Arabia</b>         |        |       |       |       |       |       |               |      |       |
| ARAMCO                      | 35.35  | 0.43  | 0.43  | 1.00  | 0.28  | 0.57  | 7,040.00 SAR  | 6.83 | 26.53 |
| SABIC                       | 123.60 | 0.65  | -1.12 | 2.31  | 1.64  | 22.09 | 368.40 SAR    | 2.18 | 35.00 |
| STC                         | 135.40 | -0.59 | -1.60 | 1.19  | 3.04  | 27.92 | 272.40 SAR    | 4.26 | 24.47 |
| AL-RAJHI BANK               | 121.80 | 0.66  | 3.75  | 9.55  | 9.55  | 65.22 | 302.50 SAR    | 5.07 | 23.47 |
| NCB                         | 59.10  | -1.50 | 2.78  | 7.45  | 2.60  | 36.33 | 268.68 SAR    | 2.16 | 17.14 |
| <b>United Arab Emirates</b> |        |       |       |       |       |       |               |      |       |
| ETISALAT.AD                 | 24.08  | -0.08 | 0.33  | 5.61  | 9.45  | 42.49 | 209.59 AED    | 4.45 | 22.77 |
| FAB.AD                      | 16.76  | 0.36  | 0.72  | 1.09  | 0.36  | 29.92 | 182.36 AED    | 1.72 | 16.95 |
| EMIRATES NBD                | 13.40  | 0.00  | 0.00  | 0.00  | 1.13  | 30.10 | 84.64 AED     | 1.01 | 12.14 |
| DB ISLAMIC BK               | 5.01   | -0.20 | -1.18 | 3.73  | 3.94  | 8.68  | 36.28 AED     | 0.98 | 15.21 |
| EMAAR PROPERT               | 4.05   | 0.25  | -0.74 | 1.76  | -2.64 | 14.73 | 29.00 AED     | 0.52 | 13.32 |
| <b>Qatar</b>                |        |       |       |       |       |       |               |      |       |
| QNB                         | 19.00  | -0.21 | 3.71  | 4.40  | 5.85  | 6.56  | 175.49 QAR    | 1.82 | 15.45 |
| INDUSTRIES QAT              | 13.31  | -0.15 | -0.15 | 0.00  | 0.75  | 22.82 | 80.53 QAR     | 2.28 | 16.04 |
| QA ISLAMIC BK               | 17.27  | -0.06 | -0.06 | 0.41  | 0.00  | 1.05  | 40.81 QAR     | 1.77 | 13.48 |
| MASRAF AL RAYA              | 4.41   | 0.25  | -0.99 | 1.99  | -1.19 | -2.74 | 33.04 QAR     | 2.32 | 14.74 |
| MESAIEED PETRO              | 1.97   | 0.05  | -0.95 | 3.09  | 4.73  | -3.71 | 24.75 QAR     | 1.53 | 18.93 |
| <b>OMAN</b>                 |        |       |       |       |       |       |               |      |       |
| BANK MUSCAT                 | 0.446  | 0.91  | 0.00  | -0.45 | 5.19  | 23.89 | 1.58 OMR      | 0.77 | 8.33  |
| OMANTEL                     | 0.776  | 0.00  | -2.02 | -2.02 | -2.51 | 7.18  | 0.58 OMR      | 1.05 | 7.69  |
| BANK DHOFAR                 | 0.123  | 2.50  | 2.50  | 0.00  | -1.60 | 26.80 | 0.36 QAR      | 0.52 | 14.93 |
| NAT BANK OF OMAN            | 0.188  | 1.08  | 5.62  | 1.62  | -6.00 | 17.50 | 0.30 QAR      | 0.55 | 12.71 |
| OMINVEST                    | 0.318  | 0.63  | 0.63  | 1.27  | 1.92  | -5.92 | 0.26 QAR      | 0.98 | 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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### Leading Sector Performance

The market is up today by + 0.13 %The leading sector best performance indices today are Health care 0.75 % Basic materials 0.56 % Banking 0.35 % 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 down today by -0.19 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-21.27 %

### KSA

Saudi Armco positive performance today by + 0.43 %, SABIC have positive performance today by + 0.65 %

STC have negative performance today by -0.59 %, Al Rajhi Bank has a positive performance today by + 0.66 %

### UAE

ETISALAT AD closed down today by -0.08%, 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)