



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MORNING BRIEF

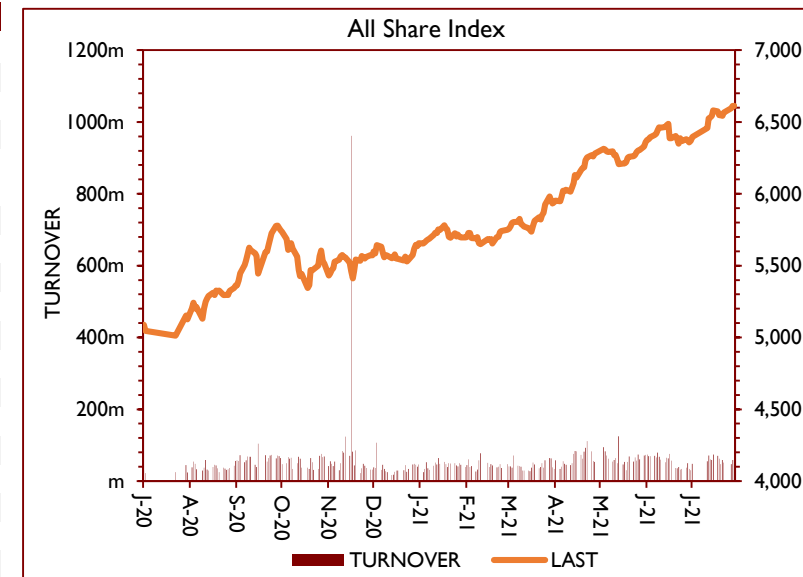
Monday, August 23, 2021



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,669.82	0.18	0.02	1.35	4.43	20.26	39.23 KWD	2.54	26.66
Kuwait Premier Index	7,289.22	0.24	-0.03	1.74	5.09	20.46	29.55 KWD	2.26	27.88
Kuwait Main Index	5,445.58	0.01	0.20	0.15	2.42	19.62	9.68 KWD	3.38	23.06
NIC 50	8,121.24	0.44	-0.08	1.66	5.02	20.46	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,528.95	0.31	-0.11	1.89	5.59	21.11	22.51 KWD	1.30	28.88
Telecom	1,095.96	-0.25	0.34	0.56	1.44	-0.58	3.37 KWD	0.73	13.91
Industrials	1,156.45	-0.14	0.12	-0.27	2.15	29.78	4.11 KWD	0.83	11.74
Financial services	1,253.68	0.46	0.78	3.03	8.40	34.85	3.12 KWD	0.79	9.85
Real estate	1,216.39	0.44	-0.10	0.59	2.66	27.69	2.61 KWD	0.68	27.85
Basic materials	1,078.94	0.51	0.24	0.17	-1.51	20.07	0.96 KWD	1.88	11.45
Health care	807.12	0.00	0.00	0.79	2.15	-2.36	0.40 KWD	3.72	31.58
Consumer services	744.43	-0.27	-0.09	-3.51	-5.07	-0.26	0.54 KWD	0.92	9.79
Insurance	1,377.25	-3.94	-2.16	-1.96	-0.60	19.12	0.60 KWD	0.83	9.29
Consumer Disc	1,034.30	-0.19	0.16	-0.10	6.14	26.35	0.23 KWD	1.33	9.27
Energy	1,346.80	-0.79	-2.46	-4.90	-5.84	5.44	0.28 KWD	0.98	14.43
Technology	734.78	0.00	-3.81	-2.88	-10.62	46.17	0.01 KWD	0.86	0.00
Utilities	613.16	0.00	4.02	2.64	2.19	-15.88	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)	11,062.99	-0.12	-0.71	1.00	1.26	28.00	9,713 SAR	2.64	19.81
Qatar (QE Index)	11,133.51	0.50	0.80	3.43	3.64	6.57	558 QAR	1.52	16.08
Dubai (DFMGI)	2,887.53	0.72	1.74	4.40	2.74	15.87	312 AED	1.52	19.94
Abu Dhabi (ADI)	7,683.98	0.06	0.84	5.00	12.41	52.30	1,354 AED	1.76	24.10
Bahrain (BAX)	1,641.70	-0.39	0.22	2.80	3.38	10.20	17 BHD	1.16	10.85
MUSCAT SE INDEX	3,960.21	-0.29	-0.57	-1.74	-2.54	8.24	5 OMR	0.91	13.25
Developed Markets									
MSCI World Index	3,080.02	0.55	0.00	0.35	2.08	14.50			
U.S. (S&P 500)	4,441.67	0.33	-0.59	1.06	3.35	18.25			
U.K. (FTSE 100)	7,120.35	0.46	0.46	1.25	1.18	10.22			
Japan (Topix)	1,915.14	1.83	1.83	0.74	-1.46	6.12			
Emerging Markets									
MSCI EM Index	1,220.78	-0.94	0.00	-4.46	-11.19	-5.46			
China (SSE Composite)	3,477.13	1.45	1.45	2.35	-3.18	0.12			
India (Sensex)	55,555.79	0.41	0.41	5.65	5.86	16.34			



What Move the GCC markets ,

Oil Prices

Oil prices rose on Tuesday after the U.S. drug regulator granted full approval to the Pfizer/BioNTech SE Covid-19 vaccine, stoking investor hopes that higher fuel demand will follow a potential step up in U.S. coronavirus vaccination rates, Brent crude oil futures gained 66 cents, or 0.9%, to \$69.41 a barrel.

Kuwait Market

The market closed up by + 0.18%, value traded 47.5 million KD, Premier market value traded reached 27.5 million KD and closed at 7,289 change by + 0.24%.

Saudi Market

The Market closed down today by - 0.12%, with positive macroeconomic sentiments bounce of oil +0.9% recouping some of the losses in the previous session when prices hit a three-week low.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



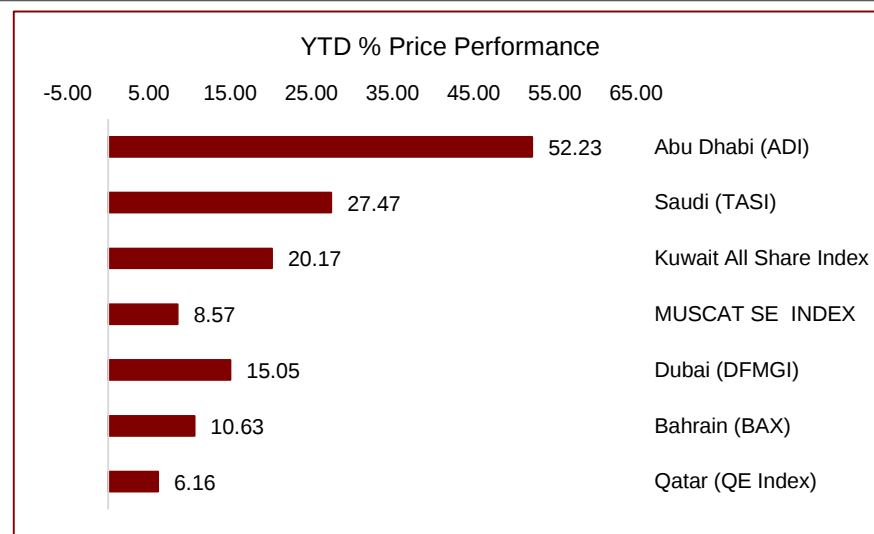
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.903	0.44	0.78	1.01	6.36	12.88	6.47 KWD	1.71	27.00
KFH	0.802	0.25	-0.37	2.17	5.67	30.31	6.76 KWD	3.19	32.00
Zain	0.600	-0.33	0.33	1.52	1.87	-0.99	2.61 KWD	2.25	13.91
BOUBAYAN BANK	0.785	0.38	-0.13	-2.37	6.69	44.38	2.49 KWD	3.59	34.00
Agility	0.990	-0.30	-0.60	0.41	7.84	61.09	2.22 KWD	1.79	27.71
Saudi Arabia									
ARAMCO	34.50	-1.15	-0.14	0.14	-0.57	-0.29	6,980.56 SAR	6.78	26.30
SABIC	120.20	-0.66	-0.82	-0.33	-0.99	18.93	363.03 SAR	2.14	35.00
STC	128.60	-2.43	-0.61	-2.69	-0.91	23.02	263.62 SAR	4.12	23.57
AL-RAJHI BANK	121.20	1.00	-0.65	9.37	9.37	64.95	300.02 SAR	5.03	24.02
NCB	59.30	1.19	0.00	7.27	2.43	36.10	262.43 SAR	1.65	16.19
United Arab Emirates									
ETISALAT.AD	24.30	-0.82	0.50	6.58	10.45	43.79	213.07 AED	4.52	23.15
FAB.AD	16.98	-0.12	0.95	2.41	1.68	31.63	185.64 AED	1.75	17.26
EMIRATES NBD	13.60	-0.37	0.74	1.49	2.64	32.04	86.22 AED	1.03	12.37
DB ISLAMIC BK	5.17	1.17	2.17	7.04	7.26	12.15	37.00 AED	1.00	15.48
EMAAR PROPERT	4.17	0.97	2.21	4.77	0.24	18.13	29.57 AED	0.53	13.62
Qatar									
QNB	19.13	-0.10	-0.26	5.11	6.57	7.29	175.40 QAR	1.83	15.54
INDUSTRIES QAT	13.20	0.08	0.84	-1.12	-0.38	21.44	79.13 QAR	2.26	15.87
QA ISLAMIC BK	18.43	1.10	2.22	7.03	6.59	7.71	42.72 QAR	1.87	14.22
MASRAF AL RAYA	4.52	1.03	0.78	4.63	1.37	-0.22	33.27 QAR	2.36	15.01
MESAIEED PETRO	1.99	2.48	1.96	3.24	4.89	-3.57	24.16 QAR	1.51	18.64
OMAN									
BANK MUSCAT	0.440	0.00	0.00	-1.79	3.77	22.22	1.57 OMR	0.77	8.33
OMANTEL	0.768	0.00	-2.04	-3.03	-3.52	6.08	0.57 OMR	1.04	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	0.185	-0.54	-1.60	0.00	-7.50	15.63	0.30 QAR	0.55	12.71
OMINVEST	0.314	0.00	0.00	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
11-Aug-21	20.22%	11.87%	0.06%	0.38%	0.37%	4.68%	2.55%	10.69%	5.09%	4.14%
18-Aug-21	20.23%	11.54%	0.06%	0.38%	0.36%	4.72%	2.59%	10.74%	5.12%	4.15%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is up today by + 0.18 %The leading sector best performance indices today are Financial services 0.46 % Real estate 0.44 % Banking 0.31 % 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 down today by -0.25 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -20.84 %

KSA

Saudi Armco has negative performance today by - 1.15 %, SABIC has a negative performance today by -0.66 %

STC have negative performance today by -2.43 %, Al Rajhi Bank has a positive performance today by + 1.0 %

UAE

ETISALAT AD closed down today by - 0.82%, and act defensively with COVID19



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