



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

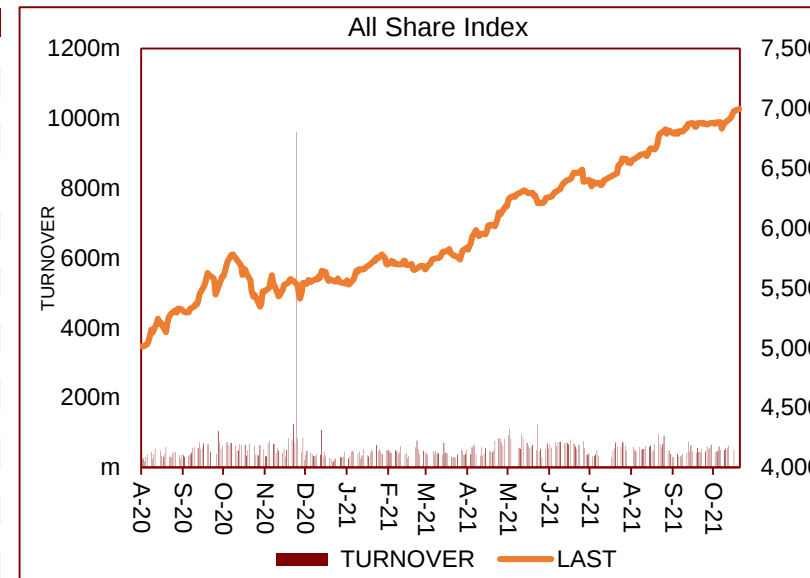
Monday, October 25, 2021





Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,992.90	-0.03	0.15	1.78	1.78	25.99	41.18 KWD	2.88	25.47
Kuwait Premier Index	7,558.06	-0.01	0.13	0.67	0.67	24.72	30.66 KWD	2.31	26.43
Kuwait Main Index	5,906.01	-0.10	0.22	5.23	5.23	29.88	10.52 KWD	4.55	22.89
NIC 50	8,428.57	-0.07	0.08	0.60	0.60	24.72	28.60 KWD	2.29	25.43
Kuwait Sector									
Banking	1,591.73	-0.03	0.24	0.98	0.98	26.08	23.49 KWD	1.30	27.43
Telecom	1,100.72	-0.82	-0.54	0.47	0.47	-0.14	3.40 KWD	0.79	13.19
Industrials	1,192.05	0.08	0.63	2.14	2.14	33.77	4.21 KWD	0.94	13.07
Financial services	1,395.43	-0.20	0.28	5.80	5.80	50.09	3.48 KWD	0.89	12.19
Real estate	1,344.20	1.08	0.92	5.06	5.06	41.10	2.87 KWD	0.78	28.98
Basic materials	1,095.03	-0.10	-0.36	0.58	0.58	21.86	0.98 KWD	1.92	12.30
Health care	788.80	-0.61	-0.76	-0.89	-0.89	-4.58	0.39 KWD	4.55	13.13
Consumer services	778.04	-0.43	-1.01	-0.70	-0.70	4.24	0.63 KWD	1.11	10.96
Insurance	1,473.07	0.18	0.50	1.59	1.59	27.41	0.61 KWD	0.82	10.00
Consumer Disc	1,217.28	-0.11	-0.25	8.96	8.96	48.70	0.24 KWD	1.38	9.76
Energy	1,433.85	-0.03	0.68	4.14	4.14	12.25	0.30 KWD	1.09	14.36
Technology	705.68	-3.96	-3.96	-1.22	-1.22	40.38	0.01 KWD	0.86	0.00
Utilities	618.42	0.00	0.00	-0.84	-0.84	-15.16	0.26 KWD	4.94	20.42



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,889.84	0.35	-0.57	3.27	3.27	36.83	10,476 SAR	2.74	20.07
Qatar (QE Index)	11,834.18	0.11	-0.31	3.04	3.04	13.40	595 QAR	1.78	16.88
Dubai (DFMGI)	2,865.67	-0.52	0.29	0.71	0.71	15.00	314 AED	1.61	19.88
Abu Dhabi (ADI)	7,933.87	-0.20	0.73	3.05	3.05	57.25	1,383 AED	1.88	24.32
Bahrain (BAX)	1,739.19	0.16	0.88	1.97	1.97	16.74	18 BHD	1.17	11.20
MUSCAT SE INDEX	4,011.69	0.52	0.68	1.76	1.76	9.65	5 OMR	0.91	13.25
Developed Markets									
MSCI World Index	3,151.16	-0.04	0.00	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)	7,233.27	0.40	0.40	2.07	2.07	11.96			
Japan (Topix)	1,995.42	-0.34	-0.34	-1.71	-1.71	10.57			
Emerging Markets									
MSCI EM Index	1,293.14	0.01	0.00	3.20	3.20	0.15			
China (SSE Composite)	3,609.86	0.76	0.76	1.17	1.17	3.94			
India (Sensex)	60,967.05	0.24	0.29	3.16	3.16	27.74			

What Move the GCC markets ,

Oil Prices

Oil prices rose on Monday, extending pre-weekend gains, with U.S. crude hitting a seven-year high as global supply remained tight amid strong demand worldwide as economies recover from coronavirus pandemic-induced slumps, Brent crude futures climbed 61 cents, or 0.7%, to \$86.14 per barrel.

Kuwait Market

The market closed today down by - 0.03%, value traded 62.8 million KD, Premier market value traded reached 28.1 million KD and closed at 7,558.06 down by - 0.01%.

Saudi Market

The Market closed up today by + 0.35%, with positive macroeconomic sentiments bounce of oil reaching \$86.14 or +0.7%.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



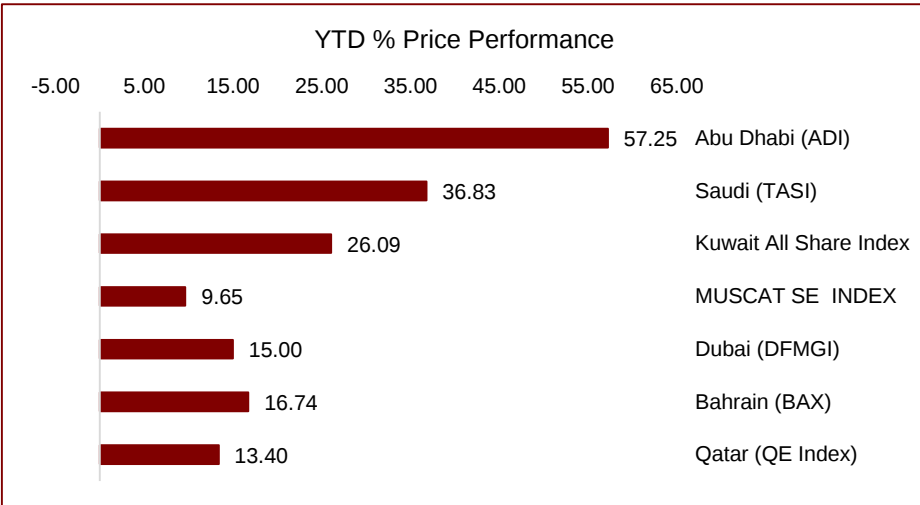
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.955	0.21	-0.21	-0.10	-0.10	19.00	6.85 KWD	1.77	27.00
KFH	0.826	0.12	0.24	0.37	0.37	34.05	6.96 KWD	3.20	32.00
Zain	0.597	-0.83	-0.50	-0.33	-0.33	-1.49	2.60 KWD	2.25	13.91
BOUBYAN BANK	0.774	0.26	0.39	0.65	0.65	42.90	2.45 KWD	3.50	34.00
Agility	0.972	0.00	-0.21	-1.32	-1.32	58.17	2.17 KWD	1.75	27.13
Saudi Arabia									
ARAMCO	37.45	0.13	0.00	4.03	4.03	7.00	7,480.00 SAR	7.26	28.19
SABIC	135.20	0.30	1.19	6.59	6.59	33.93	404.40 SAR	2.39	35.00
STC	119.20	-0.17	0.85	-6.14	-6.14	12.45	238.80 SAR	3.73	20.94
AL-RAJHI BANK	140.00	1.60	-2.25	13.21	13.21	88.59	344.50 SAR	5.77	27.91
NCB	65.10	-0.46	-0.15	6.68	6.68	51.10	292.86 SAR	1.82	18.00
United Arab Emirates									
ETISALAT.AD	25.56	-0.39	0.31	6.41	6.41	51.24	223.16 AED	4.73	24.24
FAB.AD	18.26	-0.54	1.56	2.70	2.70	41.55	200.49 AED	1.89	18.64
EMIRATES NBD	13.70	-1.44	-0.72	-3.52	-3.52	33.01	87.80 AED	1.03	11.00
DB ISLAMIC BK	5.10	0.00	0.39	3.03	3.03	10.63	36.93 AED	1.00	15.45
EMAAR PROPERT	4.05	0.00	1.00	-0.74	-0.74	14.73	29.00 AED	0.52	13.36
Qatar									
QNB	20.00	-0.10	-0.99	4.44	4.44	12.17	184.91 QAR	1.85	15.70
INDUSTRIES QAT	16.10	2.09	-0.37	4.21	4.21	48.11	95.41 QAR	2.70	18.97
QA ISLAMIC BK	18.17	-0.60	-0.11	0.00	0.00	6.66	43.19 QAR	1.81	13.63
MASRAF AL RAYA	4.77	-0.63	-0.81	6.83	6.83	5.63	36.00 QAR	2.43	16.17
MESAIEED PETRO	2.38	-0.04	0.25	6.60	6.60	17.54	29.91 QAR	1.85	22.89
OMAN									
BANK MUSCAT	0.476	-2.06	1.25	8.00	8.00	35.00	1.73 OMR	0.85	8.33
OMANTEL	0.736	-0.54	-0.54	-0.54	-0.54	1.66	0.55 OMR	1.01	7.69
BANK DHOFAR	0.125	1.63	0.81	6.84	6.84	28.87	0.37 QAR	0.53	14.93
NAT BANK OF OMAN	0.195	1.04	0.52	4.86	4.86	21.25	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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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is down today by -0.03 %The leading sector bottom performance indices today are Technology -3.96 % Telecom -0.82 % Health care -0.61 % respectively

Telecommunication sector are down today by -0.82 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-26.13 %

KSA

Saudi Armco has positive performance today by + 0.13 %, SABIC has a positive performance today by + 0.30 %

STC has a negative performance today by -0.17 %, Al Rajhi Bank has a positive performance today by + 1.60 %

UAE

ETISALAT AD closed down today by - 0.39%, and act defensively with COVID19



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NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw