



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Sunday, November 21, 2021

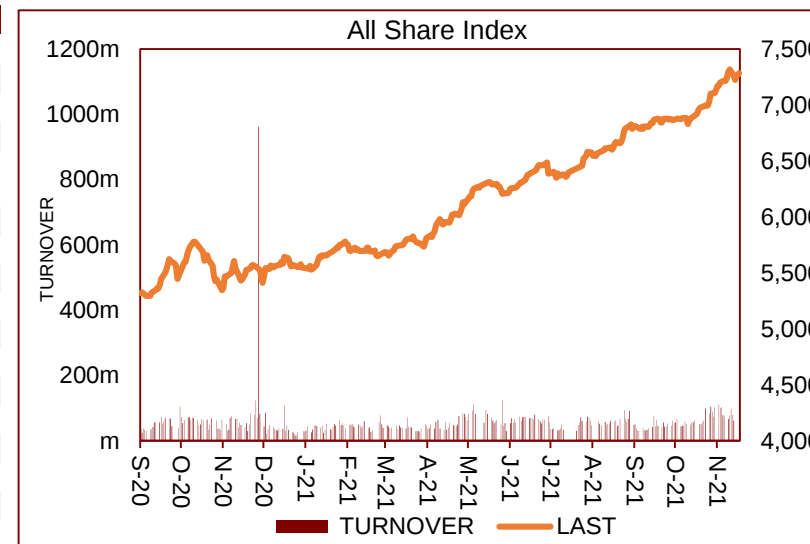




### Market Watch

| Description            | Close    | Day Δ | WTD   | MTD   | QTD   | YTD    | M Cap (in Bn) | PBV  | PE    |
|------------------------|----------|-------|-------|-------|-------|--------|---------------|------|-------|
| <b>Kuwait</b>          |          | %     | %     | %     | %     | %      |               |      |       |
| Kuwait All Share Index | 7,255.22 | -0.39 | -0.84 | 2.10  | 5.71  | 30.84  | 43.06 KWD     | 2.12 | 26.57 |
| Kuwait Premier Index   | 7,861.18 | -0.28 | -0.82 | 2.19  | 4.87  | 29.92  | 32.12 KWD     | 2.29 | 27.05 |
| Kuwait Main Index      | 6,081.96 | -0.72 | -0.64 | 1.82  | 8.33  | 33.70  | 10.94 KWD     | 1.63 | 25.27 |
| NIC 50                 | 8,852.99 | 0.44  | -0.87 | 2.11  | 4.80  | 29.92  | 28.60 KWD     | 2.27 | 26.05 |
| <b>Kuwait Sector</b>   |          |       |       |       |       |        |               |      |       |
| Banking                | 1,660.09 | -0.20 | -0.20 | 2.48  | 5.32  | 31.50  | 24.59 KWD     | 1.26 | 28.05 |
| Telecom                | 1,100.95 | 0.11  | 0.11  | -0.20 | 0.49  | -0.12  | 3.37 KWD      | 0.89 | 13.65 |
| Industrials            | 1,227.22 | -0.65 | -0.65 | 2.00  | 5.15  | 37.72  | 4.38 KWD      | 1.05 | 15.11 |
| Financial services     | 1,449.80 | -1.10 | -1.10 | 0.80  | 9.92  | 55.94  | 3.79 KWD      | 0.93 | 12.45 |
| Real estate            | 1,403.83 | -0.91 | -0.91 | 2.53  | 9.72  | 47.36  | 3.04 KWD      | 0.82 | 58.07 |
| Basic materials        | 1,092.06 | -0.49 | -0.49 | -0.68 | 0.31  | 21.53  | 0.98 KWD      | 1.84 | 29.38 |
| Health care            | 791.93   | 0.00  | 0.00  | -0.37 | -0.50 | -4.20  | 0.39 KWD      | 4.58 | 11.61 |
| Consumer services      | 754.03   | -0.68 | -0.68 | -2.83 | -3.76 | 1.03   | 0.71 KWD      | 0.92 | 16.22 |
| Insurance              | 1,611.65 | -1.52 | -1.52 | 9.09  | 11.14 | 39.40  | 0.68 KWD      | 0.86 | 8.53  |
| Consumer Disc          | 1,371.25 | 0.15  | 0.15  | 8.49  | 22.74 | 67.51  | 0.23 KWD      | 1.39 | 9.29  |
| Energy                 | 1,455.12 | -0.11 | -0.11 | -0.26 | 5.69  | 13.92  | 0.30 KWD      | 1.10 | 16.25 |
| Technology             | 756.60   | -1.89 | -1.89 | -1.89 | 5.91  | 50.51  | 0.01 KWD      | 0.90 | 0.00  |
| Utilities              | 621.05   | 0.00  | -1.26 | 0.00  | -0.42 | -14.80 | 0.26 KWD      | 4.24 | 20.31 |

| Description              | Close     | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|--------------------------|-----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>GCC Markets</b>       |           | %     | %     | %     | %     | %     |               |      |       |
| Saudi (TASI)             | 11,485.94 | -1.92 | -1.78 | -1.73 | 0.06  | 32.18 | 10,299 SAR    | 2.52 | 18.84 |
| Qatar (QE Index)         | 11,913.81 | -0.30 | -0.93 | 1.39  | 3.86  | 14.16 | 603 QAR       | 1.73 | 16.47 |
| Dubai (DFMGI)            | 3,257.79  | -0.23 | 3.72  | 13.74 | 14.49 | 30.73 | 353 AED       | 1.63 | 24.97 |
| Abu Dhabi (ADI)          | 8,336.49  | -0.15 | 0.61  | 5.99  | 8.28  | 65.23 | 1,413 AED     | 1.85 | 23.10 |
| Bahrain (BAX)            | 1,793.52  | 0.14  | 0.23  | 2.89  | 5.16  | 20.39 | 18 BHD        | 1.54 | 9.94  |
| MUSCAT SE INDEX          | 4,065.60  | 0.04  | 1.35  | -0.23 | 3.12  | 11.12 | 5 OMR         | 0.88 | 13.25 |
| <b>Developed Markets</b> |           |       |       |       |       |       |               |      |       |
| MSCI World Index         | 3,219.90  | -0.20 | -0.12 | 1.42  | 7.09  | 19.70 |               |      |       |
| U.S. (S&P 500)           | 4,697.96  | 0.33  | 0.32  | 2.01  | 9.06  | 25.08 |               |      |       |
| U.K. (FTSE 100)          | 7,223.57  | -0.45 | -1.69 | -0.19 | 1.94  | 11.81 |               |      |       |
| Japan (Topix)            | 2,044.53  | 0.44  | 0.19  | 2.17  | 0.71  | 13.29 |               |      |       |
| <b>Emerging Markets</b>  |           |       |       |       |       |       |               |      |       |
| MSCI EM Index            | 1,269.22  | -0.37 | -1.26 | 0.35  | 1.29  | -1.71 |               |      |       |
| China (SSE Composite)    | 3,560.37  | 1.13  | 0.60  | 0.37  | -0.22 | 2.51  |               |      |       |
| India (Sensex)           | 59,636.01 | -0.62 | -1.73 | 0.55  | 0.86  | 24.89 |               |      |       |



### What Move the GCC markets ,

#### Oil Prices

Oil prices fell to a six-week low on Friday as new Covid lockdowns sparked demand concerns just as industry players signal a return of supply, The U.S. benchmark for oil sank more than 4% to a session low of \$75.37, a price not seen since Oct. 7.

#### Kuwait Market

The market closed today down by - 0.39%, value traded 61.6 million KD, Premier market value traded reached 24.9 million KD and closed at 7,861.18 down by - 0.28%.

#### Saudi Market

The Market closed down by - 1.92%, with positive macroeconomic sentiments bounce of oil reaching \$75.37.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



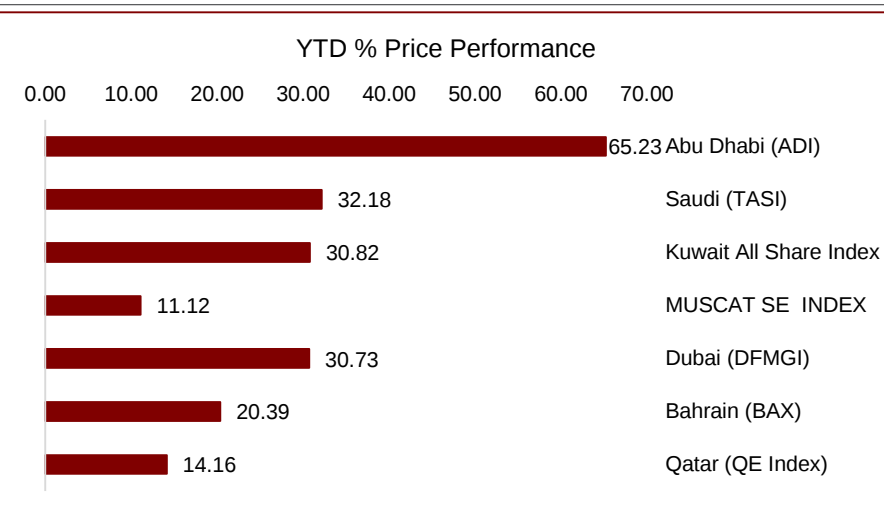
| Description                 | Close  | Day Δ | WTD   | MTD   | QTD    | YTD   | M Cap (in Bn) | PBV  | PE    |
|-----------------------------|--------|-------|-------|-------|--------|-------|---------------|------|-------|
| <b>Blue Chip Watch</b>      |        | %     | %     | %     | %      | %     |               |      |       |
| <b>Kuwait</b>               |        |       |       |       |        |       |               |      |       |
| NBK                         | 1.038  | 0.19  | -1.05 | 4.95  | 9.02   | 29.88 | 7.45 KWD      | 1.92 | 27.00 |
| KFH                         | 0.845  | -0.12 | -0.24 | 1.08  | 2.80   | 37.30 | 7.14 KWD      | 3.29 | 32.00 |
| Zain                        | 0.597  | 0.17  | 0.17  | -0.33 | -0.33  | -1.49 | 2.58 KWD      | 2.17 | 13.65 |
| BOUBYAN BANK                | 0.814  | -0.49 | -0.97 | 3.82  | 6.12   | 50.66 | 2.60 KWD      | 3.71 | 34.00 |
| Agility                     | 1.033  | -0.96 | 1.18  | 4.55  | 4.87   | 68.09 | 2.32 KWD      | 1.07 | 2.22  |
| <b>Saudi Arabia</b>         |        |       |       |       |        |       |               |      |       |
| ARAMCO                      | 36.10  | -1.90 | -3.60 | -4.49 | 0.56   | 3.43  | 7,360.20 SAR  | 6.88 | 22.41 |
| SABIC                       | 122.20 | -2.40 | -4.83 | -3.63 | -4.08  | 20.51 | 375.61 SAR    | 2.16 | 35.00 |
| STC                         | 113.60 | -1.39 | -1.22 | -1.22 | -10.39 | 7.36  | 230.41 SAR    | 3.36 | 20.54 |
| AL-RAJHI BANK               | 141.60 | -2.21 | -4.97 | 1.87  | 15.50  | 92.39 | 362.01 SAR    | 5.69 | 26.60 |
| NCB                         | 67.50  | -2.03 | -3.43 | 3.68  | 10.10  | 55.94 | 308.54 SAR    | 1.91 | 20.19 |
| <b>United Arab Emirates</b> |        |       |       |       |        |       |               |      |       |
| ETISALAT.AD                 | 28.78  | 2.86  | 3.53  | 12.42 | 19.82  | 70.30 | 243.34 AED    | 5.28 | 26.36 |
| FAB.AD                      | 19.44  | -1.32 | 1.67  | 9.21  | 9.34   | 50.70 | 215.12 AED    | 1.97 | 17.70 |
| EMIRATES NBD                | 14.15  | -0.35 | -0.70 | 2.91  | -0.35  | 37.38 | 89.70 AED     | 1.05 | 11.24 |
| DB ISLAMIC BK               | 5.51   | -0.54 | 2.23  | 7.83  | 11.31  | 19.52 | 40.11 AED     | 1.05 | 14.77 |
| EMAAR PROPERT               | 5.13   | 0.20  | 6.21  | 26.98 | 25.74  | 45.33 | 36.66 AED     | 0.64 | 13.29 |
| <b>Qatar</b>                |        |       |       |       |        |       |               |      |       |
| QNB                         | 20.80  | -0.95 | -0.67 | 2.50  | 9.19   | 17.27 | 193.64 QAR    | 1.94 | 16.47 |
| INDUSTRIES QAT              | 15.84  | 0.51  | -0.69 | -2.22 | 2.52   | 45.72 | 95.19 QAR     | 2.55 | 14.31 |
| QA ISLAMIC BK               | 18.27  | 0.66  | -0.11 | 0.44  | 0.16   | 6.84  | 42.81 QAR     | 1.79 | 13.53 |
| MASRAF AL RAYA              | 4.86   | -0.61 | -2.00 | 3.40  | 8.51   | 7.28  | 36.61 QAR     | 2.47 | 16.47 |
| MESAIEED PETRO              | 2.26   | -2.21 | -3.15 | 3.45  | 0.84   | 11.19 | 29.00 QAR     | 1.74 | 17.72 |
| <b>OMAN</b>                 |        |       |       |       |        |       |               |      |       |
| BANK MUSCAT                 | 0.488  | -1.61 | 2.47  | 2.47  | 10.67  | 38.33 | 1.77 OMR      | 0.84 | 8.33  |
| OMANTEL                     | 0.740  | -0.54 | 0.00  | -3.14 | 0.00   | 2.21  | 0.56 OMR      | 0.99 | 7.69  |
| BANK DHOFAR                 | 0.132  | 0.00  | 2.31  | 2.31  | 13.68  | 37.11 | 0.40 QAR      | 0.56 | 14.93 |
| NAT BANK OF OMAN            | 0.194  | 2.65  | 0.00  | 0.00  | 4.86   | 21.25 | 0.31 QAR      | 0.56 | 12.71 |
| OMINVEST                    | 0.314  | 0.00  | -0.63 | 1.29  | 0.00   | -7.10 | 0.25 QAR      | 0.92 | 6.85  |

| Foreign Holding |        |        |       |       |         |       |       |        |       |       |
|-----------------|--------|--------|-------|-------|---------|-------|-------|--------|-------|-------|
| Date            | NBK    | GBK    | CBK   | ABK   | MUTAHED | KIB   | BURG  | KFH    | BOUB  | WARBA |
| 10-Nov-21       | 20.82% | 10.79% | 0.06% | 0.32% | 0.40%   | 4.62% | 2.73% | 10.78% | 5.28% | 4.33% |
| 17-Nov-21       | 20.92% | 11.68% | 0.06% | 0.29% | 0.41%   | 4.63% | 2.76% | 10.64% | 5.28% | 4.33% |

### End of Report

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### Leading Sector Performance

The market is down today by -0.39 % The leading sector bottom performance indices today are Technology -1.89 % Insurance -1.52 % Financial services -1.1 % respectively

Telecommunication sector are up today by + 0.11 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -30.96 %

### KSA

Saudi Armco has a negative performance today by -1.90 %, SABIC has a negative performance today by -2.40 %

STC has a negative performance today by -1.39 %, Al Rajhi Bank has a negative performance today by -2.21 %

### UAE

ETISALAT AD closed up today by + 2.86 %, and act defensively with COVID19



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