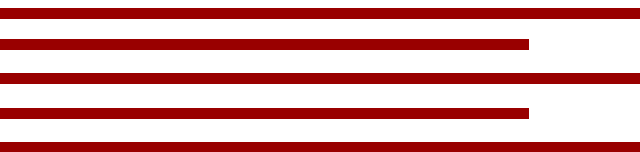


شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY

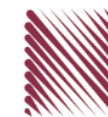


## GCC DAILY MORNING BRIEF

Wednesday, May 19, 2021

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP

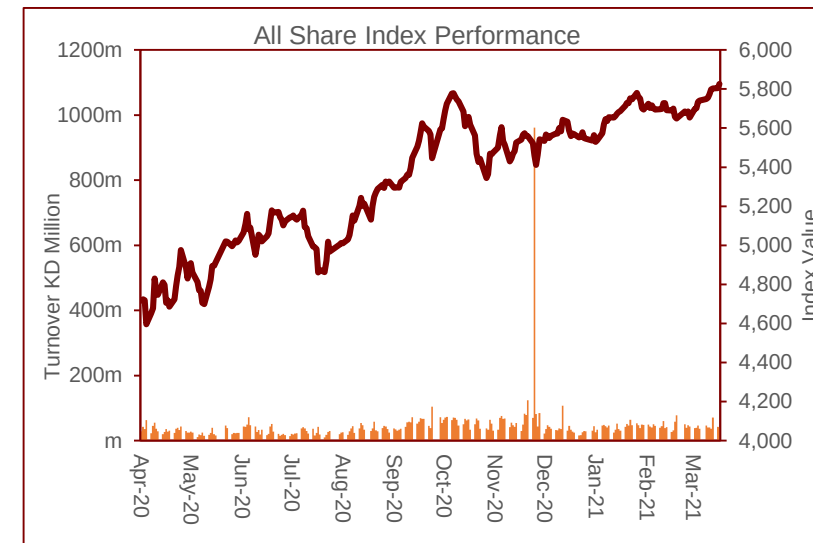


### Market Watch

| Description            | Close    | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|------------------------|----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>Kuwait</b>          |          | %     | %     | %     | %     | %     |               |      |       |
| Kuwait All Share Index | 6,295.11 | -0.22 | 0.28  | 2.99  | 9.01  | 13.53 | 37.01 KWD     | 2.07 | 38.00 |
| Kuwait Premier Index   | 6,829.07 | -0.02 | 0.57  | 3.11  | 7.98  | 12.86 | 27.65 KWD     | 2.21 | 34.75 |
| Kuwait Main Index      | 5,257.98 | -0.81 | -0.68 | 2.54  | 12.18 | 15.50 | 9.36 KWD      | 1.64 | 47.89 |
| NIC 50                 | 7,632.45 | -0.17 | 0.52  | 3.03  | 7.91  | 12.86 | 28.60 KWD     | 1.57 | 15.56 |
| <b>Kuwait Sector</b>   |          |       |       |       |       |       |               |      |       |
| Banking                | 1,395.84 | 0.04  | 0.82  | 2.45  | 6.21  | 10.57 | 20.53 KWD     | 1.39 | 35.75 |
| Telecom                | 1,100.01 | 0.06  | -0.68 | -0.58 | -1.32 | -0.21 | 3.36 KWD      | 0.61 | 14.26 |
| Industrials            | 1,153.00 | -0.75 | -1.32 | 8.30  | 25.21 | 29.39 | 4.14 KWD      | 0.88 | 12.05 |
| Financial services     | 1,163.97 | -1.15 | 0.60  | 3.68  | 18.18 | 25.20 | 2.99 KWD      | 0.81 | 9.49  |
| Real estate            | 1,197.42 | 0.25  | -0.35 | 4.18  | 17.77 | 25.70 | 2.57 KWD      | 0.73 | 51.25 |
| Basic materials        | 1,167.89 | -0.50 | -0.41 | -0.85 | 7.24  | 29.97 | 1.05 KWD      | 1.75 | 10.14 |
| Health care            | 793.94   | 0.02  | 0.03  | 0.08  | -2.01 | -3.96 | 0.39 KWD      | 4.53 | 40.51 |
| Consumer services      | 813.92   | -1.04 | 1.04  | 10.06 | 15.00 | 9.05  | 0.51 KWD      | 0.92 | 11.78 |
| Insurance              | 1,308.19 | -1.39 | 1.77  | 3.51  | 8.92  | 13.15 | 0.50 KWD      | 0.83 | 8.32  |
| Consumer Disc          | 979.18   | -1.48 | -0.84 | 8.41  | 15.80 | 19.62 | 0.25 KWD      | 1.40 | 9.29  |
| Energy                 | 1,337.99 | -1.77 | -2.49 | 2.36  | 9.20  | 4.75  | 0.28 KWD      | 0.98 | 14.30 |
| Technology             | 710.04   | -6.15 | -4.31 | -8.79 | 19.02 | 41.25 | 0.01 KWD      | 0.86 | 0.00  |
| Utilities              | 663.16   | 0.00  | -0.79 | -1.18 | -5.97 | -9.03 | 0.28 KWD      | 3.99 | 22.70 |

| Description              | Close     | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|--------------------------|-----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>GCC Markets</b>       |           | %     | %     | %     | %     | %     |               |      |       |
| Saudi (TASI)             | 10,372.54 | -0.49 | 0.62  | -0.31 | 4.83  | 19.53 | 9,675 SAR     | 2.55 | 21.23 |
| Qatar (QE Index)         | 10,733.62 | -0.70 | -1.75 | -1.63 | 3.19  | 2.85  | 546 QAR       | 1.69 | 20.15 |
| Dubai (DFMGI)            | 2,711.21  | 0.24  | 0.56  | 4.06  | 6.31  | 8.80  | 297 AED       | 1.50 | 28.48 |
| Abu Dhabi (ADI)          | 6,518.61  | -0.15 | 4.98  | 7.80  | 10.25 | 29.20 | 935 AED       | 1.75 | 12.40 |
| Bahrain (BAX)            | 1,531.21  | -0.32 | 0.16  | 3.12  | 5.02  | 2.78  | 16 BHD        | 1.23 | 17.44 |
| MUSCAT SE INDEX          | 3,847.76  | 0.01  | 0.33  | 2.31  | 3.75  | 5.17  | 5 OMR         | 0.84 | 13.25 |
| <b>Developed Markets</b> |           |       |       |       |       |       |               |      |       |
| MSCI World Index         | 2,910.94  | -0.61 | -0.34 | -0.34 | 4.16  | 8.87  |               |      |       |
| U.S. (S&P 500)           | 4,115.68  | -0.29 | -1.10 | -1.28 | 3.90  | 9.90  |               |      |       |
| U.K. (FTSE 100)          | 6,950.20  | -1.19 | -1.41 | -0.36 | 3.44  | 7.49  |               |      |       |
| Japan (Topix)            | 1,895.24  | -0.66 | 0.63  | -0.16 | -3.01 | 5.02  |               |      |       |
| <b>Emerging Markets</b>  |           |       |       |       |       |       |               |      |       |
| MSCI EM Index            | 1,333.18  | 1.66  | 1.96  | -1.07 | 1.27  | 3.25  |               |      |       |
| China (SSE Composite)    | 3,510.96  | -0.51 | 0.59  | 1.86  | 2.01  | 1.09  |               |      |       |
| India (Sensex)           | 49,902.64 | -0.58 | 2.40  | 2.30  | 0.79  | 4.51  |               |      |       |

Sources, Bursa Kuwait , Refinitiv , NIC.



### What Move the GCC markets ,

#### Oil Prices

Oil prices fell for a second day on Wednesday on the potential of Iranian supply returning and as investors sold on speculation that inflation fears might lead the U.S. Federal Reserve to raise interest rates, which could limit economic growth. Brent crude futures dipped \$1.10, or 1.6%, to \$67.61 per barrel.

#### Kuwait Market

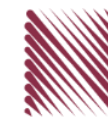
The market closed today down by 0.22%, value traded 71.0 million KD, Premier market value traded reached 39.4 million KD and closed at 6,829 change by 0.02%.

#### Saudi Market

The Market closed down by 0.49%, today market Performance is linked to oil prices raised to \$67.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



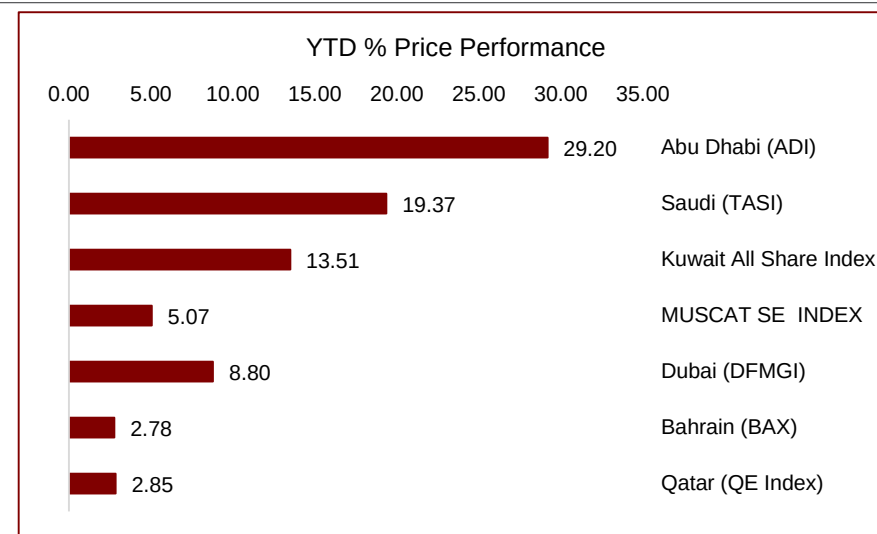
| Description                 | Close  | Day Δ | WTD   | MTD   | QTD   | YTD    | M Cap (in Bn) | PBV  | PE    |
|-----------------------------|--------|-------|-------|-------|-------|--------|---------------|------|-------|
| <b>Blue Chip Watch</b>      |        | %     | %     | %     | %     | %      |               |      |       |
| <b>Kuwait</b>               |        |       |       |       |       |        |               |      |       |
| NBK                         | 0.836  | -0.36 | 0.36  | 1.46  | 3.47  | 4.38   | 6.02 KWD      | 1.56 | 27.00 |
| KFH                         | 0.747  | 0.95  | 2.47  | 3.32  | 6.99  | 21.37  | 6.23 KWD      | 3.32 | 32.00 |
| Zain                        | 0.600  | 0.00  | -0.33 | -0.50 | -0.83 | -0.99  | 2.59 KWD      | 2.32 | 14.26 |
| BOUBAYAN BANK               | 0.670  | 0.90  | 0.91  | 1.68  | 15.59 | 23.12  | 2.11 KWD      | 3.47 | 34.00 |
| Agility                     | 1.045  | -0.48 | -1.04 | 10.55 | 44.35 | 55.03  | 2.12 KWD      | 1.74 | 47.38 |
| <b>Saudi Arabia</b>         |        |       |       |       |       |        |               |      |       |
| ARAMCO                      | 35.45  | -0.28 | -0.98 | 0.14  | -1.53 | 1.29   | 7,110.00 SAR  | 7.03 | 35.52 |
| SABIC                       | 123.20 | -0.48 | 0.98  | 0.00  | 5.62  | 22.29  | 371.40 SAR    | 2.17 | 35.00 |
| STC                         | 120.60 | -0.33 | -0.82 | -5.20 | -5.05 | 13.58  | 242.00 SAR    | 3.71 | 21.97 |
| AL-RAJHI BANK               | 102.00 | -0.97 | 2.71  | 3.54  | 3.64  | 39.13  | 257.50 SAR    | 4.35 | 21.99 |
| NCB                         | 54.20  | -0.55 | 0.56  | -4.40 | 2.26  | 25.26  | 244.05 SAR    | 1.96 | 14.00 |
| <b>United Arab Emirates</b> |        |       |       |       |       |        |               |      |       |
| ETISALAT.AD                 | 21.96  | -0.81 | 1.86  | 3.68  | 1.48  | 29.94  | 192.55 AED    | 4.31 | 20.93 |
| FAB.AD                      | 16.60  | 0.73  | 13.85 | 16.57 | 13.70 | 28.68  | 179.96 AED    | 1.75 | 17.51 |
| EMIRATES NBD                | 12.65  | -0.78 | 0.40  | 1.61  | 10.00 | 22.82  | 80.54 AED     | 0.97 | 12.31 |
| DB ISLAMIC BK               | 4.59   | 0.22  | 0.88  | 3.15  | 0.88  | -0.43  | 33.16 AED     | 0.92 | 13.39 |
| EMAAR PROPERT               | 3.98   | 1.79  | -0.50 | 6.70  | 12.43 | 12.75  | 27.99 AED     | 0.50 | 11.36 |
| <b>Qatar</b>                |        |       |       |       |       |        |               |      |       |
| QNB                         | 17.72  | -1.01 | -1.56 | -1.01 | -1.50 | -0.62  | 163.82 QAR    | 1.79 | 15.39 |
| INDUSTRIES QAT              | 12.61  | -2.17 | -6.62 | -6.82 | 5.10  | 15.55  | 77.27 QAR     | 2.35 | 24.10 |
| QA ISLAMIC BK               | 17.29  | 0.00  | -0.12 | -0.69 | 4.98  | 0.99   | 40.48 QAR     | 1.85 | 13.98 |
| MASRAF AL RAYA              | 4.48   | 0.34  | 0.02  | 0.16  | 4.31  | -1.21  | 33.14 QAR     | 2.45 | 15.18 |
| MESAIEED PETRO              | 1.90   | -0.47 | -1.35 | -1.71 | 1.99  | -7.33  | 23.73 QAR     | 1.53 | 28.03 |
| <b>OMAN</b>                 |        |       |       |       |       |        |               |      |       |
| BANK MUSCAT                 | 0.392  | -1.01 | -2.00 | 0.51  | 2.08  | 8.89   | 1.42 OMR      | 0.70 | 8.33  |
| OMANTEL                     | 0.788  | -0.51 | -2.96 | 2.07  | 0.00  | 8.84   | 0.59 OMR      | 1.11 | 7.69  |
| BANK DHOFAR                 | 0.115  | 3.60  | 8.49  | 5.50  | 8.49  | 18.56  | 0.33 QAR      | 0.47 | 14.93 |
| NAT BANK OF OMAN            | 0.163  | 0.00  | 5.16  | 3.16  | 8.67  | 1.88   | 0.27 QAR      | 0.49 | 12.71 |
| OMINVEST                    | 0.302  | 0.67  | -2.58 | -2.58 | -5.62 | -10.65 | 0.24 QAR      | 0.93 | 6.85  |

| Foreign Holding |        |        |       |       |         |       |       |        |       |       |
|-----------------|--------|--------|-------|-------|---------|-------|-------|--------|-------|-------|
| Date            | NBK    | GBK    | CBK   | ABK   | MUTAHED | KIB   | BURG  | KFH    | BOUB  | WARBA |
| 5-May-21        | 19.83% | 11.62% | 0.06% | 1.07% | 0.32%   | 4.49% | 2.67% | 10.21% | 5.01% | 4.17% |
| 12-May-21       | 19.83% | 11.65% | 0.06% | 1.07% | 0.31%   | 4.60% | 2.69% | 10.21% | 5.02% | 4.19% |

### End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



### Leading Sector Performance

The market is down today by -0.22 % The leading sector bottom performance indices today are Technology -6.15 % Energy -1.77 % Consumer Disc -1.48 % respectively

from YTD performance perspective the best sector performance is Basic materials by 29.97 % while the bottom sector performance is Utilities by -9.03 %

Telecommunication sector are up today by + 0.06 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -13.74 %

### KSA

Saudi Armco have negative performance today by - 0.28 %, SABIC have negative performance today by - 0.48 %

STC have negative performance today by -0.33 %, Al Rajhi Bank have negative performance today by - 0.97 %

### UAE

ETISALAT AD closed today down by -0. 81% and act defensively with COVID19



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