



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, November 23, 2021

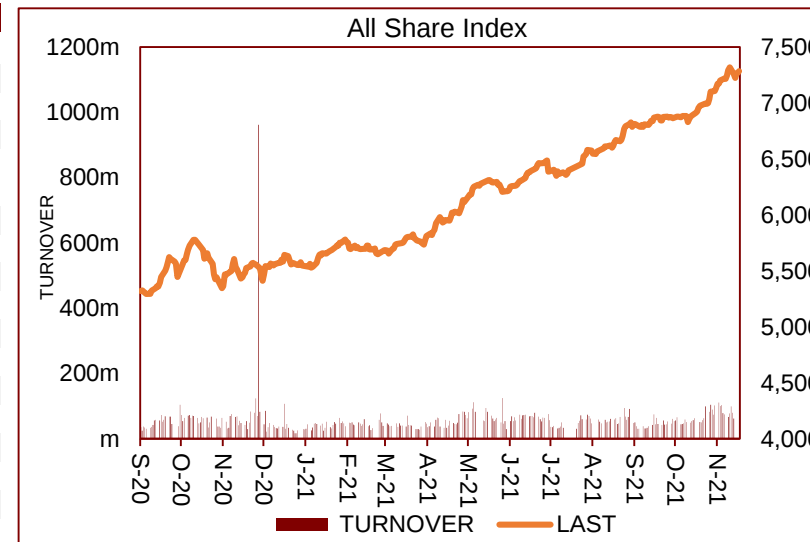




Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,177.23	-0.35	-1.46	0.97	4.55	29.41	42.59 KWD	2.10	26.44
Kuwait Premier Index	7,774.74	-0.32	-1.36	1.08	3.72	28.50	31.82 KWD	2.27	26.97
Kuwait Main Index	6,021.08	-0.46	-1.77	0.66	7.11	32.19	10.76 KWD	1.61	24.99
NIC 50	8,852.99	0.44	-1.41	1.00	3.65	28.50	28.60 KWD	2.25	25.97
Kuwait Sector									
Banking	1,640.17	-0.35	-1.40	1.25	4.06	29.92	24.37 KWD	1.24	27.97
Telecom	1,097.37	0.18	-0.22	-0.52	0.16	-0.45	3.36 KWD	0.88	13.58
Industrials	1,209.13	-0.34	-2.11	0.50	3.60	35.69	4.29 KWD	1.01	14.94
Financial services	1,446.57	-0.48	-1.32	0.58	9.68	55.59	3.74 KWD	0.91	11.24
Real estate	1,382.00	-0.50	-2.45	0.93	8.02	45.07	2.97 KWD	0.80	57.26
Basic materials	1,082.72	-0.77	-1.34	-1.53	-0.55	20.49	0.97 KWD	1.85	29.22
Health care	798.89	0.00	0.88	0.51	0.38	-3.36	0.40 KWD	4.58	12.15
Consumer services	751.32	-0.27	-1.03	-3.18	-4.11	0.66	0.70 KWD	0.91	16.08
Insurance	1,589.41	-0.14	-2.88	7.58	9.61	37.47	0.66 KWD	0.83	8.46
Consumer Disc	1,327.96	-1.85	-3.01	5.06	18.87	62.22	0.23 KWD	1.38	9.21
Energy	1,446.00	0.20	-0.73	-0.88	5.02	13.20	0.30 KWD	1.08	16.19
Technology	727.50	-1.96	-5.66	-5.66	1.83	44.72	0.01 KWD	0.88	0.00
Utilities	626.32	0.00	-0.42	0.85	0.42	-14.08	0.26 KWD	4.24	20.31

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,256.52	0.76	-4.52	-4.47	-2.74	29.54	9,904 SAR	2.44	18.24
Qatar (QE Index)	11,796.05	-0.12	-1.33	0.22	2.66	13.03	594 QAR	1.70	16.19
Dubai (DFMGI)	3,144.39	-0.86	-3.70	9.78	10.50	26.18	315 AED	1.58	23.25
Abu Dhabi (ADI)	8,407.52	0.75	0.70	6.90	9.21	66.64	1,425 AED	1.84	22.92
Bahrain (BAX)	1,785.76	-0.06	-0.30	2.45	4.70	19.87	18 BHD	1.59	9.91
MUSCAT SE INDEX	4,050.96	-0.26	-0.32	-0.59	2.75	10.72	5 OMR	0.87	13.25
Developed Markets									
MSCI World Index	3,201.49	-0.57	-0.57	0.84	6.48	19.01			
U.S. (S&P 500)	4,682.94	0.33	-0.32	1.68	8.72	24.68			
U.K. (FTSE 100)	7,243.06	-0.17	0.27	0.07	2.21	12.11			
Japan (Topix)	2,042.82	-0.08	-0.08	2.08	0.62	13.20			
Emerging Markets									
MSCI EM Index	1,261.56	-0.60	-0.60	-0.25	0.68	-2.30			
China (SSE Composite)	3,589.09	0.20	0.81	1.18	0.59	3.34			
India (Sensex)	58,664.33	0.34	-1.63	-1.08	-0.78	22.85			



What Move the GCC markets ,

Oil Prices

Oil prices fell on Tuesday, reversing gains the previous session on talk the United States, Japan and India will release crude reserves to tame prices despite the threat of faltering demand as Covid-19 cases flare up in Europe, Brent crude futures fell 67 cents, or 0.8%, to \$79.03 a barrel.

Kuwait Market

The market closed today down by - 0.35%, value traded 67.2 million KD, Premier market value traded reached 38.7 million KD and closed at 7,774.74 down by - 0.32%.

Saudi Market

The Market closed up by + 0.76%, with positive macroeconomic sentiments bounce of oil reaching \$79.03.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



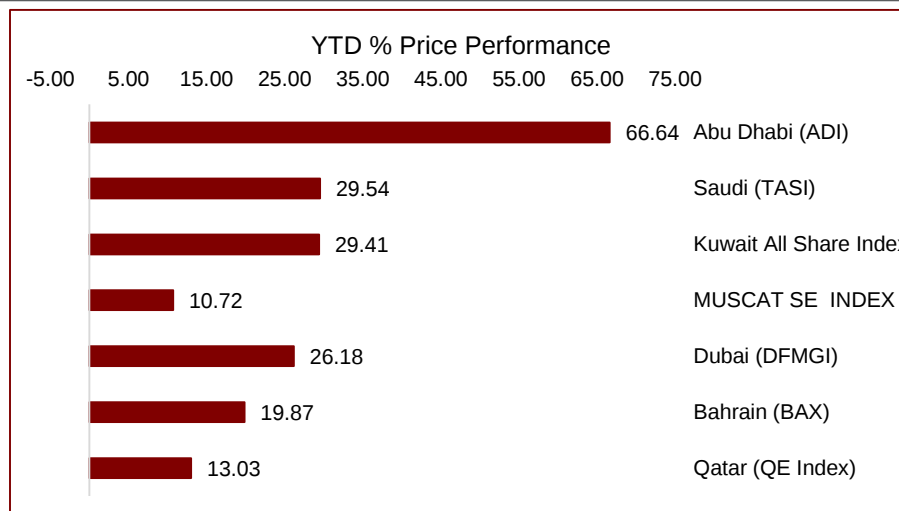
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.020	-0.49	-1.35	3.23	7.24	27.75	7.36 KWD	1.90	27.00
KFH	0.836	-0.71	-1.06	0.12	1.82	36.00	7.10 KWD	3.27	32.00
Zain	0.594	0.17	-0.50	-1.00	-1.00	-2.15	2.56 KWD	2.16	13.58
BOUBYAN BANK	0.798	-0.25	-2.32	1.78	4.04	47.70	2.54 KWD	3.63	34.00
Agility	1.016	0.00	-2.78	2.63	2.94	65.00	2.26 KWD	1.04	2.16
Saudi Arabia									
ARAMCO	35.80	0.99	-2.85	-5.67	-0.69	2.14	7,090.19 SAR	6.63	21.84
SABIC	119.60	-0.33	-4.31	-5.52	-5.97	18.15	360.01 SAR	2.07	35.00
STC	113.20	-0.53	-1.56	-1.56	-10.71	6.98	227.61 SAR	3.32	20.11
AL-RAJHI BANK	138.00	2.07	-5.11	-1.15	12.07	86.68	338.01 SAR	5.31	25.55
NCB	65.10	0.15	-6.68	-1.38	4.72	48.33	291.08 SAR	1.81	19.58
United Arab Emirates									
ETISALAT.AD	29.98	2.81	7.15	17.11	24.81	77.40	253.60 AED	5.50	27.48
FAB.AD	19.00	-0.52	-3.55	6.74	6.86	47.29	208.57 AED	1.91	17.16
EMIRATES NBD	13.40	-1.83	-5.63	-2.55	-5.63	30.10	86.22 AED	1.01	10.81
DB ISLAMIC BK	5.31	-1.85	-4.15	3.91	7.27	15.18	39.17 AED	1.03	14.43
EMAAR PROPERT	4.81	-2.04	-6.05	19.06	17.89	36.26	40.16 AED	0.62	12.74
Qatar									
QNB	20.65	0.00	-1.86	1.03	7.62	15.59	190.58 QAR	1.90	16.20
INDUSTRIES QAT	15.50	0.65	-2.22	-4.88	-0.26	41.77	93.10 QAR	2.49	13.98
QA ISLAMIC BK	18.14	-0.11	0.11	-0.16	-0.44	6.20	42.88 QAR	1.79	13.54
MASRAF AL RAYA	4.73	-1.52	-3.29	0.62	5.58	4.39	35.99 QAR	2.43	16.18
MESAIEED PETRO	2.23	-0.80	-3.55	1.36	-1.20	8.94	28.17 QAR	1.69	17.20
OMAN									
BANK MUSCAT	0.502	0.40	0.40	2.88	11.11	38.89	1.79 OMR	0.85	8.33
OMANTEL	0.736	-0.54	-0.54	-3.66	-0.54	1.66	0.56 OMR	0.99	7.69
BANK DHOFAR	0.132	-2.22	0.76	2.31	13.68	37.11	0.41 QAR	0.57	14.93
NAT BANK OF OMAN	0.194	0.00	2.65	0.00	4.86	21.25	0.32 QAR	0.57	12.71
OMINVEST	0.312	0.00	-0.64	0.65	-0.64	-7.69	0.25 QAR	0.91	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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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is down today by -0.35 %The leading sector bottom performance indices today are Technology -1.96 % Consumer Disc -1.85 % Basic materials -0.77 % respectively

Telecommunication sector are up today by + 0.18 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-29.86 %

KSA

Saudi Armco has a positive performance today by + 0.99 %, SABIC has a negative performance today by -0.33 %

STC has a negative performance today by -0.53 %, Al Rajhi Bank has a positive performance today by + 2.07 %

UAE

ETISALAT AD closed up today by + 2.81 %, and act defensively with COVID19



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