



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, November 17, 2021

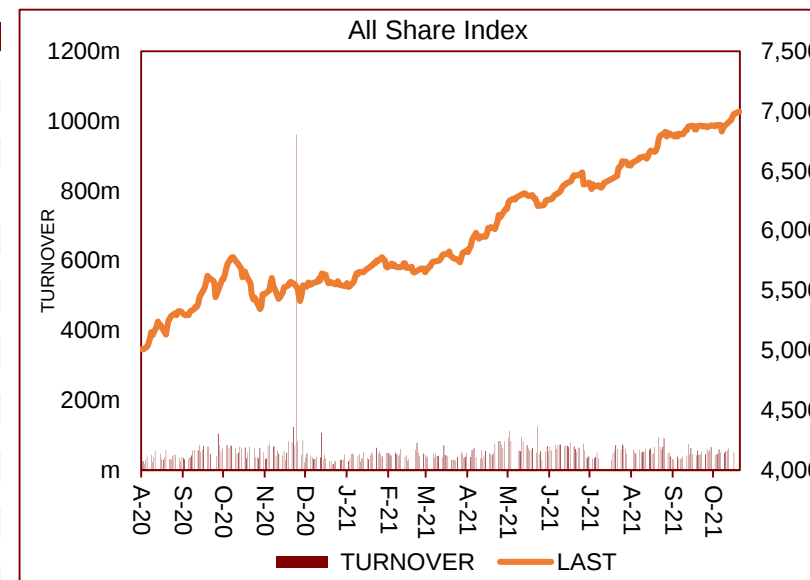




Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,271.10	0.08	-0.63	2.31	5.93	31.12	43.04 KWD	2.13	26.68
Kuwait Premier Index	7,866.22	0.03	-0.79	2.23	4.90	29.96	32.13 KWD	2.29	27.01
Kuwait Main Index	6,123.53	0.24	-0.28	2.43	8.99	34.51	10.91 KWD	1.66	25.86
NIC 50	8,852.99	0.44	-0.84	2.15	4.83	29.96	28.60 KWD	2.27	26.01
Kuwait Sector									
Banking	1,659.34	0.01	-0.79	2.43	5.27	31.44	24.60 KWD	1.25	28.01
Telecom	1,099.73	0.02	-0.90	-0.31	0.38	-0.23	3.37 KWD	0.97	13.62
Industrials	1,232.36	0.16	0.36	2.43	5.59	38.30	4.37 KWD	1.05	12.34
Financial services	1,471.26	0.60	-0.16	2.29	11.55	58.25	3.76 KWD	0.94	15.78
Real estate	1,408.79	-0.31	-1.20	2.89	10.11	47.88	3.05 KWD	0.81	28.76
Basic materials	1,099.11	0.25	-0.23	-0.04	0.96	22.32	0.98 KWD	1.82	29.44
Health care	798.89	0.88	0.51	0.51	0.38	-3.36	0.39 KWD	4.58	11.61
Consumer services	760.89	1.22	-0.90	-1.94	-2.89	1.95	0.71 KWD	1.08	19.23
Insurance	1,637.36	1.95	3.20	10.83	12.92	41.62	0.67 KWD	0.86	9.96
Consumer Disc	1,360.86	-0.61	-1.78	7.67	21.81	66.24	0.23 KWD	1.35	9.14
Energy	1,446.51	-2.56	-7.23	-0.85	5.06	13.24	0.31 KWD	1.09	14.92
Technology	771.15	1.92	-1.85	0.00	7.94	53.40	0.01 KWD	0.89	0.00
Utilities	628.95	0.00	-2.05	1.27	0.85	-13.72	0.26 KWD	4.24	20.31

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,833.54	0.05	-0.65	1.00	2.83	36.04	10,400 SAR	2.53	18.99
Qatar (QE Index)	11,959.48	-0.29	-0.70	1.63	4.11	14.57	606 QAR	1.74	16.46
Dubai (DFMGI)	3,261.66	-0.78	3.84	13.88	14.63	30.89	355 AED	1.64	25.37
Abu Dhabi (ADI)	8,337.69	-0.17	0.63	6.01	8.30	65.26	1,413 AED	1.85	23.14
Bahrain (BAX)	1,786.86	-0.03	-0.14	2.51	4.77	19.94	18 BHD	1.52	10.12
MUSCAT SE INDEX	4,050.23	0.44	0.96	-0.61	2.73	10.70	5 OMR	0.87	13.25
Developed Markets									
MSCI World Index	3,231.95	0.17	0.25	1.80	7.50	20.15			
U.S. (S&P 500)	4,700.90	0.33	0.39	2.07	9.13	25.15			
U.K. (FTSE 100)	7,305.14	-0.30	-0.58	0.93	3.09	13.07			
Japan (Topix)	2,038.34	-0.61	-0.11	1.86	0.40	12.95			
Emerging Markets									
MSCI EM Index	1,290.55	0.29	0.39	2.04	2.99	-0.06			
China (SSE Composite)	3,537.37	0.44	-0.05	-0.28	-0.86	1.85			
India (Sensex)	60,008.33	-0.52	-1.16	1.14	1.44	25.61			



What Move the GCC markets ,

Oil Prices

Oil prices dropped on Wednesday after U.S. gasoline stocks fell more than expected last week, which could heighten pressure on the Biden administration to release oil from emergency reserves to cap soaring gasoline prices, Brent crude futures fell 72 cents, or 0.9%, to \$82.71, erasing a 38 cent gain from Tuesday.

Kuwait Market

The market closed today up by + 0.08%, value traded 73.3 million KD, Premier market value traded reached 29.5 million KD and closed at 7,866.22 up by + 0.03%.

Saudi Market

The Market closed up by + 0.05%, with positive macroeconomic sentiments bounce of oil reaching \$82.71 or - 0.9%.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



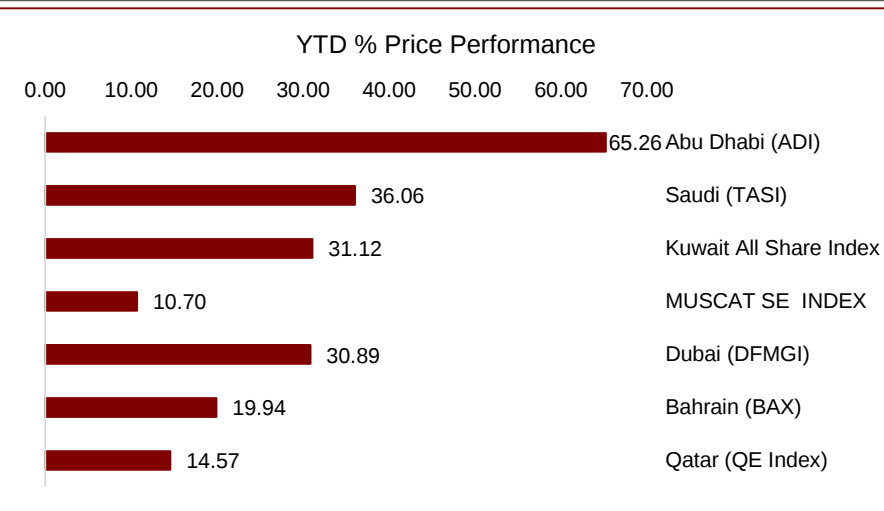
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.038	0.10	-1.24	4.75	8.81	29.63	7.47 KWD	1.92	27.00
KFH	0.843	-0.12	-0.47	0.84	2.55	36.97	7.13 KWD	3.28	32.00
Zain	0.596	0.17	-1.16	-0.50	-0.50	-1.65	2.58 KWD	2.17	13.62
BOUBYAN BANK	0.816	-0.73	-0.12	4.71	7.03	51.95	2.62 KWD	3.72	34.00
Agility	1.043	0.10	2.06	5.47	5.79	69.56	2.33 KWD	1.06	2.22
Saudi Arabia									
ARAMCO	37.05	-0.27	-1.33	-2.24	2.92	5.86	7,430.20 SAR	6.95	22.53
SABIC	127.40	-0.93	-0.47	0.79	0.31	26.04	385.81 SAR	2.22	35.00
STC	116.00	0.00	0.52	0.52	-8.82	9.25	232.01 SAR	3.38	20.43
AL-RAJHI BANK	147.40	-0.41	-0.81	6.33	20.55	100.82	370.01 SAR	5.81	26.74
NCB	69.60	1.75	-1.43	5.83	12.38	59.17	306.30 SAR	1.90	19.61
United Arab Emirates									
ETISALAT.AD	28.00	-1.41	0.72	9.38	16.57	65.68	246.99 AED	5.36	26.76
FAB.AD	19.70	0.41	3.03	10.67	10.80	52.71	214.25 AED	1.96	17.63
EMIRATES NBD	14.20	0.00	-0.35	3.27	0.00	37.86	89.70 AED	1.05	11.24
DB ISLAMIC BK	5.54	-0.18	2.78	8.41	11.92	20.17	40.19 AED	1.05	14.80
EMAAR PROPERT	5.08	-1.93	5.18	25.74	24.51	43.91	37.09 AED	0.65	13.44
Qatar									
QNB	21.00	0.05	-0.24	2.94	9.66	17.78	193.87 QAR	1.93	16.46
INDUSTRIES QAT	15.85	-0.56	-0.50	-2.04	2.72	46.00	96.44 QAR	2.58	14.48
QA ISLAMIC BK	18.30	0.00	-0.16	0.38	0.11	6.78	43.24 QAR	1.81	13.65
MASRAF AL RAYA	4.86	-0.49	-1.83	3.57	8.69	7.46	36.65 QAR	2.47	16.46
MESAIEED PETRO	2.31	-0.26	-1.11	5.64	2.97	13.53	29.12 QAR	1.74	17.76
OMAN									
BANK MUSCAT	0.492	0.00	1.23	1.23	9.33	36.67	1.76 OMR	0.84	8.33
OMANTEL	0.740	0.00	0.00	-3.14	0.00	2.21	0.56 OMR	0.99	7.69
BANK DHOFAR	0.132	0.00	1.54	1.54	12.82	36.08	0.40 QAR	0.56	14.93
NAT BANK OF OMAN	0.192	0.00	-1.03	-1.03	3.78	20.00	0.31 QAR	0.57	12.71
OMINVEST	0.310	1.31	-1.90	0.00	-1.27	-8.28	0.25 QAR	0.91	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
10-Nov-21	20.82%	10.79%	0.06%	0.32%	0.40%	4.62%	2.73%	10.78%	5.28%	4.33%
17-Nov-21	20.92%	11.68%	0.06%	0.29%	0.41%	4.63%	2.76%	10.64%	5.28%	4.33%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is up today by + 0.08 %The leading sector best performance indices today are Technology 1.92 % Consumer services 1.22 % Health care 0.88 % respectively

Telecommunication sector are up today by + 0.02 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-31.35 %

KSA

Saudi Armco has a negative performance today by -0.27 %, SABIC has a negative performance today by -0.93 %

STC has a flat performance today, Al Rajhi Bank has a negative performance today by - 0.41 %

UAE

ETISALAT AD closed down today by - 1.41 %, and act defensively with COVID19



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