



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MORNING BRIEF

Tuesday, June 22, 2021

DAILY MARKETS WRAP,

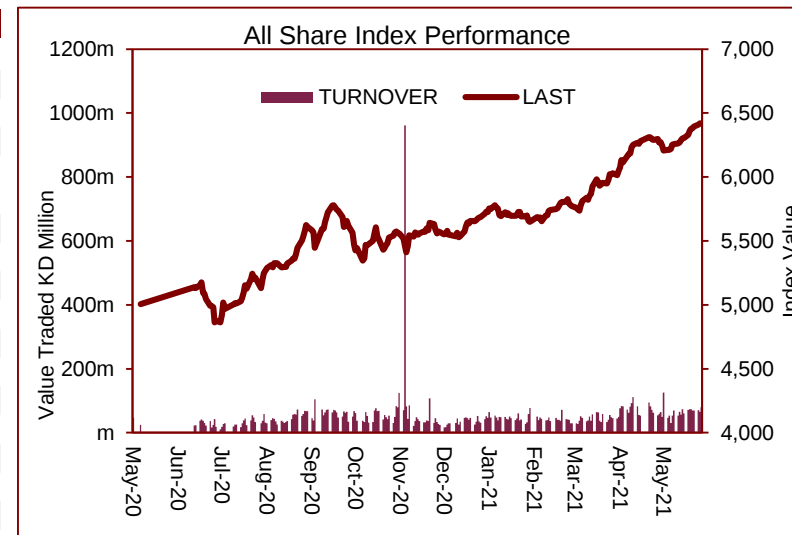
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Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,445.80	0.42	0.82	3.78	11.60	16.22	37.71 KWD	2.12	34.40
Kuwait Premier Index	7,006.01	0.50	0.84	3.95	10.78	15.78	28.25 KWD	2.28	36.18
Kuwait Main Index	5,352.33	0.17	0.90	3.43	14.35	17.74	9.46 KWD	1.62	29.29
NIC 50	7,813.58	0.55	0.79	3.87	10.71	15.78	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,455.53	0.40	0.78	4.79	10.75	15.29	21.37 KWD	1.38	37.18
Telecom	1,070.44	-0.54	-1.14	-1.77	-3.97	-2.89	3.29 KWD	0.65	13.93
Industrials	1,164.79	1.34	2.63	3.44	26.49	30.71	4.07 KWD	0.84	14.41
Financial services	1,170.17	0.43	1.40	3.23	18.81	25.86	3.00 KWD	0.76	10.43
Real estate	1,223.03	1.35	1.27	5.47	20.28	28.38	2.60 KWD	0.70	44.91
Basic materials	1,141.27	0.40	0.14	3.27	4.79	27.01	1.01 KWD	1.99	12.62
Health care	767.81	-1.87	-2.45	-2.87	-5.24	-7.12	0.39 KWD	4.17	38.42
Consumer services	797.50	-0.09	-0.77	1.62	12.68	6.85	0.51 KWD	0.88	9.46
Insurance	1,337.51	-1.16	3.99	7.19	11.36	15.68	0.51 KWD	0.88	9.41
Consumer Disc	981.08	0.61	0.01	3.44	16.03	19.85	0.24 KWD	1.37	8.98
Energy	1,476.66	-1.49	-2.29	5.45	20.52	15.61	0.31 KWD	1.12	14.81
Technology	800.25	-5.98	-6.78	28.21	34.15	59.19	0.01 KWD	0.99	0.00
Utilities	618.42	0.00	-0.84	-2.08	-12.31	-15.16	0.26 KWD	3.69	21.00

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,891.64	0.30	0.50	3.37	10.08	25.52	9,729 SAR	2.75	22.00
Qatar (QE Index)	10,776.49	0.34	0.43	0.39	3.74	3.39	539 QAR	1.53	20.15
Dubai (DFMGI)	2,856.39	0.30	-0.22	2.10	12.01	14.62	314 AED	1.42	11.80
Abu Dhabi (ADI)	6,650.95	0.53	0.06	1.41	12.49	31.82	940 AED	1.77	12.50
Bahrain (BAX)	1,572.44	0.22	0.64	2.93	7.85	5.55	16 BHD	1.21	23.04
MUSCAT SE INDEX	4,035.49	0.31	-1.04	4.75	8.81	10.30	5 OMR	0.88	13.25
Developed Markets									
MSCI World Index	2,982.11	0.95	0.95	0.22	6.06	10.86			
U.S. (S&P 500)	4,224.79	0.33	1.40	0.49	6.34	12.48			
U.K. (FTSE 100)	7,088.45	0.37	1.01	0.94	5.58	9.72			
Japan (Topix)	1,959.53	3.16	0.67	1.90	0.28	8.58			
Emerging Markets									
MSCI EM Index	1,350.52	-0.79	-0.79	-1.87	2.59	4.59			
China (SSE Composite)	3,557.41	0.80	0.92	-1.61	3.36	2.43			
India (Sensex)	52,588.71	0.03	0.47	1.25	6.22	10.13			



What Move the GCC markets ,

Oil Prices

Crude dropped on Tuesday as investors cashed in on a recent rally, but market sentiment remained solid on hopes for a quick recovery in oil demand in the U.S. and European markets and fading expectations for an early return of Iranian crude, Brent crude futures for August eased 43 cents, or 0.6%, to \$74.47 a barrel.

Kuwait Market

The market closed today up by 0.42%, value traded 79.6 million KD, Premier market value traded reached 43.6 million KD and closed at 7,006 change by 0.50%.

Saudi Market

The Market closed up today by 0.30%, today market Performance is linked to oil prices raised to \$74.

DAILY MARKETS WRAP,

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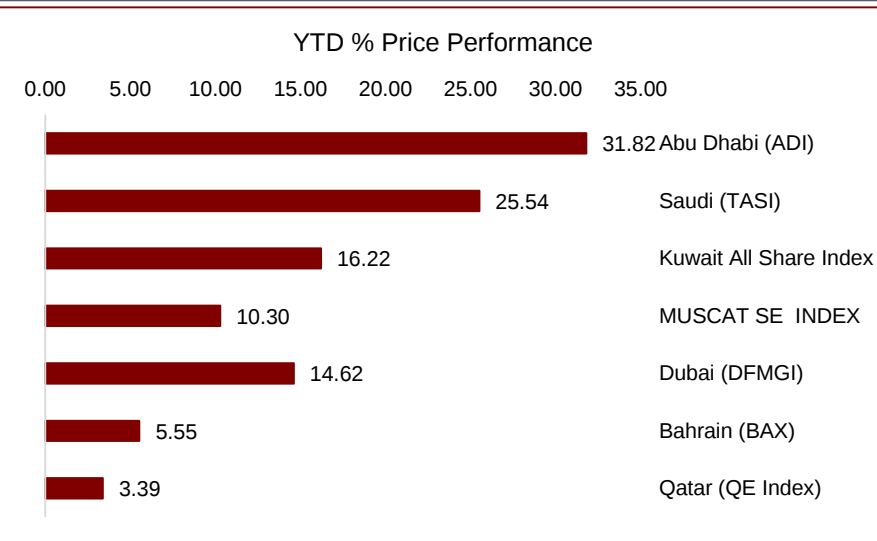
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.847	0.36	0.47	2.05	4.96	5.88	6.06 KWD	1.57	27.00
KFH	0.777	0.00	0.78	4.43	11.43	26.41	6.55 KWD	3.49	32.00
Zain	0.582	-0.68	-1.36	-2.18	-3.80	-3.96	2.53 KWD	2.26	13.93
BOUBYAN BANK	0.720	0.56	1.27	7.30	24.96	33.10	2.27 KWD	3.74	34.00
Agility	0.967	2.65	4.66	5.11	46.36	57.19	2.10 KWD	1.72	46.76
Saudi Arabia									
ARAMCO	35.30	0.00	0.14	0.00	-1.94	0.86	7,060.00 SAR	6.98	35.27
SABIC	122.00	0.66	-0.33	-1.93	3.75	20.12	363.60 SAR	2.12	35.00
STC	132.80	-0.60	2.30	7.06	5.21	25.85	267.20 SAR	4.10	24.00
AL-RAJHI BANK	110.00	-0.54	0.00	6.59	11.34	49.46	276.50 SAR	4.67	23.37
NCB	56.70	2.53	4.76	7.72	7.72	31.95	247.63 SAR	1.99	14.15
United Arab Emirates									
ETISALAT.AD	22.22	0.18	0.18	2.59	2.68	31.48	192.90 AED	4.32	20.97
FAB.AD	16.58	0.97	0.12	-1.66	13.56	28.53	179.31 AED	1.74	17.44
EMIRATES NBD	13.90	0.00	-0.71	0.72	20.87	34.95	87.80 AED	1.06	13.42
DB ISLAMIC BK	4.89	0.20	-1.01	2.52	7.47	6.07	35.33 AED	0.98	14.27
EMAAR PROPERT	4.17	1.21	1.46	5.57	17.80	18.13	29.50 AED	0.53	11.97
Qatar									
QNB	17.80	0.00	0.62	1.19	-0.44	0.45	161.92 QAR	1.78	15.30
INDUSTRIES QAT	13.26	0.00	-0.30	2.71	10.96	21.99	79.01 QAR	2.41	24.79
QA ISLAMIC BK	17.29	1.11	1.35	-0.12	4.98	0.99	39.79 QAR	1.83	13.82
MASRAF AL RAYA	4.45	0.00	-0.16	0.04	3.78	-1.72	32.87 QAR	2.44	15.15
MESAIEED PETRO	1.89	0.26	0.58	0.58	1.88	-7.43	23.35 QAR	1.52	27.75
OMAN									
BANK MUSCAT	0.414	0.98	-2.36	6.15	7.81	15.00	1.47 OMR	0.73	8.33
OMANTEL	0.788	1.03	-1.50	0.00	0.00	8.84	0.58 OMR	1.09	7.69
BANK DHOFAR	0.123	0.00	-1.60	7.89	16.04	26.80	0.37 QAR	0.52	14.93
NAT BANK OF OMAN	0.198	0.00	0.00	18.56	32.00	23.75	0.32 QAR	0.60	12.71
OMINVEST	0.318	0.63	0.00	-0.62	-0.62	-5.92	0.26 QAR	0.98	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
9-Jun-21	19.85%	11.93%	0.06%	0.44%	0.32%	4.79%	2.62%	10.43%	5.02%	4.11%
16-Jun-21	19.92%	12.77%	0.06%	0.43%	0.32%	4.89%	2.59%	10.50%	5.06%	4.11%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is up today by + 0.42 % The leading sector best performance indices today are Industrials 1.34 % Consumer Disc 0.61 % Financial services 0.43 % respectively

from YTD performance prespective the best sector performance is Industrials by 30.71 % while the bottom sector performance is Utilities by -15.16 %

Telecommunication sector are down today by -0.54 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -19.11 %

KSA

Saudi Armco flat performance today 0 %, SABIC have positive performance today by + 0.66 %

STC have negative performance today by -0.60 %, Al Rajhi Bank have negative performance today by -0.54 %

UAE

ETISALAT AD closed up today by 0.18% , and act defensively with COVID19



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