



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

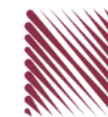
GCC DAILY MORNING BRIEF

Wednesday, November 24, 2021



DAILY MARKETS WRAP,

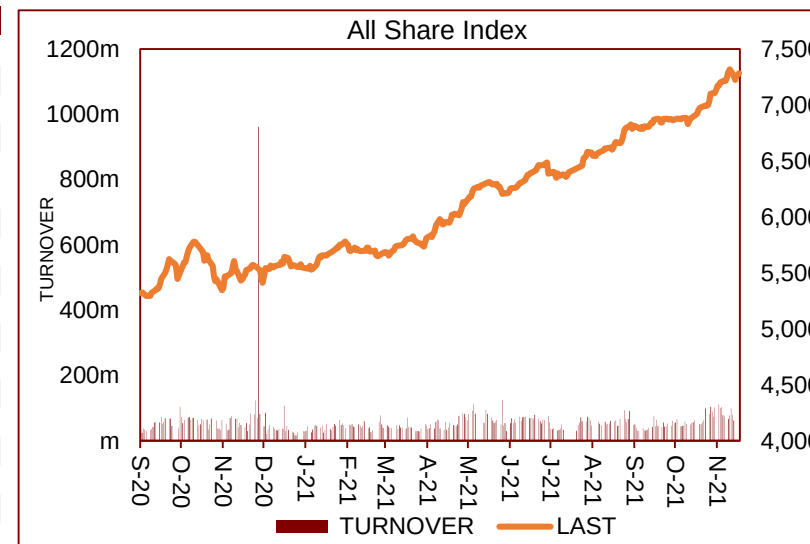
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Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,140.47	-0.51	-1.90	0.52	4.08	28.83	42.42 KWD	2.09	26.34
Kuwait Premier Index	7,734.78	-0.51	-1.88	0.55	3.18	27.83	31.71 KWD	2.25	26.82
Kuwait Main Index	5,990.54	-0.51	-2.16	0.26	6.68	31.66	10.71 KWD	1.59	25.02
NIC 50	8,852.99	0.44	-1.93	0.47	3.11	27.83	28.60 KWD	2.23	25.82
Kuwait Sector									
Banking	1,634.68	-0.33	-1.73	0.91	3.71	29.48	24.36 KWD	1.24	27.82
Telecom	1,092.65	-0.43	-0.65	-0.95	-0.27	-0.88	3.35 KWD	0.90	13.60
Industrials	1,198.62	-0.87	-2.97	-0.37	2.70	34.51	4.25 KWD	1.01	14.71
Financial services	1,437.77	-0.61	-1.92	-0.04	9.01	54.65	3.72 KWD	0.91	11.29
Real estate	1,364.40	-1.27	-3.69	-0.35	6.64	43.22	2.94 KWD	0.80	57.07
Basic materials	1,065.17	-1.62	-2.94	-3.13	-2.16	18.54	0.95 KWD	1.83	28.98
Health care	797.98	-0.11	0.76	0.39	0.26	-3.47	0.40 KWD	4.58	12.15
Consumer services	750.30	-0.14	-1.17	-3.31	-4.24	0.53	0.69 KWD	0.90	16.05
Insurance	1,556.48	-2.07	-4.89	5.35	7.34	34.62	0.65 KWD	0.86	8.37
Consumer Disc	1,339.14	0.84	-2.19	5.95	19.87	63.59	0.23 KWD	1.38	9.15
Energy	1,452.45	0.45	-0.29	-0.44	5.49	13.71	0.30 KWD	1.07	16.39
Technology	727.50	0.00	-5.66	-5.66	1.83	44.72	0.01 KWD	0.86	0.00
Utilities	626.32	0.00	-0.42	0.85	0.42	-14.08	0.26 KWD	4.22	20.22

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,369.38	1.00	-3.15	-3.09	-1.34	30.84	9,990 SAR	2.49	18.23
Qatar (QE Index)	11,790.01	-0.05	-1.26	0.30	2.74	12.97	594 QAR	1.69	16.07
Dubai (DFMGI)	3,156.85	0.40	-3.32	10.22	10.94	26.68	314 AED	1.54	23.39
Abu Dhabi (ADI)	8,398.31	-0.11	0.59	6.78	9.09	66.46	1,436 AED	1.84	23.23
Bahrain (BAX)	1,792.07	0.35	0.05	2.81	5.07	20.29	18 BHD	1.57	9.89
MUSCAT SE INDEX	4,106.62	1.37	1.05	0.78	4.16	12.24	5 OMR	0.87	13.25
Developed Markets									
MSCI World Index	3,198.12	0.04	-0.71	0.70	6.33	18.84			
U.S. (S&P 500)	4,701.46	0.23	-0.15	1.85	8.90	24.88			
U.K. (FTSE 100)	7,286.32	0.27	0.55	0.36	2.50	12.43			
Japan (Topix)	2,019.12	-1.16	-1.24	0.90	-0.54	11.88			
Emerging Markets									
MSCI EM Index	1,253.15	-0.18	-1.09	-0.74	0.18	-2.78			
China (SSE Composite)	3,592.70	0.10	0.91	1.28	0.69	3.44			
India (Sensex)	58,340.99	-0.55	-2.46	-1.92	-1.62	21.82			



What Move the GCC markets ,

Oil Prices

President Joe Biden said Wednesday that the administration will tap the Strategic Petroleum Reserve as part of a global effort by energy-consuming nations to calm 2021's rapid rise in fuel prices, International benchmark Brent crude stood at \$82.25 per barrel.

Kuwait Market

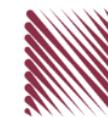
The market closed today down by - 0.51%, value traded 52.6 million KD, Premier market value traded reached 32.3 million KD and closed at 7,734.78 down by - 0.51%.

Saudi Market

The Market closed up by + 1.0%, with positive macroeconomic sentiments bounce of oil reaching \$82.25.

DAILY MARKETS WRAP,

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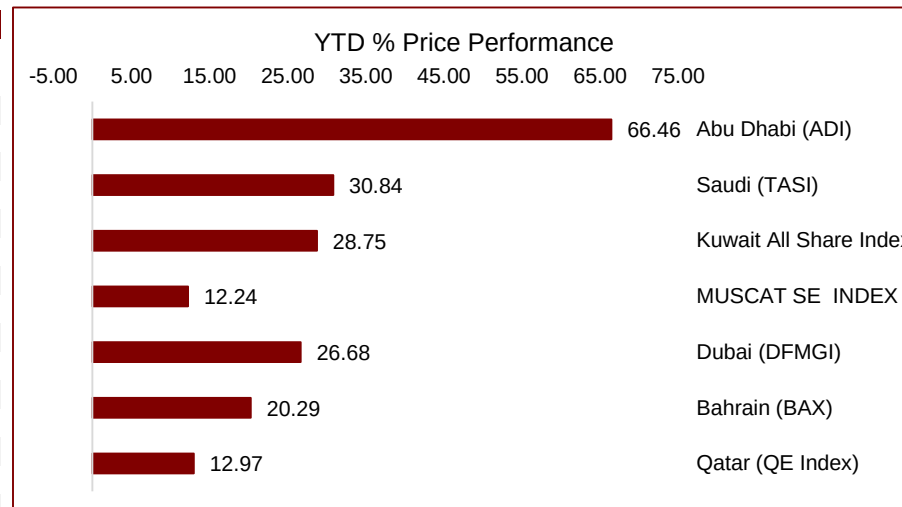
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.018	-0.20	-1.74	2.83	6.82	27.25	7.32 KWD	1.89	27.00
KFH	0.835	-0.12	-1.18	0.00	1.70	35.83	7.05 KWD	3.24	32.00
Zain	0.591	-0.51	-0.84	-1.34	-1.34	-2.48	2.56 KWD	2.15	13.60
BOUBYAN BANK	0.796	-0.25	-2.69	1.40	3.65	47.15	2.53 KWD	3.61	34.00
Agility	1.000	-1.57	-3.93	1.42	1.73	63.05	2.23 KWD	1.02	2.16
Saudi Arabia									
ARAMCO	36.00	0.56	-1.77	-4.62	0.42	3.29	7,160.38 SAR	6.70	21.45
SABIC	120.00	0.33	-4.15	-5.36	-5.81	18.34	358.82 SAR	2.06	35.00
STC	114.00	0.71	-1.74	-1.74	-10.87	6.79	226.41 SAR	3.30	20.15
AL-RAJHI BANK	142.00	2.90	-2.21	1.87	15.50	92.39	345.02 SAR	5.42	24.40
NCB	65.20	0.15	-5.52	-0.15	6.03	50.17	291.53 SAR	1.81	18.85
United Arab Emirates									
ETISALAT.AD	30.00	0.07	7.22	17.19	24.90	77.51	260.74 AED	5.66	28.25
FAB.AD	19.00	0.00	-3.55	6.74	6.86	47.29	207.49 AED	1.90	17.07
EMIRATES NBD	13.30	-0.75	-6.34	-3.27	-6.34	29.13	84.64 AED	0.99	10.61
DB ISLAMIC BK	5.31	0.00	-4.15	3.91	7.27	15.18	38.45 AED	1.01	14.16
EMAAR PROPERT	4.86	1.04	-5.08	20.30	19.12	37.68	39.35 AED	0.60	12.48
Qatar									
QNB	20.60	-0.24	-1.90	0.98	7.57	15.54	190.27 QAR	1.90	16.20
INDUSTRIES QAT	15.41	-0.58	-2.22	-4.88	-0.26	41.77	93.23 QAR	2.49	14.08
QA ISLAMIC BK	18.14	0.00	-0.06	-0.33	-0.60	6.02	42.86 QAR	1.79	13.53
MASRAF AL RAYA	4.75	0.42	-2.86	1.06	6.05	4.86	35.63 QAR	2.40	15.93
MESAIEED PETRO	2.23	0.09	-3.63	1.27	-1.28	8.84	27.99 QAR	1.68	17.06
OMAN									
BANK MUSCAT	0.504	0.80	1.61	4.12	12.44	40.56	1.79 OMR	0.85	8.33
OMANTEL	0.736	0.00	-0.54	-3.66	-0.54	1.66	0.55 OMR	0.98	7.69
BANK DHOFAR	0.135	1.50	0.76	2.31	13.68	37.11	0.40 QAR	0.56	14.93
NAT BANK OF OMAN	0.192	-1.03	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
17-Nov-21	20.92%	11.68%	0.06%	0.29%	0.41%	4.63%	2.76%	10.64%	5.28%	4.33%
24-Nov-21	20.96%	11.72%	0.06%	0.30%	0.42%	4.61%	2.76%	10.61%	5.30%	4.36%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is down today by -0.51 % The leading sector bottom performance indices today are Insurance -2.07 % Basic materials -1.62 % Real estate -1.27 % respectively

Telecommunication sector are down today by -0.43 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -29.71 %

KSA

Saudi Armco has a positive performance today by + 0.56 %, SABIC has a positive performance today by + 0.33 %

STC has a positive performance today by + 0.71 %, Al Rajhi Bank has a positive performance today by + 2.90 %

UAE

ETISALAT AD closed up today by + 0.07 %, and act defensively with COVID19



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