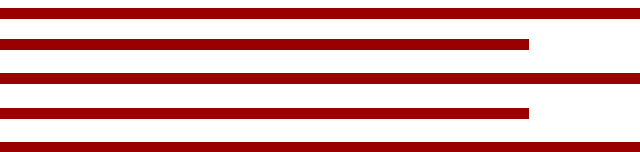


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MORNING BRIEF

Thursday, August 19, 2021

DAILY MARKETS WRAP,

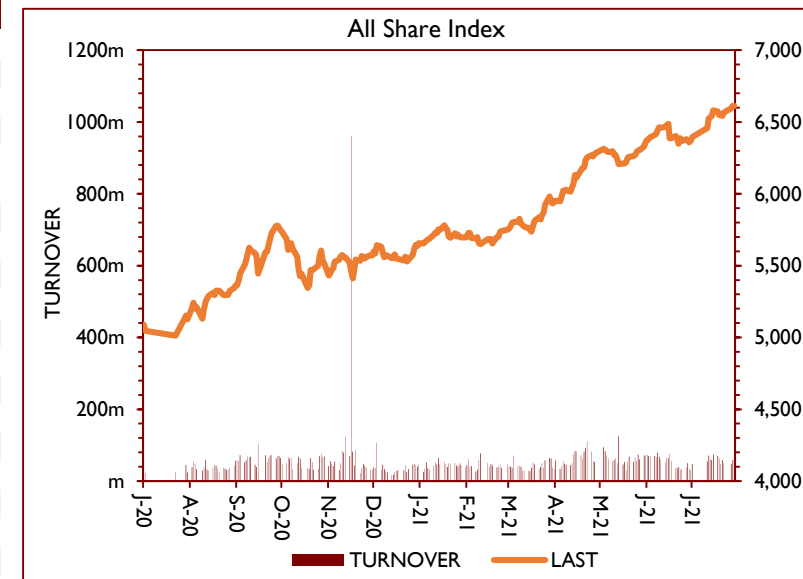
NIC RESEARCH AND STUDIES DEP



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,668.22	0.25	0.84	1.33	4.41	20.23	39.15 KWD	2.46	28.57
Kuwait Premier Index	7,291.52	0.23	1.16	1.77	5.12	20.50	29.49 KWD	2.26	27.99
Kuwait Main Index	5,434.77	0.31	-0.13	-0.05	2.22	19.38	9.66 KWD	3.04	30.48
NIC 50	8,103.65	0.24	1.11	1.69	5.05	20.50	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,530.62	0.35	1.56	2.00	5.71	21.24	22.45 KWD	1.30	28.99
Telecom	1,092.28	0.57	0.78	0.22	1.09	-0.91	3.34 KWD	0.73	13.70
Industrials	1,155.02	-0.35	-0.74	-0.40	2.03	29.62	4.13 KWD	0.82	11.75
Financial services	1,243.99	0.73	-0.35	2.23	7.56	33.80	3.11 KWD	0.77	7.96
Real estate	1,217.62	-0.05	-0.74	0.69	2.76	27.82	2.63 KWD	0.67	33.31
Basic materials	1,076.38	0.15	2.03	-0.06	-1.74	19.79	0.96 KWD	1.89	11.53
Health care	807.12	0.00	0.00	0.79	2.15	-2.36	0.40 KWD	3.72	31.58
Consumer services	745.09	-0.27	-0.42	-3.42	-4.99	-0.17	0.51 KWD	0.91	6.76
Insurance	1,407.72	-2.91	-0.31	0.21	1.60	21.76	0.61 KWD	0.84	9.40
Consumer Disc	1,032.63	1.58	0.64	-0.26	5.97	26.15	0.23 KWD	1.32	9.30
Energy	1,380.75	0.07	-0.99	-2.50	-3.47	8.10	0.29 KWD	1.00	14.66
Technology	763.88	0.00	4.90	0.96	-7.08	51.96	0.01 KWD	0.89	0.00
Utilities	589.47	0.00	-0.89	-1.32	-1.75	-19.13	0.25 KWD	4.71	19.46

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,201.64	-1.26	-0.92	1.87	2.14	28.11	9,814 SAR	2.77	20.49
Qatar (QE Index)	11,033.44	0.34	1.08	2.65	2.87	5.99	561 QAR	1.54	15.92
Dubai (DFMGI)	2,838.24	-0.83	0.84	2.62	0.98	14.96	313 AED	1.47	19.62
Abu Dhabi (ADI)	7,620.21	-0.97	0.34	4.13	11.48	52.08	1,357 AED	1.74	24.22
Bahrain (BAX)	1,638.10	0.09	0.43	2.57	3.16	10.47	17 BHD	1.17	11.23
MUSCAT SE INDEX	3,983.07	-0.20	-0.48	-1.17	-1.98	8.85	5 OMR	0.91	13.25
Developed Markets									
MSCI World Index	3,078.01	-0.71	-1.51	0.29	2.01	14.42			
U.S. (S&P 500)	4,400.27	0.33	-1.52	0.11	2.39	17.15			
U.K. (FTSE 100)	7,029.55	-1.95	-2.62	-0.04	-0.11	8.81			
Japan (Topix)	1,897.19	-1.39	-3.03	-0.20	-2.39	5.13			
Emerging Markets									
MSCI EM Index	1,261.60	0.46	-1.50	-1.27	-8.22	-2.30			
China (SSE Composite)	3,465.55	-0.57	-1.44	2.01	-3.50	-0.22			
India (Sensex)	55,629.49	-0.29	0.35	5.79	6.00	16.50			



What Move the GCC markets ,

Oil Prices

Oil prices closed out their biggest week of losses in more than nine months with another down day on Friday, as investors sold futures in anticipation of weakened fuel demand worldwide due to a surge in COVID-19 case, Brent crude fell 8% on the week, settling down \$1.27, or 1.9%, to \$65.18 a barrel

Kuwait Market

The market closed up by 0.25%, value traded 62.6 million KD, Premier market value traded reached 43.3 million KD and closed at 7,291 change by 0.23%.

Saudi Market

The Market closed down today by - 1.26%, with positive macroeconomic sentiments bounce of oil -1.9% recouping some of the losses in the previous session when prices hit a three-week low.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



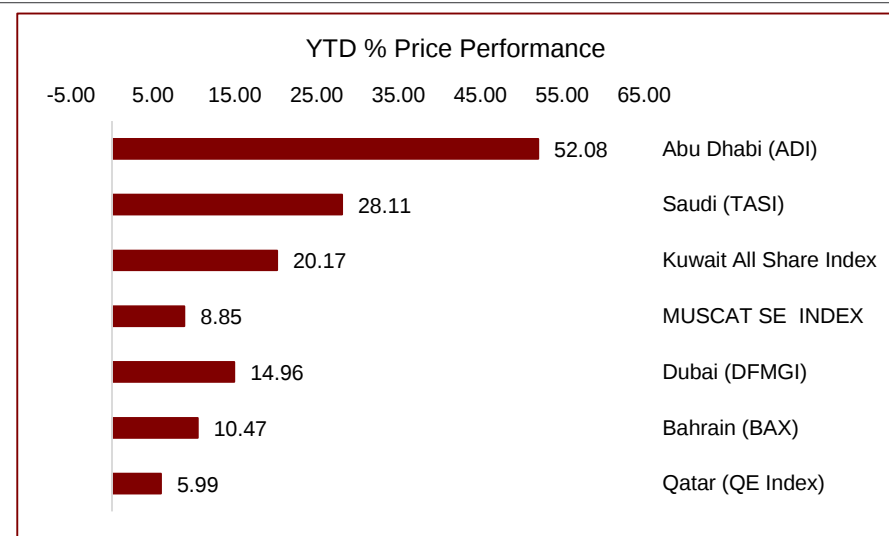
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.896	-0.44	0.56	0.22	5.54	12.00	6.49 KWD	1.71	27.00
KFH	0.805	0.75	2.41	2.68	6.19	30.96	6.76 KWD	3.19	32.00
Zain	0.598	0.84	1.18	1.18	1.53	-1.32	2.57 KWD	2.22	13.70
BOUBYAN BANK	0.782	-0.64	-0.25	-1.62	7.51	45.48	2.51 KWD	3.62	34.00
Agility	0.996	-0.60	-0.40	1.62	9.15	63.05	2.24 KWD	1.80	27.97
Saudi Arabia									
ARAMCO	34.95	-0.29	-0.57	0.43	-0.28	0.00	7,009.81 SAR	6.81	26.53
SABIC	121.60	-1.78	-0.16	1.32	0.66	20.91	371.39 SAR	2.19	35.00
STC	131.20	-2.81	-2.79	-1.19	0.61	24.91	269.99 SAR	4.22	24.79
AL-RAJHI BANK	122.20	-0.16	1.16	10.27	10.27	66.30	305.99 SAR	5.13	23.98
NCB	59.00	-1.67	-1.67	7.27	2.43	36.10	268.67 SAR	1.68	16.57
United Arab Emirates									
ETISALAT.AD	24.18	-2.34	0.33	6.05	9.91	43.08	215.33 AED	4.57	23.39
FAB.AD	16.82	-1.29	0.72	1.45	0.72	30.39	186.08 AED	1.76	17.30
EMIRATES NBD	13.50	-2.53	0.75	0.75	1.89	31.07	87.48 AED	1.05	12.55
DB ISLAMIC BK	5.06	0.60	0.80	4.76	4.98	9.76	36.42 AED	0.98	15.24
EMAAR PROPERT	4.08	-0.97	0.99	2.51	-1.92	15.58	29.50 AED	0.53	13.59
Qatar									
QNB	19.18	-1.13	1.42	6.10	7.58	8.30	178.75 QAR	1.85	15.74
INDUSTRIES QAT	13.09	-1.58	-1.80	-1.95	-1.21	20.42	80.27 QAR	2.28	16.00
QA ISLAMIC BK	18.03	3.56	4.17	4.53	4.11	5.20	41.04 QAR	1.79	13.58
MASRAF AL RAYA	4.49	1.93	1.93	3.68	0.45	-1.13	32.92 QAR	2.32	14.77
MESAIEED PETRO	1.94	-2.57	-1.68	1.26	2.87	-5.42	24.90 QAR	1.54	19.11
OMAN									
BANK MUSCAT	0.440	-0.45	-0.45	-1.79	3.77	22.22	1.58 OMR	0.77	8.33
OMANTEL	0.784	1.03	1.03	-1.01	-1.51	8.29	0.58 OMR	1.05	7.69
BANK DHOFAR	0.120	0.00	0.00	-2.44	-4.00	23.71	0.36 QAR	0.52	14.93
NAT BANK OF OMAN	0.188	1.08	-0.53	1.62	-6.00	17.50	0.30 QAR	0.55	12.71
OMINVEST	0.314	0.00	-0.63	0.00	0.64	-7.10	0.25 QAR	0.93	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
4-Aug-21	20.15%	12.15%	0.06%	0.39%	0.37%	4.67%	2.55%	10.64%	5.08%	4.14%
11-Aug-21	20.22%	11.87%	0.06%	0.38%	0.37%	4.68%	2.55%	10.69%	5.09%	4.14%

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, Boursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is up today by + 0.25 %The leading sector best performance indices today are Financial services 0.73 % Telecom 0.57 % Banking 0.35 % 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 up today by + 0.57 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-21.14 %

KSA

Saudi Armco has a negative performance today by - 0.29 %, SABIC has negative performance today - 1.78 %

STC has a negative performance today by - 2.81 %, Al Rajhi Bank has a negative performance today by - 0.16 %

UAE

ETISALAT AD closed down today by - 2.34%, 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