

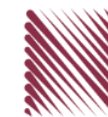


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, October 18, 2021

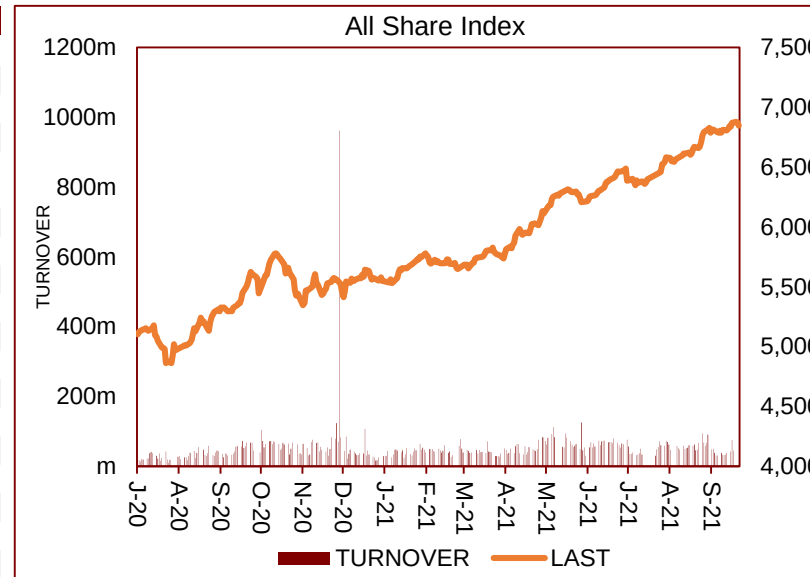




Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,923.94	0.15	0.63	0.95	0.95	24.95	40.74 KWD	2.72	26.78
Kuwait Premier Index	7,492.75	0.15	0.51	0.04	0.04	23.93	30.38 KWD	2.31	28.27
Kuwait Main Index	5,826.43	0.14	1.02	3.78	3.78	28.09	10.36 KWD	3.91	22.58
NIC 50	8,351.41	0.14	0.46	-0.04	-0.03	23.93	28.60 KWD	2.29	27.27
Kuwait Sector									
Banking	1,578.34	0.26	0.67	0.13	0.13	25.02	23.25 KWD	1.30	29.27
Telecom	1,102.50	-0.04	0.24	0.63	0.63	0.02	3.38 KWD	0.75	13.19
Industrials	1,167.58	-0.11	0.12	0.04	0.04	31.03	4.14 KWD	0.90	12.15
Financial services	1,374.79	0.05	0.95	4.24	4.24	47.87	3.45 KWD	0.85	11.68
Real estate	1,317.01	0.36	1.10	2.94	2.94	38.25	2.83 KWD	0.79	28.94
Basic materials	1,103.36	-1.26	-2.91	1.35	1.35	22.79	1.00 KWD	1.91	12.80
Health care	789.55	-0.67	-0.65	-0.80	-0.80	-4.49	0.39 KWD	4.55	13.23
Consumer services	786.58	-0.04	-0.56	0.39	0.39	5.39	0.60 KWD	1.11	10.84
Insurance	1,465.10	0.03	-0.04	1.04	1.04	26.72	0.61 KWD	0.82	9.97
Consumer Disc	1,178.00	1.10	2.02	5.44	5.44	43.90	0.24 KWD	1.39	9.82
Energy	1,433.51	0.75	2.18	4.12	4.12	12.23	0.30 KWD	1.08	14.37
Technology	727.50	0.00	2.15	1.83	1.83	44.72	0.01 KWD	0.85	0.00
Utilities	618.42	0.00	0.43	-0.84	-0.84	-15.16	0.26 KWD	4.92	20.33

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,758.02	-0.13	0.60	2.38	2.38	35.31	10,458 SAR	2.71	20.27
Qatar (QE Index)	11,743.35	-0.07	0.74	2.31	2.31	12.53	596 QAR	1.78	16.75
Dubai (DFMGI)	2,817.17	0.54	0.74	-1.24	-1.24	13.05	309 AED	1.60	18.97
Abu Dhabi (ADI)	7,893.01	0.74	0.61	2.08	2.08	56.44	1,368 AED	1.83	24.31
Bahrain (BAX)	1,710.01	0.08	0.08	0.26	0.26	14.78	18 BHD	1.16	11.12
MUSCAT SE INDEX	3,969.54	-0.10	0.33	0.69	0.69	8.49	5 OMR	0.91	13.25
Developed Markets									
MSCI World Index	3,109.47	0.81	0.00	3.42	3.42	15.59			
U.S. (S&P 500)	4,471.37	0.33	1.82	3.80	3.80	19.04			
U.K. (FTSE 100)	7,214.86	-0.26	-0.27	1.81	1.81	11.67			
Japan (Topix)	2,019.23	-0.23	-0.23	-0.54	-0.54	11.89			
Emerging Markets									
MSCI EM Index	1,283.67	1.34	0.00	2.44	2.44	-0.59			
China (SSE Composite)	3,568.14	-0.12	-0.12	0.00	0.00	2.74			
India (Sensex)	61,765.59	0.75	0.75	4.46	4.46	29.35			



What Move the GCC markets ,

Oil Prices

Oil prices hit their highest level in years on Monday as demand recovers from the Covid-19 pandemic, boosted by more custom from power generators turning away from expensive gas and coal to fuel oil and diesel, Brent crude oil futures rose 63 cents, or 0.7%, to \$85.49 a barrel.

Kuwait Market

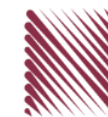
The market closed today up by +0.15%, value traded 62.6 million KD, Premier market value traded reached 29.9 million KD and closed at 7,492.75 up by +0.15% .

Saudi Market

The Market closed down today by -0.13%, with positive macroeconomic sentiments bounce of oil reaching \$85.49

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



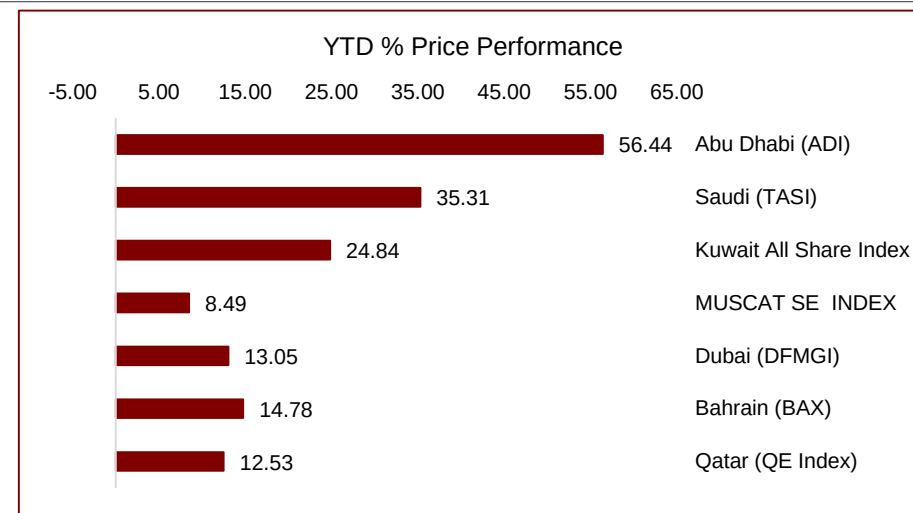
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	0.948	0.00	0.00	-0.63	-0.63	18.38	6.82 KWD	1.80	27.00
KFH	0.817	0.62	1.49	-0.36	-0.36	33.07	6.86 KWD	3.24	32.00
Zain	0.599	0.00	0.00	0.00	0.00	-1.16	2.59 KWD	2.24	13.84
BOUBYAN BANK	0.768	-0.39	-0.13	0.26	0.26	42.34	2.45 KWD	3.54	34.00
Agility	0.971	-0.31	-0.61	-1.52	-1.52	57.84	2.17 KWD	1.75	27.18
Saudi Arabia									
ARAMCO	37.40	0.00	0.27	3.89	3.89	6.86	7,480.00 SAR	7.26	28.07
SABIC	132.40	-1.49	-0.60	4.24	4.24	30.97	403.20 SAR	2.38	35.00
STC	117.60	0.00	0.17	-7.24	-7.24	11.13	235.20 SAR	3.67	21.13
AL-RAJHI BANK	134.80	0.15	0.45	10.11	10.11	83.42	336.50 SAR	5.64	26.42
NCB	65.00	-0.15	0.93	5.86	5.86	49.94	291.52 SAR	1.81	17.67
United Arab Emirates									
ETISALAT.AD	25.12	0.48	1.05	4.58	4.58	48.64	217.42 AED	4.61	23.62
FAB.AD	18.24	1.90	2.01	2.59	2.59	41.40	195.47 AED	1.85	18.17
EMIRATES NBD	13.80	0.36	0.73	-2.82	-2.82	33.98	86.85 AED	1.04	12.46
DB ISLAMIC BK	5.02	0.00	1.21	1.41	1.41	8.89	36.35 AED	0.98	15.21
EMAAR PROPERT	3.96	1.02	1.02	-2.94	-2.94	12.18	28.07 AED	0.50	12.93
Qatar									
QNB	20.00	-0.94	1.31	4.96	4.96	12.73	186.46 QAR	1.86	15.84
INDUSTRIES QAT	15.85	-0.13	0.44	2.65	2.65	45.91	96.00 QAR	2.72	19.10
QA ISLAMIC BK	18.27	-0.16	1.05	0.16	0.16	6.84	43.24 QAR	1.88	14.28
MASRAF AL RAYA	4.65	1.73	0.98	3.26	3.26	2.10	34.28 QAR	2.41	15.34
MESAIEED PETRO	2.44	-1.01	1.24	8.11	8.11	19.20	30.96 QAR	1.92	23.70
OMAN									
BANK MUSCAT	0.478	1.70	2.16	5.33	5.33	31.67	1.68 OMR	0.82	8.33
OMANTEL	0.736	-0.54	-0.54	-0.54	-0.54	1.66	0.55 OMR	1.01	7.69
BANK DHOFAR	0.122	1.67	1.67	4.27	4.27	25.77	0.36 QAR	0.52	14.93
NAT BANK OF OMAN	0.194	-0.51	2.11	4.86	4.86	21.25	0.32 QAR	0.58	12.71
OMINVEST	0.308	-1.91	0.00	-1.27	-1.27	-8.28	0.25 QAR	0.93	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
6-Oct-21	20.89%	10.09%	0.06%	0.37%	0.41%	4.63%	2.56%	10.98%	5.24%	4.18%
13-Oct-21	20.85%	10.13%	0.06%	0.38%	0.40%	4.63%	2.60%	10.96%	5.25%	4.16%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is up today by + 0.15 %The leading sector best performance indices today are Energy 0.75 % Real estate 0.36 % Banking 0.26 % respectively

Telecommunication sector are down today by -0.04 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-24.93 %

KSA

Saudi Armco flat performance today, SABIC have negative performance today by -1.49 %

STC has flat performance today, Al Rajhi Bank has a positive performance today by + 0.15 %

UAE

ETISALAT AD closed up today by + 0.48%, and act defensively with COVID19



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