



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

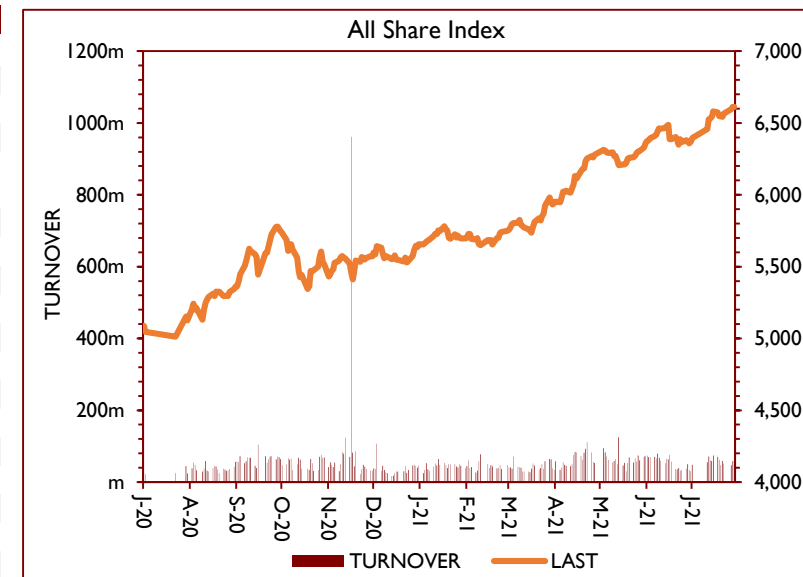
Thursday, September 2, 2021





Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,813.11	0.00	0.25	0.31	6.60	22.76	40.13 KWD	2.69	27.11
Kuwait Premier Index	7,458.81	-0.05	0.06	0.27	7.43	23.14	30.29 KWD	2.32	28.58
Kuwait Main Index	5,532.41	0.13	0.85	0.46	4.06	21.53	9.84 KWD	3.82	22.72
NIC 50	8,297.78	0.09	0.01	0.19	7.36	23.14	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,568.82	0.01	0.06	0.37	8.18	24.08	23.17 KWD	1.31	29.58
Telecom	1,101.54	-0.78	-0.15	-0.94	2.09	0.07	3.38 KWD	0.69	13.10
Industrials	1,170.63	-0.01	0.16	0.22	3.19	31.10	4.15 KWD	0.83	10.99
Financial services	1,267.95	0.28	0.77	0.80	9.82	36.62	3.17 KWD	0.78	10.58
Real estate	1,255.93	0.31	1.88	1.13	6.13	32.01	2.71 KWD	0.67	30.12
Basic materials	1,071.80	-0.14	-2.24	-0.85	-2.00	19.48	0.96 KWD	1.93	11.75
Health care	797.41	-0.90	-1.20	0.72	0.92	-3.54	0.40 KWD	4.59	13.44
Consumer services	762.61	0.73	2.91	3.05	-2.75	2.18	0.56 KWD	1.00	9.94
Insurance	1,453.11	1.21	0.60	-0.61	4.68	25.45	0.61 KWD	0.83	9.33
Consumer Disc	1,091.99	-0.51	2.81	-0.05	11.78	33.07	0.23 KWD	1.36	9.47
Energy	1,370.68	0.93	0.86	0.71	-4.10	7.39	0.29 KWD	1.01	14.55
Technology	742.05	0.99	1.98	2.79	-8.85	49.06	0.01 KWD	0.87	0.00
Utilities	623.68	0.85	1.72	1.29	3.51	-14.80	0.26 KWD	4.96	20.50



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,319.87	0.08	1.72	0.01	3.06	30.27	9,817 SAR	2.77	20.16
Qatar (QE Index)	11,071.16	-0.22	-0.28	-0.20	3.17	6.09	564 QAR	1.55	15.92
Dubai (DFMGI)	2,912.37	-0.15	0.40	0.30	3.59	16.84	318 AED	1.62	20.09
Abu Dhabi (ADI)	7,652.98	0.05	0.26	-0.52	11.84	51.52	1,361 AED	1.76	24.04
Bahrain (BAX)	1,663.44	0.18	-0.19	1.10	4.75	11.66	17 BHD	1.17	11.01
MUSCAT SE INDEX	3,974.15	-0.01	0.30	0.19	-2.19	8.62	5 OMR	0.91	13.25
Developed Markets									
MSCI World Index	3,161.46	0.31	0.97	0.72	4.86	17.62			
U.S. (S&P 500)	4,536.95	0.28	0.58	0.28	5.54	20.75			
U.K. (FTSE 100)	7,163.90	0.20	-0.14	0.26	1.43	10.49			
Japan (Topix)	1,983.57	0.14	4.49	2.79	3.70	11.68			
Emerging Markets									
MSCI EM Index	1,311.91	-0.04	3.40	0.55	-4.27	1.91			
China (SSE Composite)	3,597.04	0.84	1.69	1.07	-0.26	3.13			
India (Sensex)	57,852.54	0.90	3.57	1.00	10.76	21.73			

What Move the GCC markets ,

Oil Prices

Oil prices edged higher on Thursday, supported by a sharp decline in U.S. crude stocks and a weaker dollar, though gains were capped by an OPEC+ decision to stick to its policy of gradually increasing output, Brent crude was up 45 cents, or 0.6%, at \$72.04 a barrel.

Kuwait Market

The market closed flat today, value traded 50.0 million KD, Premier market value traded reached 32.2 million KD and closed at 7,458 change by - 0.05%.

Saudi Market

The Market closed up today by + 0.08%, with positive macroeconomic sentiments bounce of oil reaching \$72.04 recouping some of the losses in the previous session when prices hit a three-week low.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



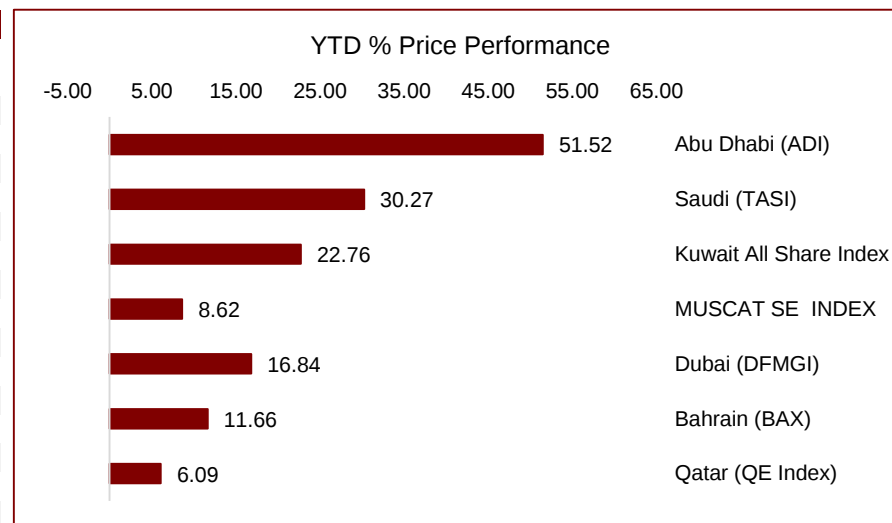
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.940	0.11	0.00	0.32	10.60	17.38	6.76 KWD	1.79	27.00
KFH	0.824	0.00	0.61	-0.24	8.56	33.88	6.96 KWD	3.29	32.00
Zain	0.602	-0.99	-0.33	-1.31	2.38	-0.49	2.61 KWD	2.25	13.91
BOUBYAN BANK	0.791	0.25	-0.25	0.89	7.92	46.04	2.52 KWD	3.63	34.00
Agility	1.003	-0.20	-0.30	0.20	9.04	62.88	2.24 KWD	1.80	27.99
Saudi Arabia									
ARAMCO	35.10	0.29	0.72	-0.14	0.00	0.29	7,020.00 SAR	6.82	26.34
SABIC	122.20	-0.16	1.50	-0.65	0.33	20.51	366.60 SAR	2.16	35.00
STC	132.40	-1.05	1.85	-1.93	0.61	24.91	264.80 SAR	4.14	24.04
AL-RAJHI BANK	120.40	0.00	0.84	-0.50	8.47	63.59	301.00 SAR	5.04	23.66
NCB	61.20	0.00	4.26	0.66	6.25	41.18	274.05 SAR	1.72	16.79
United Arab Emirates									
ETISALAT.AD	23.38	-0.51	-2.44	-1.86	5.27	37.04	203.33 AED	4.31	22.09
FAB.AD	17.04	0.83	0.24	0.24	2.04	32.09	186.08 AED	1.76	17.30
EMIRATES NBD	13.90	0.00	0.00	0.36	4.91	34.95	87.80 AED	1.05	12.59
DB ISLAMIC BK	5.09	0.00	-1.36	-0.59	5.19	9.98	36.86 AED	1.00	15.42
EMAAR PROPERT	4.23	-0.70	2.42	0.95	1.92	20.11	30.29 AED	0.54	13.95
Qatar									
QNB	18.94	-1.15	-0.99	-1.20	5.52	6.23	175.76 QAR	1.81	15.37
INDUSTRIES QAT	13.00	0.00	0.93	1.17	-1.89	19.60	79.02 QAR	2.23	15.64
QA ISLAMIC BK	18.30	0.00	-0.76	0.00	5.84	6.96	43.44 QAR	1.88	14.28
MASRAF AL RAYA	4.52	0.02	-0.92	-0.64	1.39	-0.20	34.07 QAR	2.38	15.17
MESAIEED PETRO	2.00	-0.20	0.45	-0.25	6.00	-2.54	25.18 QAR	1.55	19.18
OMAN									
BANK MUSCAT	0.442	-0.45	0.45	0.45	4.25	22.78	1.58 OMR	0.77	8.33
OMANTEL	0.760	0.00	-2.56	0.53	-4.52	4.97	0.57 OMR	1.03	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	0.185	-1.07	-1.07	-1.60	-7.50	15.63	0.30 QAR	0.55	12.71
OMINVEST	0.314	0.00	1.92	0.00	1.92	-5.92	0.26 QAR	0.95	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
25-Aug-21	20.33%	11.14%	0.06%	0.38%	0.35%	4.91%	2.67%	10.80%	5.14%	4.18%
1-Sep-21	20.50%	10.95%	0.06%	0.36%	0.35%	4.84%	2.70%	10.86%	5.21%	4.23%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is down today by -0.003 % The leading sector bottom performance indices today are Health care -0.90 % Telecom -0.78 % Consumer Disc -0.51 % 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 -0.78 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-22.69 %

KSA

Saudi Armco has positive performance today by + 0.29 %, SABIC has negative performance today by - 0.16 %

STC has negative performance today by - 1.05 %, Al Rajhi Bank has flat performance today

UAE

ETISALAT AD closed down today by - 0.51%, and act defensively with COVID19



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