



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

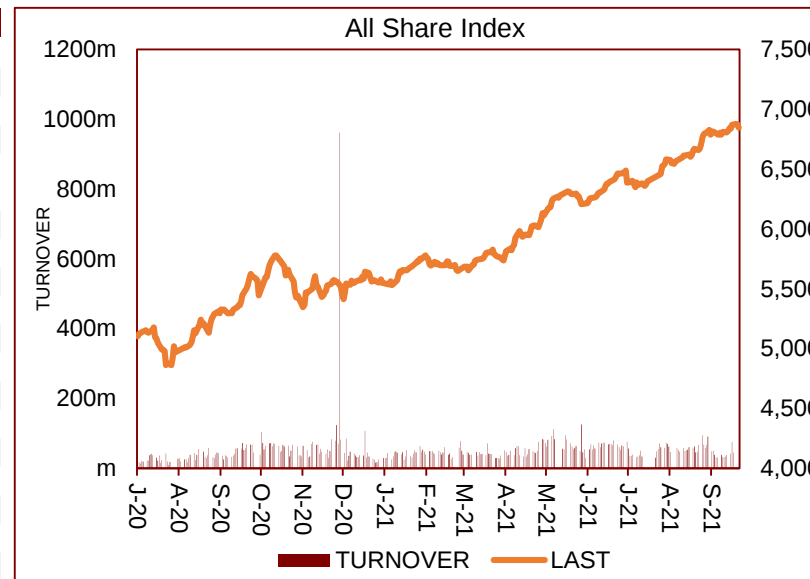
Wednesday, September 22, 2021





Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,845.34	0.00	-0.32	0.89	7.21	23.47	40.26 KWD	2.65	26.96
Kuwait Premier Index	7,481.32	-0.05	-0.33	0.74	7.94	23.73	30.36 KWD	2.32	28.40
Kuwait Main Index	5,588.45	0.18	-0.22	1.47	5.11	22.76	9.91 KWD	3.67	22.69
NIC 50	8,323.04	-0.02	-0.38	0.66	7.87	23.73	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,573.32	-0.11	-0.49	0.81	8.66	24.62	23.22 KWD	1.30	29.40
Telecom	1,097.30	0.23	-0.31	-1.45	1.56	-0.45	3.36 KWD	0.65	13.04
Industrials	1,166.41	0.11	-0.19	0.07	3.03	30.90	4.13 KWD	0.88	11.41
Financial services	1,308.08	0.25	-0.03	3.81	13.10	40.70	3.24 KWD	0.80	10.92
Real estate	1,271.36	0.04	-0.61	2.24	7.30	33.46	2.74 KWD	0.67	28.20
Basic materials	1,075.55	0.49	0.88	-0.67	-1.82	19.69	0.96 KWD	1.93	11.70
Health care	795.58	-0.04	-0.34	0.49	0.68	-3.76	0.39 KWD	4.50	13.33
Consumer services	774.56	0.09	1.89	4.67	-1.23	3.78	0.57 KWD	1.07	9.99
Insurance	1,444.16	0.30	-0.19	-1.04	4.23	24.91	0.60 KWD	0.80	9.80
Consumer Disc	1,104.62	0.02	-0.58	1.36	13.36	34.94	0.24 KWD	1.37	9.67
Energy	1,363.65	-0.38	0.01	0.12	-4.66	6.76	0.29 KWD	1.01	14.48
Technology	691.13	-5.00	-4.04	-5.19	-15.93	37.48	0.01 KWD	0.85	0.00
Utilities	621.05	0.00	0.00	1.29	3.51	-14.80	0.26 KWD	4.94	20.42



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,270.57	-0.40	-0.95	-0.05	3.00	29.70	9,785 SAR	2.71	20.16
Qatar (QE Index)	11,177.53	0.31	0.06	0.85	4.26	7.11	572 QAR	1.70	16.23
Dubai (DFMGI)	2,843.83	0.22	-1.97	-2.04	1.18	14.12	312 AED	1.55	19.24
Abu Dhabi (ADI)	7,781.83	0.35	-1.29	1.27	13.85	54.24	1,347 AED	1.77	24.89
Bahrain (BAX)	1,692.56	0.36	0.80	2.87	6.59	13.61	17 BHD	1.16	11.04
MUSCAT SE INDEX	3,917.21	-0.10	-0.45	-1.25	-3.60	7.06	5 OMR	0.89	13.25
Developed Markets									
MSCI World Index	3,074.35	0.81	-1.52	-2.92	1.08	13.37			
U.S. (S&P 500)	4,395.64	0.95	-1.78	-3.73	1.32	15.92			
U.K. (FTSE 100)	7,083.37	1.47	1.45	-0.78	0.38	9.35			
Japan (Topix)	2,043.55	-1.02	-2.70	4.23	5.14	13.24			
Emerging Markets									
MSCI EM Index	1,262.79	0.11	-1.40	-3.61	-8.24	-2.31			
China (SSE Composite)	3,628.49	0.40	0.40	2.39	1.04	4.48			
India (Sensex)	58,927.33	-0.13	-0.15	2.39	12.28	23.40			

What Move the GCC markets ,

Oil Prices

Oil prices climbed more than \$1 on Wednesday, extending overnight gains after industry data showed U.S. crude stocks fell more than expected last week in the wake of two hurricanes, highlighting tight supply as demand improves, Brent crude futures climbed 94 cents, or 1.3%, to \$75.30 a barrel.

Kuwait Market

The market closed flat today, value traded 42.2 million KD, Premier market value traded reached 23.0 million KD and closed at 7,481 change by - 0.05%.

Saudi Market

The Market closed down today by - 0.40%, with positive macroeconomic sentiments bounce of oil reaching \$75.30 or +1.3%.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



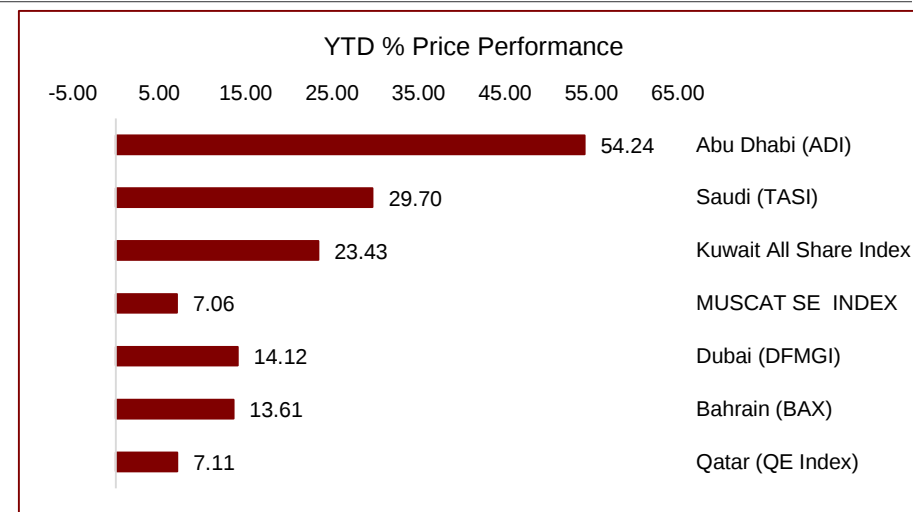
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	0.953	-0.42	-0.73	1.82	12.25	19.13	6.88 KWD	1.82	27.00
KFH	0.823	-0.12	-0.84	-0.36	8.43	33.72	6.96 KWD	3.29	32.00
Zain	0.600	0.33	-0.33	-1.96	1.70	-1.16	2.59 KWD	2.24	13.81
BOUBYAN BANK	0.767	-0.26	-1.92	-2.17	4.64	41.60	2.45 KWD	3.53	34.00
Agility	0.989	-0.10	-0.10	-1.10	7.63	60.77	2.21 KWD	1.78	27.63
Saudi Arabia									
ARAMCO	34.95	0.14	-0.57	-0.57	-0.43	-0.14	6,980.37 SAR	6.78	26.34
SABIC	122.20	-0.81	-0.65	0.00	0.99	21.30	369.62 SAR	2.18	35.00
STC	130.60	-0.31	-1.36	-3.11	-0.61	23.40	262.01 SAR	4.09	23.68
AL-RAJHI BANK	121.00	-0.98	-1.13	0.83	9.91	65.76	305.52 SAR	5.12	23.90
NCB	59.80	-0.83	-2.44	-1.32	4.17	38.41	270.04 SAR	1.68	16.57
United Arab Emirates									
ETISALAT.AD	24.32	0.33	-2.33	3.05	10.55	43.91	210.80 AED	4.47	22.90
FAB.AD	18.28	0.99	-2.25	7.53	9.46	41.71	197.65 AED	1.87	18.38
EMIRATES NBD	14.00	0.72	-1.75	1.08	5.66	35.92	87.80 AED	1.05	12.59
DB ISLAMIC BK	4.96	0.20	-1.20	-2.75	2.90	7.59	35.84 AED	0.97	15.00
EMAAR PROPERT	4.08	-0.49	-2.86	-2.86	-1.92	15.58	29.35 AED	0.52	13.52
Qatar									
QNB	19.00	0.26	-1.40	-0.73	6.02	6.73	176.60 QAR	1.81	15.38
INDUSTRIES QAT	13.90	2.06	3.56	8.56	5.28	28.33	83.14 QAR	2.33	16.39
QA ISLAMIC BK	17.98	0.11	-1.10	-1.69	4.05	5.14	42.82 QAR	1.85	14.01
MASRAF AL RAYA	4.45	-0.02	0.16	-2.22	-0.22	-1.79	33.67 QAR	2.34	14.93
MESAIEED PETRO	2.24	-1.63	1.82	11.95	18.97	9.38	28.84 QAR	1.77	21.88
OMAN									
BANK MUSCAT	0.440	-0.45	0.00	0.00	3.77	22.22	1.58 OMR	0.77	8.33
OMANTEL	0.744	0.00	-1.06	-1.59	-6.53	2.76	0.56 OMR	1.01	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	-0.54	-2.63	-1.60	-7.50	15.63	0.30 QAR	0.55	12.71
OMINVEST	0.308	-0.65	-1.28	-3.14	-1.28	-8.88	0.25 QAR	0.92	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
15-Sep-21	20.77%	10.56%	0.06%	0.35%	0.36%	4.68%	2.72%	10.92%	5.22%	4.19%
22-Sep-21	20.89%	9.91%	0.06%	0.37%	0.38%	4.58%	2.61%	11.00%	5.25%	4.11%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is flat today 0 %The leading sector best performance indices today are Insurance 0.3 % Financial services 0.25 % Telecom 0.23 % 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 + 0.23 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -23.92 %

KSA

Saudi Armco has a positive performance today by + 0.14 %, SABIC have negative performance today by - 0.81 %

STC has negative performance today - 0.31 %, Al Rajhi Bank have negative performance today by - 0.98 %

UAE

ETISALAT AD closed up today by + 0.33%, and act defensively with COVID19



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