



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, October 24, 2021

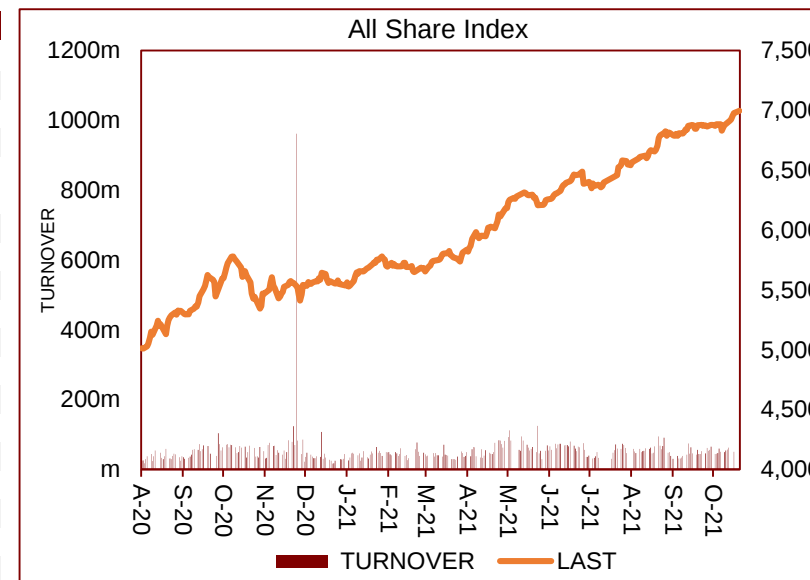




Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,995.25	0.27	1.61	1.93	1.93	26.17	41.07 KWD	2.89	25.42
Kuwait Premier Index	7,559.01	0.29	1.29	0.82	0.82	24.90	30.57 KWD	2.32	26.37
Kuwait Main Index	5,911.68	0.20	0.35	5.38	5.38	30.06	10.50 KWD	4.55	22.86
NIC 50	8,434.10	0.38	1.24	0.74	0.75	24.90	28.60 KWD	2.30	25.37
Kuwait Sector									
Banking	1,592.16	0.27	0.27	1.01	1.01	26.12	23.42 KWD	1.30	27.37
Telecom	1,109.80	0.28	0.28	1.29	1.29	0.68	3.39 KWD	0.79	13.15
Industrials	1,191.07	0.55	0.55	2.05	2.05	33.66	4.20 KWD	0.92	12.74
Financial services	1,398.19	0.48	0.48	6.01	6.01	50.39	3.46 KWD	0.87	11.98
Real estate	1,329.87	-0.15	-0.15	3.94	3.94	39.60	2.87 KWD	0.79	29.19
Basic materials	1,096.12	-0.26	-0.26	0.68	0.68	21.98	0.98 KWD	1.93	12.33
Health care	793.64	-0.15	-0.15	-0.28	-0.28	-3.99	0.39 KWD	4.55	13.23
Consumer services	781.41	-0.58	-0.58	-0.27	-0.27	4.70	0.63 KWD	1.11	10.98
Insurance	1,470.40	0.32	0.32	1.40	1.40	27.18	0.61 KWD	0.83	10.00
Consumer Disc	1,218.59	-0.14	-0.14	9.08	9.08	48.86	0.24 KWD	1.40	9.75
Energy	1,434.23	0.70	0.70	4.17	4.17	12.28	0.30 KWD	1.08	14.32
Technology	734.78	0.00	0.00	2.85	2.85	46.17	0.01 KWD	0.86	0.00
Utilities	621.05	0.00	0.43	-0.42	-0.42	-14.80	0.26 KWD	4.92	20.33

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,848.05	-0.77	-0.50	3.34	3.34	36.35	10,502 SAR	2.73	20.24
Qatar (QE Index)	11,820.72	-0.43	1.43	3.01	3.01	13.27	597 QAR	1.78	16.84
Dubai (DFMGI)	2,880.61	0.82	3.27	1.23	1.23	15.60	313 AED	1.61	19.69
Abu Dhabi (ADI)	7,949.44	0.93	1.76	3.26	3.26	57.56	1,373 AED	1.86	24.28
Bahrain (BAX)	1,736.38	0.71	1.62	1.81	1.81	16.55	18 BHD	1.17	11.16
MUSCAT SE INDEX	3,991.12	0.16	0.92	1.27	1.27	9.08	5 OMR	0.91	13.25
Developed Markets									
MSCI World Index	3,151.16	-0.04	1.34	4.81	4.81	17.14			
U.S. (S&P 500)	4,544.90	0.33	1.64	5.51	5.51	21.00			
U.K. (FTSE 100)	7,204.55	0.20	-0.41	1.67	1.67	11.52			
Japan (Topix)	2,002.23	0.07	-1.07	-1.38	-1.38	10.95			
Emerging Markets									
MSCI EM Index	1,293.14	0.01	0.74	3.20	3.20	0.15			
China (SSE Composite)	3,582.60	-0.34	0.29	0.40	0.40	3.15			
India (Sensex)	60,821.62	-0.17	-0.79	2.87	2.87	27.37			



What Move the GCC markets ,

Oil Prices

Oil prices resumed their climb on Friday on continued tightness in U.S. supply, but were headed for a flat finish on the week as coal and gas prices eased, curbing fuel-switching which had stoked demand for oil products for power, Brent crude futures climbed 92 cents, or 1.09%, to settle at \$85.53 per barrel.

Kuwait Market

The market closed today up by +0.27%, value traded 57.0 million KD, Premier market value traded reached 30.9 million KD and closed at 7,559.01 up by +0.29% .

Saudi Market

The Market closed down today by - 0.77%, with positive macroeconomic sentiments bounce of oil reaching \$85.53 or +1.09%.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



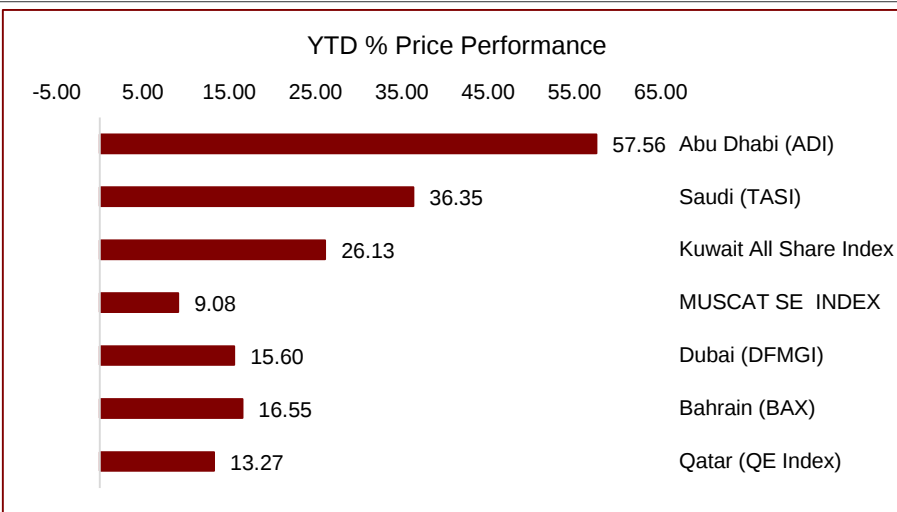
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	0.953	-0.10	0.74	0.10	0.10	19.25	6.86 KWD	1.77	27.00
KFH	0.825	0.24	2.23	0.37	0.37	34.05	6.95 KWD	3.28	32.00
Zain	0.602	0.33	0.50	0.50	0.50	-0.66	2.60 KWD	2.24	13.86
BOUBAYAN BANK	0.772	0.26	0.13	0.52	0.52	42.71	2.45 KWD	3.49	34.00
Agility	0.972	-0.21	-0.31	-1.22	-1.22	58.33	2.17 KWD	1.75	27.18
Saudi Arabia									
ARAMCO	37.40	-0.13	0.40	4.03	4.03	7.00	7,490.00 SAR	7.27	28.03
SABIC	134.80	0.45	0.75	5.65	5.65	32.74	402.60 SAR	2.38	35.00
STC	119.40	1.02	2.38	-5.20	-5.20	13.58	236.40 SAR	3.69	21.01
AL-RAJHI BANK	137.80	-2.96	3.27	13.21	13.21	88.59	355.00 SAR	5.95	27.75
NCB	65.40	-0.30	1.71	6.68	6.68	51.10	293.76 SAR	1.82	17.91
United Arab Emirates									
ETISALAT.AD	25.66	0.71	3.22	6.83	6.83	51.83	221.58 AED	4.70	24.07
FAB.AD	18.36	2.11	2.68	3.26	3.26	42.33	196.33 AED	1.85	18.25
EMIRATES NBD	13.90	0.72	1.46	-2.11	-2.11	34.95	87.17 AED	1.04	10.92
DB ISLAMIC BK	5.10	0.39	2.82	3.03	3.03	10.63	36.78 AED	0.99	15.39
EMAAR PROPERT	4.05	1.00	3.32	-0.74	-0.74	14.73	28.71 AED	0.51	13.23
Qatar									
QNB	20.02	-0.89	0.91	4.54	4.54	12.28	186.24 QAR	1.86	15.84
INDUSTRIES QAT	15.77	-2.41	0.25	2.46	2.46	45.63	97.59 QAR	2.77	19.44
QA ISLAMIC BK	18.28	0.05	1.11	0.22	0.22	6.90	43.09 QAR	1.80	13.62
MASRAF AL RAYA	4.80	-0.50	4.80	7.17	7.17	5.96	36.11 QAR	2.44	16.25
MESAIEED PETRO	2.38	-0.79	-0.83	5.89	5.89	16.76	30.10 QAR	1.87	23.08
OMAN									
BANK MUSCAT	0.488	1.67	5.17	8.44	8.44	35.56	1.72 OMR	0.84	8.33
OMANTEL	0.740	0.00	0.00	0.00	0.00	2.21	0.56 OMR	1.01	7.69
BANK DHOFAR	0.123	0.00	-0.81	5.13	5.13	26.80	0.37 QAR	0.53	14.93
NAT BANK OF OMAN	0.193	0.00	1.58	4.32	4.32	20.63	0.31 QAR	0.58	12.71
OMINVEST	0.314	0.64	0.64	0.00	0.00	-7.10	0.25 QAR	0.93	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
13-Oct-21	20.85%	10.13%	0.06%	0.38%	0.40%	4.63%	2.60%	10.96%	5.25%	4.16%
20-Oct-21	20.83%	10.35%	0.06%	0.37%	0.40%	4.67%	2.64%	10.90%	5.26%	4.14%

End of Report

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Leading Sector Performance

The market is up today by + 0.27 % The leading sector best performance indices today are Industrials 0.55 % Financial services 0.48 % Insurance 0.32 % respectively

Telecommunication sector are up today by + 0.28 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -25.49 %

KSA

Saudi Armco has negative performance today by – 0.13 %, SABIC have positive performance today by + 0.45 %

STC has a positive performance today by + 1.02 %, Al Rajhi Bank has negative performance today by -2.96 %

UAE

ETISALAT AD closed up today by + 0.71%, and act defensively with COVID19



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