

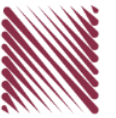


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MORNING BRIEF

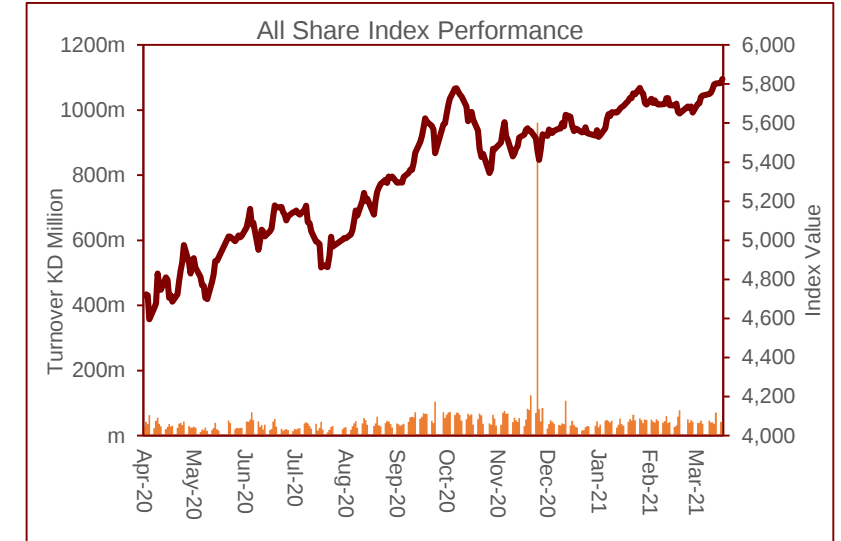
Sunday, May 2, 2021



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	6,163.64	0.82	2.23	6.71	6.71	11.14	35.94 KWD	1.97	38.48
Kuwait Premier Index	6,670.78	0.72	1.22	5.48	5.48	10.24	26.90 KWD	2.12	34.77
Kuwait Main Index	5,184.94	1.12	5.41	10.62	10.62	13.89	9.04 KWD	1.48	49.83
NIC 50	7,476.16	0.75	1.17	5.40	5.41	10.24	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,372.30	0.72	0.72	0.72	4.42	8.70	20.13 KWD	1.39	35.77
Telecom	1,112.44	0.54	0.54	0.54	-0.20	0.92	3.39 KWD	0.60	14.09
Industrials	1,080.94	1.53	1.53	1.53	17.38	21.30	3.81 KWD	0.76	12.97
Financial services	1,137.39	1.31	1.31	1.31	15.48	22.34	2.84 KWD	0.77	6.95
Real estate	1,152.96	0.31	0.31	0.31	13.39	21.03	2.48 KWD	0.69	60.75
Basic materials	1,181.78	0.33	0.33	0.33	8.51	31.51	1.05 KWD	1.83	23.83
Health care	793.32	0.00	0.00	0.00	-2.09	-4.03	0.39 KWD	4.43	40.51
Consumer services	746.16	0.89	0.89	0.89	5.43	-0.03	0.47 KWD	0.94	10.68
Insurance	1,265.95	0.17	0.17	0.17	5.40	9.50	0.47 KWD	0.88	8.52
Consumer Disc	932.83	3.28	3.28	3.28	10.32	13.95	0.23 KWD	1.30	28.36
Energy	1,324.30	1.31	1.31	1.31	8.08	3.68	0.27 KWD	0.85	14.29
Technology	763.88	-1.87	-1.87	-1.87	28.05	51.96	0.01 KWD	0.89	0.00
Utilities	673.68	0.00	0.39	0.39	-4.48	-7.58	0.28 KWD	6.92	22.87

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	10,365.51	-0.51	-0.51	-0.51	4.62	19.29	9,653 SAR	2.49	22.02
Qatar (QE Index)	10,906.17	-0.05	0.53	4.82	4.82	4.47	555 QAR	1.64	20.35
Dubai (DFMGI)	2,624.07	0.72	-0.06	2.90	2.90	5.30	288 AED	1.31	31.30
Abu Dhabi (ADI)	6,076.84	0.50	-0.41	2.78	2.78	20.45	877 AED	1.68	18.48
Bahrain (BAX)	1,484.85	-0.09	-0.10	1.84	1.84	-0.33	15 BHD	1.32	11.23
MUSCAT SE INDEX	3,788.28	0.73	1.86	2.15	2.15	3.54	5 OMR	0.82	13.25
Developed Markets									
MSCI World Index	2,938.76	-0.83	-0.25	4.52	4.52	9.25			
U.S. (S&P 500)	4,181.17	0.33	0.02	5.24	5.24	11.32			
U.K. (FTSE 100)	6,969.81	0.12	0.45	3.82	3.82	7.88			
Japan (Topix)	1,898.24	-0.57	-0.87	-2.85	-2.85	5.18			
Emerging Markets									
MSCI EM Index	1,347.61	-1.24	-0.40	2.37	2.37	4.36			
China (SSE Composite)	3,446.86	-0.81	-0.79	0.14	0.14	-0.75			
India (Sensex)	48,782.36	-1.98	1.89	-1.47	-1.47	2.16			



What Move the GCC markets ,

Oil Prices

Oil prices slipped on Friday, taking a breather after touching their highest in six weeks as concerns of wider lockdowns in India and Brazil to curb the Covid-19 pandemic offset a bullish outlook on summer fuel demand and economic recovery. Brent crude fell 1.91%, or \$1.31, to settle at \$67.25 per barrel.

Kuwait Market

The market closed today up by 0.82%, value traded 72.8 million KD, Premier market value traded reach 46.0 million KD and closed at 6,670 change by 0.72%.

Saudi Market

The Market closed down by 0.45 %, today market Performance are linked to oil prices raised to \$67.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



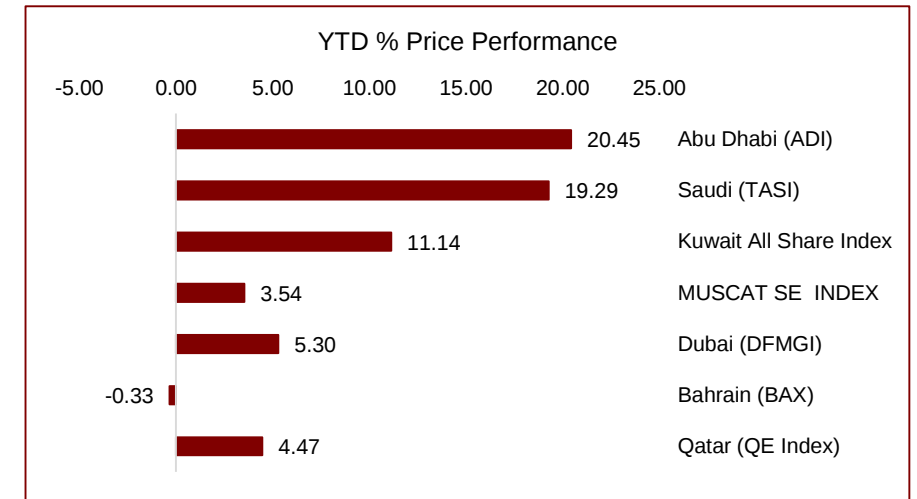
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.827	0.49	-0.12	2.48	2.48	3.38	5.92 KWD	1.53	27.00
KFH	0.728	0.69	-0.14	4.27	4.27	18.29	6.10 KWD	3.13	32.00
Zain	0.607	0.66	-0.16	0.33	0.33	0.17	2.61 KWD	1.98	14.09
BOUBYAN BANK	0.657	0.31	0.77	14.02	14.02	21.45	2.08 KWD	3.42	34.00
Agility	0.948	0.00	23.60	30.58	30.58	40.24	1.92 KWD	1.59	44.55
Saudi Arabia									
ARAMCO	35.45	0.14	0.14	-1.53	-1.53	1.29	7,080.38 SAR	7.14	38.69
SABIC	122.20	-1.45	2.00	4.09	4.09	20.51	372.02 SAR	2.22	35.00
STC	125.80	-0.94	0.32	-0.79	-0.79	18.68	254.00 SAR	3.97	23.13
AL-RAJHI BANK	98.90	0.00	2.17	0.10	0.10	34.38	247.26 SAR	4.17	22.08
NCB	55.60	-2.11	3.54	4.71	4.71	28.26	254.36 SAR	2.14	15.00
United Arab Emirates									
ETISALAT.AD	21.38	0.94	0.09	-1.20	-1.20	26.51	184.20 AED	4.12	20.03
FAB.AD	14.36	0.84	-0.69	-1.64	-1.64	11.32	155.50 AED	1.51	15.13
EMIRATES NBD	12.35	-0.80	2.92	7.39	7.39	19.90	78.64 AED	0.95	12.02
DB ISLAMIC BK	4.44	-0.22	-1.77	-2.42	-2.42	-3.69	32.22 AED	0.89	13.01
EMAAR PROPERT	3.84	2.95	-0.78	8.47	8.47	8.78	26.71 AED	0.47	10.21
Qatar									
QNB	17.98	0.45	0.17	-0.06	-0.06	0.84	165.33 QAR	1.79	15.39
INDUSTRIES QAT	13.45	-0.22	4.02	12.55	12.55	23.74	81.55 QAR	2.45	25.21
QA ISLAMIC BK	17.40	0.00	-0.63	5.35	5.35	1.34	41.12 QAR	1.86	14.07
MASRAF AL RAYA	4.47	-0.07	-0.11	4.08	4.08	-1.43	33.51 QAR	2.45	15.21
MESAIEED PETRO	1.91	-0.93	2.96	2.96	2.96	-6.45	24.25 QAR	1.55	28.38
OMAN									
BANK MUSCAT	0.392	0.51	0.52	1.56	1.56	8.33	1.39 OMR	0.69	8.33
OMANTEL	0.784	1.03	4.26	-0.51	-0.51	8.29	0.58 OMR	1.01	7.69
BANK DHOFAR	0.107	0.00	-1.83	-1.83	0.94	10.31	0.32 QAR	0.46	14.93
NAT BANK OF OMAN	0.160	1.27	3.23	6.67	6.67	0.00	0.26 QAR	0.48	12.71
OMINVEST	0.312	0.65	1.30	-2.50	-2.50	-7.69	0.25 QAR	0.94	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
14-Apr-21	19.72%	11.97%	0.06%	1.07%	0.33%	4.57%	2.62%	10.26%	5.04%	4.20%
21-Apr-21	19.76%	11.91%	0.06%	1.07%	0.34%	4.57%	2.63%	10.26%	5.04%	4.19%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market are up today by + 0.82 % The leading sector best performance indices today are Industrials 1.53 % Energy 1.31 % Financial services 1.31 % respectively

from YTD performance perspective the best sector performance are Basic materials by 31.51 % while the bottom sector performance is Utilities by -7.58 %

Telecommunication sector are up today by + 0.54 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -10.22 %

KSA

Saudi Armco are have positive performance today by + 0.14 %, SABIC have negative performance today by -1.45 %

STC are have negative performance today by -0.94 %, Al Rajhi Bank flat performance today 0 %

UAE

ETISALAT AD closed today up by 0.94% and act defensively with COVID19



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