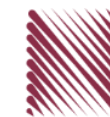


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MORNING BRIEF

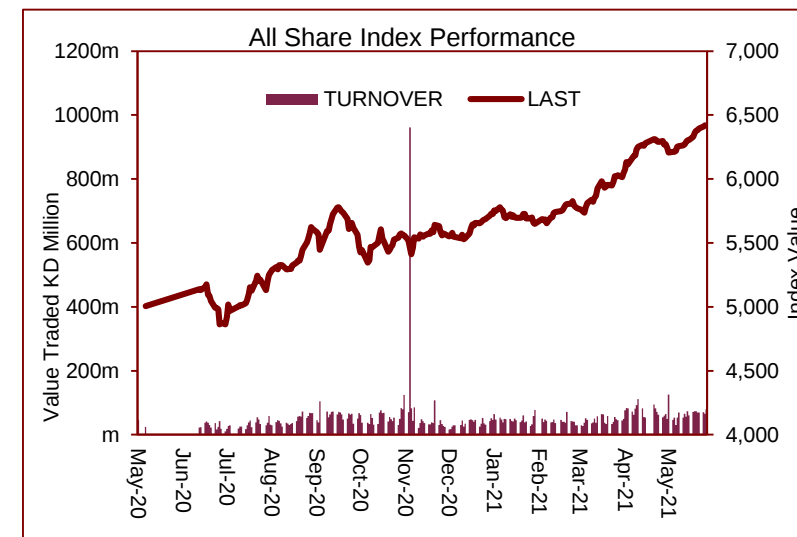
Thursday, June 24, 2021



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,459.66	-0.06	1.14	4.11	11.95	16.59	37.97 KWD	2.13	34.93
Kuwait Premier Index	7,016.40	-0.03	1.14	4.25	11.10	16.12	28.45 KWD	2.29	36.42
Kuwait Main Index	5,374.80	-0.16	1.15	3.69	14.64	18.03	9.52 KWD	1.63	30.67
NIC 50	7,825.13	0.00	1.09	4.18	11.03	16.12	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,461.17	0.23	1.17	5.20	11.18	15.74	21.49 KWD	1.38	37.42
Telecom	1,076.17	-0.17	-0.61	-1.24	-3.45	-2.37	3.30 KWD	0.63	13.95
Industrials	1,156.31	-0.80	1.88	2.69	25.57	29.76	4.13 KWD	0.83	14.50
Financial services	1,175.38	-0.36	1.86	3.69	19.34	26.42	3.06 KWD	0.78	10.65
Real estate	1,216.47	-1.04	0.72	4.91	19.64	27.70	2.64 KWD	0.74	44.95
Basic materials	1,129.86	-0.48	-0.87	2.24	3.75	25.74	1.01 KWD	2.02	12.67
Health care	786.56	0.00	-0.07	-0.50	-2.92	-4.85	0.39 KWD	4.14	38.42
Consumer services	792.40	-0.21	-1.40	0.97	11.96	6.17	0.51 KWD	0.88	9.69
Insurance	1,349.65	1.60	4.94	8.16	12.37	16.73	0.51 KWD	0.88	9.37
Consumer Disc	994.34	0.55	1.36	4.84	17.60	21.47	0.24 KWD	1.36	8.92
Energy	1,482.09	-1.05	-1.93	5.84	20.96	16.03	0.31 KWD	1.11	14.72
Technology	851.18	4.46	-0.85	36.37	42.68	69.32	0.01 KWD	0.94	0.00
Utilities	613.16	0.00	-1.69	-2.92	-13.06	-15.88	0.26 KWD	3.66	20.82

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,919.68	0.23	0.52	3.40	10.11	25.55	9,717 SAR	2.79	22.23
Qatar (QE Index)	10,761.35	-0.05	0.21	0.17	3.51	3.17	550 QAR	1.57	20.20
Dubai (DFMGI)	2,857.07	-0.38	-0.20	2.13	12.03	14.65	316 AED	1.43	11.87
Abu Dhabi (ADI)	6,576.05	-1.01	-1.06	0.26	11.22	30.34	942 AED	1.77	12.50
Bahrain (BAX)	1,579.15	0.02	1.07	3.37	8.31	6.00	17 BHD	1.21	23.09
MUSCAT SE INDEX	4,046.88	-0.02	-0.78	5.03	9.10	10.59	5 OMR	0.89	13.25
Developed Markets									
MSCI World Index	3,013.36	0.51	1.48	0.75	6.63	11.45			
U.S. (S&P 500)	4,266.49	0.58	1.81	0.90	6.77	12.93			
U.K. (FTSE 100)	7,109.97	0.51	1.33	1.25	5.91	10.06			
Japan (Topix)	1,947.10	-0.10	0.03	1.25	-0.35	7.89			
Emerging Markets									
MSCI EM Index	1,367.39	0.51	-0.06	-1.14	3.35	5.36			
China (SSE Composite)	3,566.65	0.01	1.18	-1.35	3.62	2.69			
India (Sensex)	52,699.00	0.75	0.67	1.46	6.43	10.35			



What Move the GCC markets ,

Oil Prices

Oil prices dipped modestly on Thursday but still held close to their highest in almost three years, supported by drawdowns in U.S. inventories and accelerating German economic activity, Brent dipped 18 cents, or 0.24%, to \$75.01 a barrel.

Kuwait Market

The market closed today down by 0.06%, value traded 60.0 million KD, Premier market value traded reached 31.0 million KD and closed at 7,016 change by 0.03 %.

Saudi Market

The Market closed up today by 0.23%, today market Performance is linked to oil prices raised to \$75.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



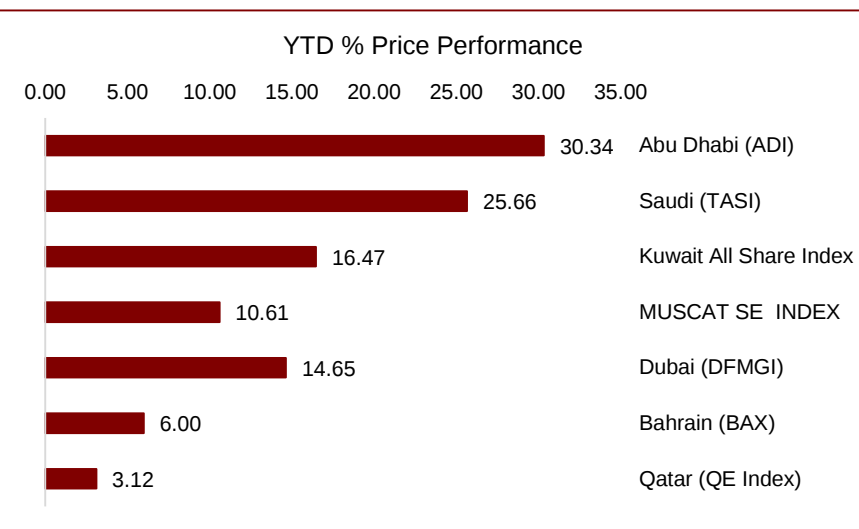
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.859	1.06	1.90	3.49	6.44	7.38	6.10 KWD	1.58	27.00
KFH	0.775	-0.13	0.52	4.16	11.15	26.09	6.54 KWD	3.48	32.00
Zain	0.586	-0.17	-0.51	-1.34	-2.98	-3.14	2.53 KWD	2.27	13.95
BOUBYAN BANK	0.730	0.55	2.95	9.09	27.04	35.32	2.30 KWD	3.79	34.00
Agility	0.951	-1.14	4.23	4.68	45.76	56.54	2.14 KWD	1.75	47.75
Saudi Arabia									
ARAMCO	35.15	-0.14	-0.28	-0.42	-2.36	0.43	7,040.19 SAR	6.96	35.27
SABIC	120.80	-0.17	-0.82	-2.42	3.24	19.53	363.01 SAR	2.12	35.00
STC	131.00	0.46	0.31	4.98	3.15	23.40	260.81 SAR	4.00	24.07
AL-RAJHI BANK	110.60	0.91	0.36	6.98	11.74	50.00	274.01 SAR	4.63	23.81
NCB	57.20	0.35	4.40	7.34	7.34	31.49	255.25 SAR	2.05	14.70
United Arab Emirates									
ETISALAT.AD	22.20	0.45	0.09	2.49	2.59	31.36	192.20 AED	4.30	20.90
FAB.AD	16.26	-2.05	-1.81	-3.56	11.37	26.05	181.27 AED	1.76	17.63
EMIRATES NBD	13.80	-0.36	-1.43	0.00	20.00	33.98	87.48 AED	1.06	13.37
DB ISLAMIC BK	4.87	-0.41	-1.42	2.10	7.03	5.64	35.41 AED	0.98	14.30
EMAAR PROPERT	4.23	0.00	2.92	7.09	19.49	19.83	30.29 AED	0.54	12.29
Qatar									
QNB	18.08	-0.11	1.12	1.69	0.06	0.95	167.18 QAR	1.81	15.56
INDUSTRIES QAT	13.21	0.46	-0.68	2.32	10.54	21.53	79.56 QAR	2.39	24.59
QA ISLAMIC BK	17.13	0.12	0.65	-0.81	4.25	0.29	40.43 QAR	1.83	13.83
MASRAF AL RAYA	4.45	-0.11	-0.07	0.13	3.87	-1.63	33.41 QAR	2.44	15.16
MESAIEED PETRO	1.90	0.00	0.96	0.96	2.26	-7.08	23.90 QAR	1.53	27.97
OMAN									
BANK MUSCAT	0.420	1.45	-0.47	8.21	9.90	17.22	1.48 OMR	0.74	8.33
OMANTEL	0.784	-0.51	-2.00	-0.51	-0.51	8.29	0.59 OMR	1.11	7.69
BANK DHOFAR	0.126	2.44	0.00	9.65	17.92	28.87	0.37 QAR	0.52	14.93
NAT BANK OF OMAN	0.198	0.00	0.00	18.56	32.00	23.75	0.32 QAR	0.60	12.71
OMINVEST	0.318	-1.89	0.00	-0.62	-0.62	-5.92	0.26 QAR	0.99	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
16-Jun-21	19.92%	12.77%	0.06%	0.43%	0.32%	4.89%	2.59%	10.50%	5.06%	4.11%
23-Jun-21	19.94%	12.60%	0.06%	0.42%	0.33%	4.83%	2.58%	10.55%	5.09%	4.10%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is down today by -0.06 % The leading sector bottom performance indices today are Energy -1.05 % Real estate -1.04 % Industrials -0.8 % respectively

from YTD performance perspective the best sector performance is Industrials by 29.76 % while the bottom sector performance is Utilities by -15.88 %

Telecommunication sector are down today by -0.17 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -18.96 %

KSA

Saudi Armco have negative performance today by -0.14 %, SABIC has negative performance today -0.17 %

STC has a positive performance today by + 0.46 %, Al Rajhi Bank has a positive performance today by + 0.91 %

UAE

ETISALAT AD closed up today by 0.45% , and act defensively with COVID19



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