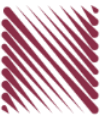


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, November 18, 2021

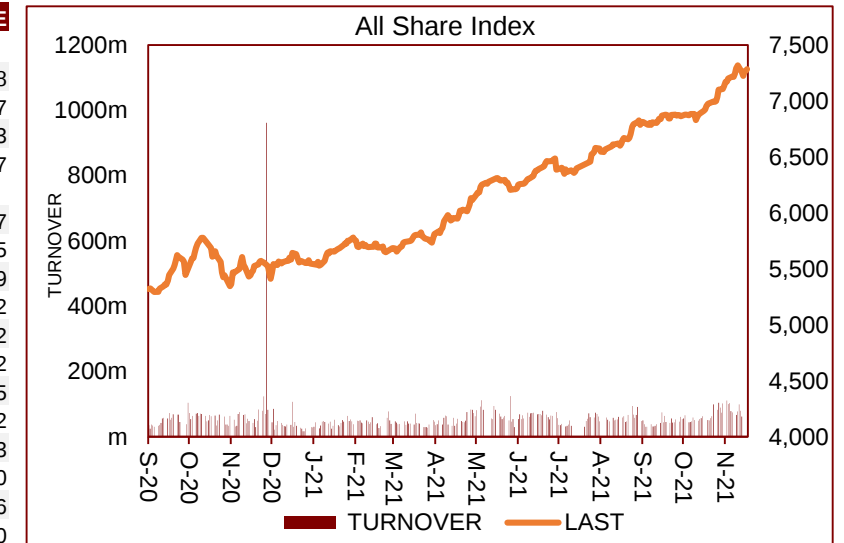




Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,283.41	0.17	-0.47	2.47	6.10	31.33	43.07 KWD	2.13	26.88
Kuwait Premier Index	7,882.86	0.21	-0.66	2.36	5.04	30.13	32.12 KWD	2.29	26.97
Kuwait Main Index	6,126.16	0.04	-0.25	2.46	9.02	34.55	10.95 KWD	1.67	26.73
NIC 50	8,852.99	0.44	-0.71	2.28	4.97	30.13	28.60 KWD	2.27	25.97
Kuwait Sector									
Banking	1,663.45	0.25	-0.55	2.69	5.53	31.76	24.58 KWD	1.26	27.97
Telecom	1,099.78	0.00	-0.89	-0.31	0.38	-0.23	3.37 KWD	0.95	13.65
Industrials	1,235.25	0.23	0.59	2.67	5.84	38.62	4.37 KWD	1.07	12.29
Financial services	1,465.86	-0.37	-0.52	1.92	11.14	57.67	3.80 KWD	0.94	12.42
Real estate	1,416.67	0.56	-0.64	3.47	10.73	48.71	3.04 KWD	0.81	59.62
Basic materials	1,097.45	-0.15	-0.38	-0.19	0.81	22.13	0.98 KWD	1.83	29.42
Health care	791.93	-0.87	-0.36	-0.37	-0.50	-4.20	0.40 KWD	4.58	12.15
Consumer services	759.16	-0.23	-1.13	-2.17	-3.11	1.72	0.70 KWD	1.03	18.62
Insurance	1,636.53	-0.05	3.15	10.77	12.86	41.55	0.68 KWD	0.86	9.83
Consumer Disc	1,369.19	0.61	-1.18	8.33	22.56	67.26	0.23 KWD	1.39	9.30
Energy	1,456.66	0.70	-6.58	-0.15	5.80	14.04	0.30 KWD	1.10	16.46
Technology	771.15	0.00	-1.85	0.00	7.94	53.40	0.01 KWD	0.90	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)	11,710.45	-1.04	-1.48	0.16	1.97	34.90	10,382 SAR	2.54	18.95
Qatar (QE Index)	11,949.75	-0.08	-0.53	1.81	4.28	14.77	607 QAR	1.73	16.43
Dubai (DFMGI)	3,265.14	0.11	3.95	14.00	14.75	31.03	353 AED	1.60	24.95
Abu Dhabi (ADI)	8,349.25	0.14	0.77	6.16	8.45	65.49	1,409 AED	1.85	22.96
Bahrain (BAX)	1,791.09	0.24	0.09	2.76	5.01	20.22	18 BHD	1.54	10.03
MUSCAT SE INDEX	4,063.87	0.34	1.30	-0.27	3.08	11.07	5 OMR	0.87	13.25
Developed Markets									
MSCI World Index	3,226.37	0.17	-0.09	1.46	7.13	19.74			
U.S. (S&P 500)	4,704.54	0.34	0.12	1.81	8.85	24.83			
U.K. (FTSE 100)	7,255.96	-0.48	-0.98	0.53	2.67	12.62			
Japan (Topix)	2,035.52	-0.14	-0.25	1.72	0.26	12.79			
Emerging Markets									
MSCI EM Index	1,273.87	-1.01	0.11	1.75	2.70	-0.34			
China (SSE Composite)	3,520.71	-0.47	-0.52	-0.75	-1.33	1.37			
India (Sensex)	59,636.01	-0.62	-1.86	0.42	0.73	24.72			



What Move the GCC markets ,

Oil Prices

U.S. oil was under pressure on Thursday, adding to an overnight plunge on a Reuters report that the United States was asking major oil consumers like China and Japan to consider a coordinated release of oil reserves to lower prices, U.S. crude was down 62 cents or 0.8% at \$77.74 a barrel.

Kuwait Market

The market closed today up by + 0.17%, value traded 60.1 million KD, Premier market value traded reached 27.8 million KD and closed at 7,882.86 up by + 0.21%.

Saudi Market

The Market closed down by - 1.04%, with positive macroeconomic sentiments bounce of oil reaching \$77.74 or - 0.8%.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



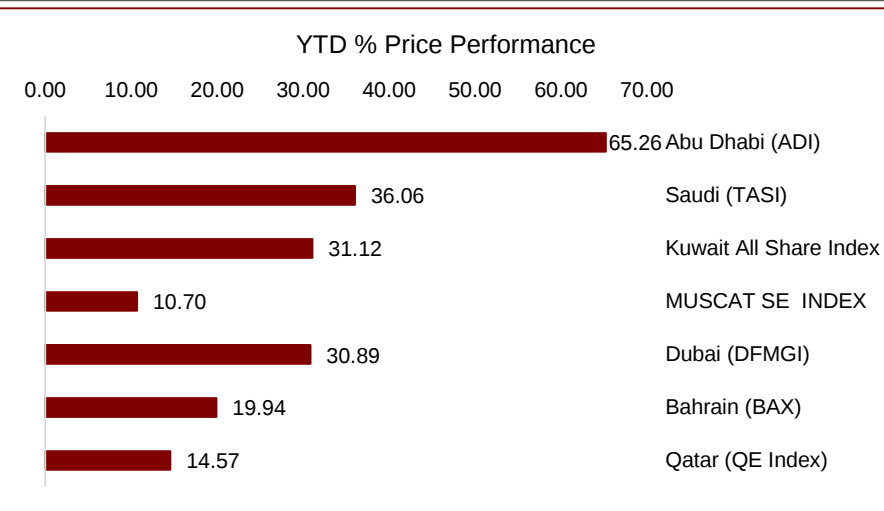
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.036	-0.19	-1.43	4.55	8.60	29.38	7.47 KWD	1.92	27.00
KFH	0.846	0.36	-0.35	0.96	2.68	37.13	7.12 KWD	3.27	32.00
Zain	0.596	0.00	-1.16	-0.50	-0.50	-1.65	2.58 KWD	2.17	13.65
BOUBYAN BANK	0.818	0.25	-0.73	4.08	6.38	51.03	2.60 KWD	3.70	34.00
Agility	1.043	0.00	2.15	5.57	5.89	69.72	2.33 KWD	1.07	2.22
Saudi Arabia									
ARAMCO	36.80	-0.67	-2.40	-3.30	1.81	4.71	7,410.20 SAR	6.93	22.47
SABIC	125.20	-1.73	-2.34	-1.10	-1.57	23.67	382.21 SAR	2.20	35.00
STC	115.20	-0.69	-0.17	-0.17	-9.45	8.49	232.01 SAR	3.38	20.54
AL-RAJHI BANK	144.80	-1.76	-2.28	4.75	18.76	97.83	368.51 SAR	5.79	26.70
NCB	68.90	-1.01	-1.43	5.83	12.38	59.17	311.68 SAR	1.93	19.84
United Arab Emirates									
ETISALAT.AD	27.98	-0.07	0.65	9.30	16.49	65.56	243.51 AED	5.29	26.38
FAB.AD	19.70	0.00	3.03	10.67	10.80	52.71	215.12 AED	1.97	17.70
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	0.00	2.78	8.41	11.92	20.17	40.11 AED	1.05	14.77
EMAAR PROPERT	5.12	0.79	6.00	26.73	25.49	45.04	36.37 AED	0.64	13.18
Qatar									
QNB	21.00	0.00	-0.24	2.94	9.66	17.78	194.86 QAR	1.94	16.47
INDUSTRIES QAT	15.76	-0.57	-0.38	-1.91	2.85	46.18	96.34 QAR	2.56	14.39
QA ISLAMIC BK	18.15	-0.82	0.00	0.55	0.27	6.96	43.44 QAR	1.81	13.65
MASRAF AL RAYA	4.89	0.58	-1.33	4.11	9.24	8.01	36.63 QAR	2.46	16.38
MESAIEED PETRO	2.31	0.00	-1.62	5.09	2.44	12.95	29.18 QAR	1.74	17.72
OMAN									
BANK MUSCAT	0.498	1.63	2.47	2.47	10.67	38.33	1.75 OMR	0.83	8.33
OMANTEL	0.740	-0.54	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	0.189	-1.56	-2.58	-2.58	2.16	18.13	0.31 QAR	0.57	12.71
OMINVEST	0.314	1.29	-0.63	1.29	0.00	-7.10	0.25 QAR	0.92	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, Borsa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is up today by + 0.17 % The leading sector best performance indices today are Consumer Disc 0.61 % Real estate 0.56 % Banking 0.25 % respectively

Telecommunication sector are flat today 0 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -31.56 %

KSA

Saudi Armco has a negative performance today by -0.67 %, SABIC has a negative performance today by -1.73 %

STC has a negative performance today by -0.69 %, Al Rajhi Bank has a negative performance today by -0.95 %

UAE

ETISALAT AD closed down today by – 0.07 %, and act defensively with COVID19



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