

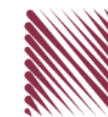


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, September 19, 2021

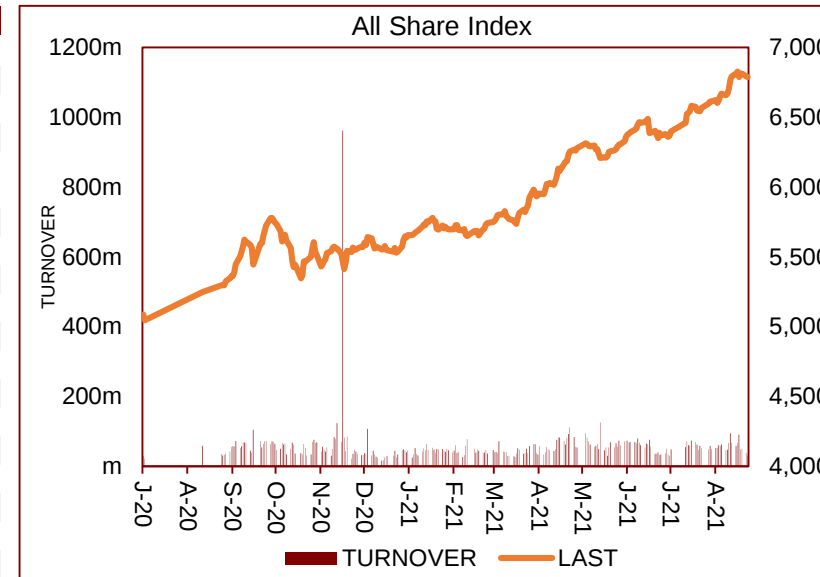




Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,878.66	0.13	1.04	1.38	7.73	24.07	40.45 KWD	2.67	27.18
Kuwait Premier Index	7,509.08	-0.03	0.96	1.10	8.33	24.17	30.49 KWD	2.34	28.60
Kuwait Main Index	5,635.86	0.63	1.32	2.27	5.93	23.72	9.97 KWD	3.69	22.94
NIC 50	8,353.68	0.00	0.91	1.03	8.26	24.17	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,580.56	-0.03	-0.03	1.28	9.16	25.20	23.34 KWD	1.32	29.60
Telecom	1,100.30	-0.04	-0.04	-1.18	1.84	-0.18	3.38 KWD	0.70	13.07
Industrials	1,171.32	0.23	0.23	0.49	3.47	31.45	4.15 KWD	0.89	11.36
Financial services	1,320.17	0.90	0.90	4.77	14.14	42.00	3.25 KWD	0.78	10.94
Real estate	1,282.56	0.27	0.27	3.14	8.24	34.63	2.76 KWD	0.68	28.19
Basic materials	1,065.65	-0.05	-0.05	-1.59	-2.72	18.59	0.95 KWD	1.91	11.62
Health care	798.31	0.00	0.00	0.84	1.03	-3.43	0.40 KWD	4.50	13.54
Consumer services	759.16	-0.14	-0.14	2.59	-3.19	1.72	0.57 KWD	1.09	10.09
Insurance	1,462.94	1.10	1.10	0.24	5.59	26.53	0.60 KWD	0.81	9.74
Consumer Disc	1,121.60	0.94	0.94	2.91	15.10	37.01	0.23 KWD	1.35	9.46
Energy	1,371.48	0.59	0.59	0.69	-4.12	7.37	0.28 KWD	0.99	14.46
Technology	720.23	0.00	0.00	-1.20	-12.39	43.27	0.01 KWD	0.84	0.00
Utilities	618.42	0.00	-0.42	0.86	3.07	-15.16	0.26 KWD	4.94	20.42

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,397.84	-0.21	-0.33	0.58	3.65	31.02	9,855 SAR	2.80	20.36
Qatar (QE Index)	11,224.09	0.39	1.00	1.07	4.48	7.43	569 QAR	1.70	16.22
Dubai (DFMGI)	2,905.90	0.17	-0.06	0.10	3.39	16.61	319 AED	1.59	19.72
Abu Dhabi (ADI)	7,808.09	-0.95	-0.67	1.61	14.23	54.76	1,089 AED	1.78	25.20
Bahrain (BAX)	1,686.65	0.44	1.01	2.51	6.21	13.21	17 BHD	1.16	11.02
MUSCAT SE INDEX	3,942.16	0.18	-0.46	-0.62	-2.98	7.75	5 OMR	0.90	13.25
Developed Markets									
MSCI World Index	3,096.61	-0.83	-0.82	-1.42	2.63	15.11			
U.S. (S&P 500)	4,432.99	0.33	-0.57	-1.98	3.15	18.02			
U.K. (FTSE 100)	6,963.64	-0.91	-0.93	-2.19	-1.05	7.79			
Japan (Topix)	2,100.17	0.48	0.41	7.11	8.06	16.37			
Emerging Markets									
MSCI EM Index	1,279.35	0.20	-2.26	-2.24	-6.93	-0.92			
China (SSE Composite)	3,613.97	0.19	-2.41	1.98	0.63	4.06			
India (Sensex)	59,015.89	-0.21	1.22	2.54	12.45	23.59			



What Move the GCC markets ,

Oil Prices

Oil prices fell on Friday as energy companies in the U.S. Gulf of Mexico restarted production after back-to-back hurricanes in the region shut output, Brent crude futures fell 33 cents to settle at \$75.34 a barrel.

Kuwait Market

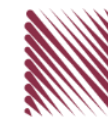
The market closed up today by + 0.13%, value traded 44.7 million KD, Premier market value traded reached 22.9 million KD and closed at 7,509 change by - 0.03%.

Saudi Market

The Market closed down today by - 0.21%, with positive macroeconomic sentiments bounce of oil reaching \$75.34.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



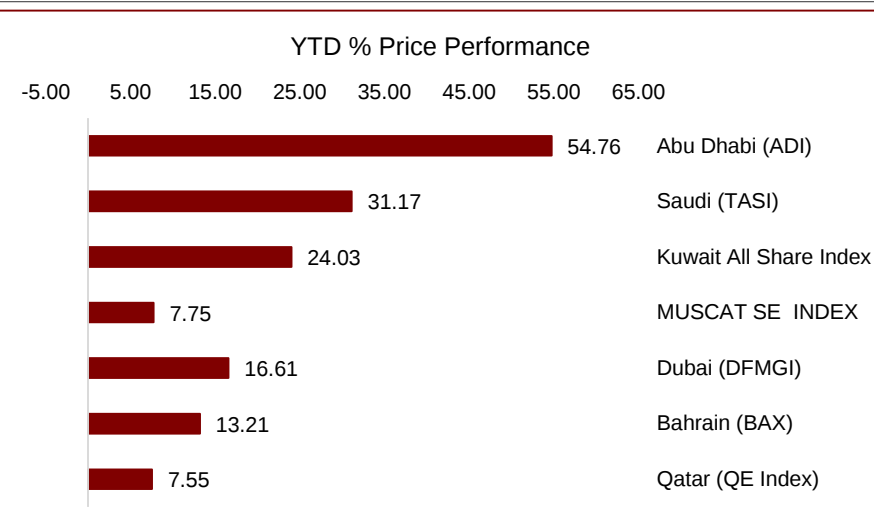
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.959	-0.10	0.00	2.56	13.07	20.00	6.91 KWD	1.83	27.00
KFH	0.827	-0.36	-0.24	0.24	9.09	34.53	7.01 KWD	3.31	32.00
Zain	0.601	0.00	0.00	-1.64	2.04	-0.83	2.60 KWD	2.25	13.88
BOUBYAN BANK	0.776	-0.64	-0.64	-0.89	6.01	43.45	2.48 KWD	3.59	34.00
Agility	0.990	0.10	-0.20	-0.90	7.84	61.09	2.21 KWD	1.78	27.60
Saudi Arabia									
ARAMCO	35.00	-0.43	0.00	-0.57	-0.43	-0.14	7,029.25 SAR	6.82	26.45
SABIC	125.00	0.97	0.65	1.30	2.30	22.88	371.36 SAR	2.19	35.00
STC	131.60	-0.75	-2.66	-2.37	0.15	24.34	265.17 SAR	4.14	24.07
AL-RAJHI BANK	122.20	-0.97	-1.29	0.99	10.09	66.03	308.47 SAR	5.17	24.02
NCB	60.90	-0.98	-0.65	0.16	5.73	40.48	275.40 SAR	1.71	16.87
United Arab Emirates									
ETISALAT.AD	24.54	-1.45	-0.57	3.98	11.55	45.21	216.55 AED	4.59	23.52
FAB.AD	18.24	-2.46	-0.33	7.29	9.22	41.40	204.20 AED	1.93	18.98
EMIRATES NBD	14.35	0.70	2.50	3.61	8.30	39.32	90.01 AED	1.08	12.91
DB ISLAMIC BK	5.03	0.20	-0.98	-1.37	4.36	9.11	36.35 AED	0.98	15.21
EMAAR PROPERT	4.20	0.00	0.24	0.00	0.96	18.98	30.07 AED	0.54	13.85
Qatar									
QNB	19.15	-0.78	0.52	0.00	6.80	7.52	178.26 QAR	1.85	15.66
INDUSTRIES QAT	13.63	1.19	4.20	6.23	3.02	25.58	81.49 QAR	2.31	16.21
QA ISLAMIC BK	18.21	0.11	-0.38	-0.38	5.44	6.55	42.98 QAR	1.87	14.19
MASRAF AL RAYA	4.47	0.54	-0.36	-1.78	0.22	-1.35	33.32 QAR	2.34	14.91
MESAEED PETRO	2.39	8.87	12.70	11.85	18.86	9.28	27.63 QAR	1.71	21.14
OMAN									
BANK MUSCAT	0.442	0.46	0.00	0.45	4.25	22.78	1.57 OMR	0.77	8.33
OMANTEL	0.752	0.00	0.53	0.00	-5.03	4.42	0.56 OMR	1.02	7.69
BANK DHOFAR	0.118	0.00	0.00	0.00	-5.60	21.65	0.35 QAR	0.51	14.93
NAT BANK OF OMAN	0.188	-1.05	-1.05	0.53	-5.50	18.13	0.31 QAR	0.57	12.71
OMINVEST	0.312	0.00	-0.64	-1.89	0.00	-7.69	0.25 QAR	0.93	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
8-Sep-21	20.66%	10.81%	0.06%	0.35%	0.35%	4.68%	2.71%	10.89%	5.22%	4.17%
15-Sep-21	20.77%	10.56%	0.06%	0.35%	0.36%	4.68%	2.72%	10.92%	5.22%	4.19%

End of Report

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed and others authorized to receive it.

Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is up today by + 0.13 %The leading sector best performance indices today are Consumer Disc 0.94 % Financial services 0.9 % Energy 0.59 % 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 down today by -0.04 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -24.25 %

KSA

Saudi Armco have negative performance today by -0.43 %, SABIC have positive performance today by + 0.97 %

STC have negative performance today by -0.75 %, Al Rajhi Bank have negative performance today by -0.97 %

UAE

ETISALAT AD closed down today by - 1.45%, and act defensively with COVID19



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw