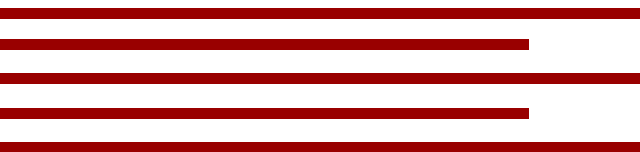


شركة الاستثمارات الوطنية
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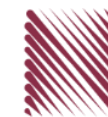


GCC DAILY MORNING BRIEF

Wednesday, August 18, 2021

DAILY MARKETS WRAP,

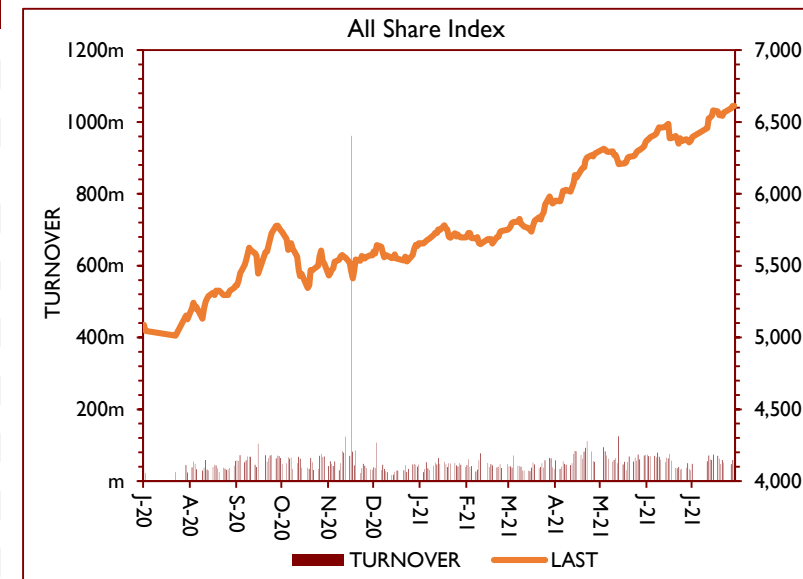
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Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,651.39	0.52	0.46	0.94	4.01	19.78	38.94 KWD	2.48	28.38
Kuwait Premier Index	7,274.54	0.74	0.75	1.36	4.70	20.01	29.30 KWD	2.25	27.73
Kuwait Main Index	5,417.73	-0.17	-0.43	-0.34	1.92	19.03	9.64 KWD	3.19	30.46
NIC 50	8,084.03	0.61	0.70	1.28	4.63	20.01	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,525.30	0.80	1.21	1.65	5.34	20.82	22.31 KWD	1.32	28.73
Telecom	1,086.04	0.24	0.20	-0.36	0.52	-1.48	3.32 KWD	0.73	13.68
Industrials	1,159.09	0.25	-0.40	-0.05	2.39	30.07	4.11 KWD	0.82	11.77
Financial services	1,234.92	-0.23	-1.07	1.49	6.77	32.83	3.08 KWD	0.77	8.01
Real estate	1,218.21	0.35	-0.69	0.74	2.81	27.88	2.61 KWD	0.69	33.07
Basic materials	1,074.74	0.47	1.88	-0.22	-1.89	19.60	0.95 KWD	1.90	11.57
Health care	807.12	-0.74	0.00	0.79	2.15	-2.36	0.40 KWD	3.72	31.58
Consumer services	747.14	0.79	-0.14	-3.15	-4.72	0.10	0.53 KWD	0.92	6.81
Insurance	1,449.93	0.16	2.68	3.21	4.65	25.41	0.61 KWD	0.85	9.33
Consumer Disc	1,016.55	-0.22	-0.92	-1.82	4.32	24.18	0.23 KWD	1.31	9.23
Energy	1,379.73	0.60	-1.06	-2.57	-3.54	8.02	0.29 KWD	0.99	14.66
Technology	763.88	4.48	4.90	0.96	-7.08	51.96	0.01 KWD	0.86	0.00
Utilities	592.11	0.00	-0.44	-0.88	-1.31	-18.77	0.25 KWD	4.73	19.55

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,344.94	-0.42	0.30	3.13	3.40	30.56	9,872 SAR	2.82	20.33
Qatar (QE Index)	10,996.13	0.12	0.60	2.16	2.38	5.37	564 QAR	1.54	15.86
Dubai (DFMGI)	2,862.01	0.87	1.68	3.48	1.83	14.85	310 AED	1.49	19.07
Abu Dhabi (ADI)	7,694.59	-0.46	1.32	5.14	12.57	52.34	1,365 AED	1.73	24.32
Bahrain (BAX)	1,638.10	0.09	0.43	2.57	3.16	9.96	17 BHD	1.17	11.23
MUSCAT SE INDEX	3,990.84	-0.29	-0.28	-0.98	-1.79	9.08	5 OMR	0.92	13.25
Developed Markets									
MSCI World Index	3,078.01	-0.71	-0.80	1.01	2.75	15.24			
U.S. (S&P 500)	4,400.27	-1.07	-0.45	1.20	3.50	18.42			
U.K. (FTSE 100)	7,169.32	-0.16	-0.73	1.90	1.82	10.92			
Japan (Topix)	1,923.97	0.44	-1.66	1.20	-1.01	6.61			
Emerging Markets									
MSCI EM Index	1,261.60	0.46	-1.96	-1.72	-8.65	-2.75			
China (SSE Composite)	3,485.29	1.11	-0.88	2.59	-2.95	0.35			
India (Sensex)	55,629.49	-0.29	0.25	5.68	5.89	16.38			



What Move the GCC markets ,

Oil Prices

Oil prices dipped on Wednesday, a fifth day of declines with investors wary about prospects for stronger fuel demand as the use of rail, air and other forms of transport remained constrained amid surging Covid-19 cases worldwide, Brent crude was down 5 cents or 0.1% at \$68.98 a barrel

Kuwait Market

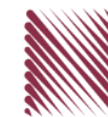
The market closed up by 0.52%, value traded 58.7 million KD, Premier market value traded reached 34.2 million KD and closed at 7,274 change by 0.74%.

Saudi Market

The Market closed down today by - 0.42%, with positive macroeconomic sentiments bounce of oil -0.1% recouping some of the losses in the previous session when prices hit a three-week low.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



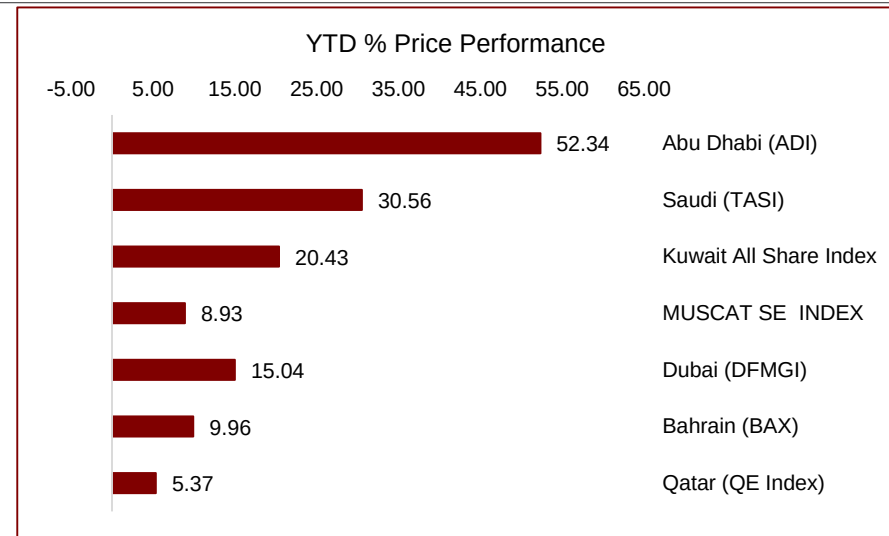
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.900	0.67	0.79	0.45	5.77	12.25	6.43 KWD	1.70	27.00
KFH	0.799	1.14	1.27	1.53	5.01	29.50	6.67 KWD	3.15	32.00
Zain	0.593	0.17	0.34	0.34	0.68	-2.15	2.56 KWD	2.21	13.68
BOUBYAN BANK	0.787	0.51	-0.38	-1.75	7.38	45.30	2.49 KWD	3.60	34.00
Agility	1.002	0.70	-0.60	1.42	8.93	62.72	2.22 KWD	1.79	27.77
Saudi Arabia									
ARAMCO	35.05	-0.57	0.00	1.00	0.28	0.57	7,050.00 SAR	6.84	26.34
SABIC	123.80	-0.96	1.79	3.31	2.63	23.27	375.00 SAR	2.21	35.00
STC	135.00	-2.17	-0.15	1.49	3.34	28.30	276.00 SAR	4.31	24.32
AL-RAJHI BANK	122.40	0.33	0.99	10.09	10.09	66.03	305.00 SAR	5.11	23.74
NCB	60.00	-0.66	0.00	9.09	4.17	38.41	270.47 SAR	1.70	16.54
United Arab Emirates									
ETISALAT.AD	24.76	-2.52	2.74	8.60	12.55	46.51	220.90 AED	4.69	24.00
FAB.AD	17.04	-0.35	2.04	2.77	2.04	32.09	186.73 AED	1.76	17.36
EMIRATES NBD	13.85	1.09	3.36	3.36	4.53	34.47	86.54 AED	1.04	12.41
DB ISLAMIC BK	5.03	0.00	0.20	4.14	4.36	9.11	36.42 AED	0.98	15.24
EMAAR PROPERT	4.12	1.73	1.98	3.52	-0.96	16.71	29.00 AED	0.52	13.36
Qatar									
QNB	19.40	1.04	1.63	6.32	7.80	8.53	178.30 QAR	1.84	15.58
INDUSTRIES QAT	13.30	0.00	-0.45	-0.60	0.15	22.08	80.90 QAR	2.28	16.00
QA ISLAMIC BK	17.41	0.00	0.69	1.05	0.64	1.69	41.36 QAR	1.79	13.58
MASRAF AL RAYA	4.40	0.00	0.09	1.81	-1.37	-2.91	33.18 QAR	2.32	14.77
MESAIEED PETRO	1.99	0.10	0.81	3.82	5.47	-3.03	25.07 QAR	1.54	19.09
OMAN									
BANK MUSCAT	0.440	-1.35	0.00	-1.34	4.25	22.78	1.59 OMR	0.78	8.33
OMANTEL	0.776	0.00	0.00	-2.02	-2.51	7.18	0.58 OMR	1.05	7.69
BANK DHOFAR	0.120	0.00	0.00	-2.44	-4.00	23.71	0.36 QAR	0.52	14.93
NAT BANK OF OMAN	0.187	-0.53	-1.59	0.54	-7.00	16.25	0.31 QAR	0.56	12.71
OMINVEST	0.314	-0.63	-0.63	0.00	0.64	-7.10	0.26 QAR	0.94	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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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is up today by + 0.52 %The leading sector best performance indices today are Banking 0.8 % Consumer services 0.79 % Energy 0.6 % 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 up today by + 0.24 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-21.26 %

KSA

Saudi Armco have negative performance today by - 0.57 %, SABIC has negative performance today - 0.96 %

STC have negative performance today by - 2.17 %, Al Rajhi Bank has a positive performance today by + 0.33 %

UAE

ETISALAT AD closed down today by - 2.52%, and act defensively with COVID19



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