

شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, November 25, 2021

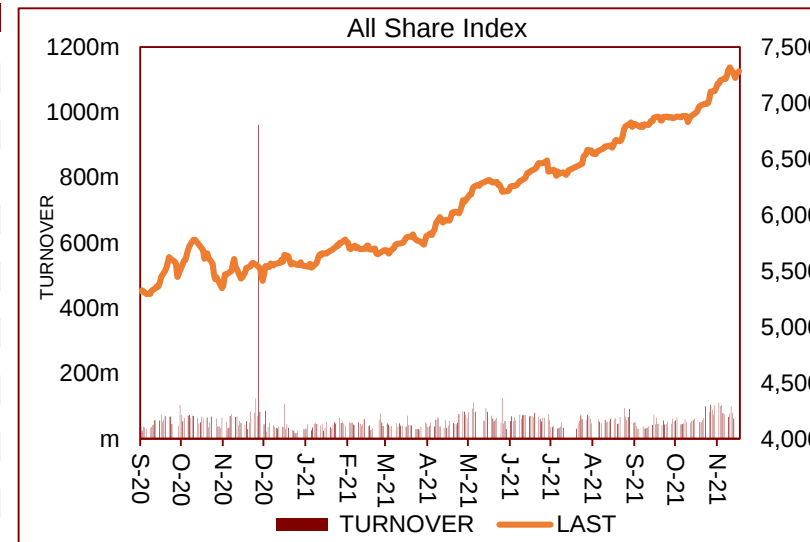




Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,128.21	-0.17	-2.09	0.34	3.89	28.59	42.44 KWD	2.09	26.31
Kuwait Premier Index	7,719.97	-0.19	-1.98	0.44	3.07	27.69	31.74 KWD	2.25	26.72
Kuwait Main Index	5,983.82	-0.11	-2.32	0.09	6.50	31.44	10.71 KWD	1.59	25.20
NIC 50	8,852.99	0.44	-2.03	0.36	3.00	27.69	28.60 KWD	2.23	25.72
Kuwait Sector									
Banking	1,631.59	-0.19	-1.92	0.72	3.51	29.24	24.38 KWD	1.24	27.72
Telecom	1,090.71	-0.18	-0.82	-1.13	-0.45	-1.05	3.35 KWD	0.95	15.09
Industrials	1,194.26	-0.36	-3.32	-0.74	2.33	34.02	4.25 KWD	1.01	14.64
Financial services	1,432.68	-0.35	-2.26	-0.39	8.63	54.10	3.71 KWD	0.91	11.52
Real estate	1,362.56	-0.13	-3.82	-0.48	6.50	43.03	2.94 KWD	0.80	55.85
Basic materials	1,063.55	-0.15	-3.09	-3.27	-2.31	18.36	0.95 KWD	1.83	28.48
Health care	798.89	0.11	0.88	0.51	0.38	-3.36	0.40 KWD	4.58	12.08
Consumer services	743.74	-0.87	-2.03	-4.15	-5.07	-0.35	0.69 KWD	0.90	15.90
Insurance	1,594.23	2.43	-2.58	7.91	9.94	37.89	0.65 KWD	0.86	8.35
Consumer Disc	1,336.17	-0.22	-2.41	5.71	19.60	63.23	0.23 KWD	1.38	9.14
Energy	1,454.31	0.13	-0.16	-0.32	5.63	13.86	0.30 KWD	1.07	16.39
Technology	771.15	6.00	0.00	0.00	7.94	53.40	0.01 KWD	0.86	0.00
Utilities	628.95	0.00	0.00	1.27	0.85	-13.72	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)	11,299.45	-0.62	-2.83	-2.78	-1.01	30.95	10,053 SAR	2.50	18.23
Qatar (QE Index)	11,790.98	0.01	-1.33	0.22	2.66	12.98	594 QAR	1.69	16.08
Dubai (DFMGI)	3,170.27	0.43	-2.91	10.69	11.41	27.22	315 AED	1.58	23.96
Abu Dhabi (ADI)	8,453.96	0.66	1.25	7.49	9.81	67.56	1,436 AED	1.84	23.06
Bahrain (BAX)	1,779.23	-0.72	-0.66	2.08	4.32	19.43	18 BHD	1.57	9.89
MUSCAT SE INDEX	4,118.22	0.28	1.34	1.06	4.46	12.56	5 OMR	0.88	13.25
Developed Markets									
MSCI World Index	3,202.44	0.14	-0.68	0.74	6.37	18.89			
U.S. (S&P 500)	4,701.46	0.33	0.07	2.09	9.14	25.17			
U.K. (FTSE 100)	7,310.37	0.33	1.02	0.83	2.98	12.95			
Japan (Topix)	2,025.69	0.33	-0.92	1.22	-0.22	12.25			
Emerging Markets									
MSCI EM Index	1,254.69	0.12	-1.27	-0.92	0.00	-2.95			
China (SSE Composite)	3,584.18	-0.24	0.67	1.04	0.45	3.20			
India (Sensex)	58,795.09	0.78	-1.41	-0.86	-0.56	23.13			



What Move the GCC markets ,

Oil Prices

Oil prices ticked lower on Thursday with investors waiting to see how major producers respond to the emergency crude release by major consuming countries designed to cool the market, even as data pointed to healthy U.S. fuel demand, Brent crude futures slipped 5 cents to \$82.20 a barrel, after losing 6 cents on Wednesday.

Kuwait Market

The market closed today down by -0.17%, value traded 37.8 million KD, Premier market value traded reached 17.6 million KD and closed at 7,719.97 down by - 0.19%.

Saudi Market

The Market closed down by -0.62%, with positive macroeconomic sentiments bounce of oil reaching \$82.20.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



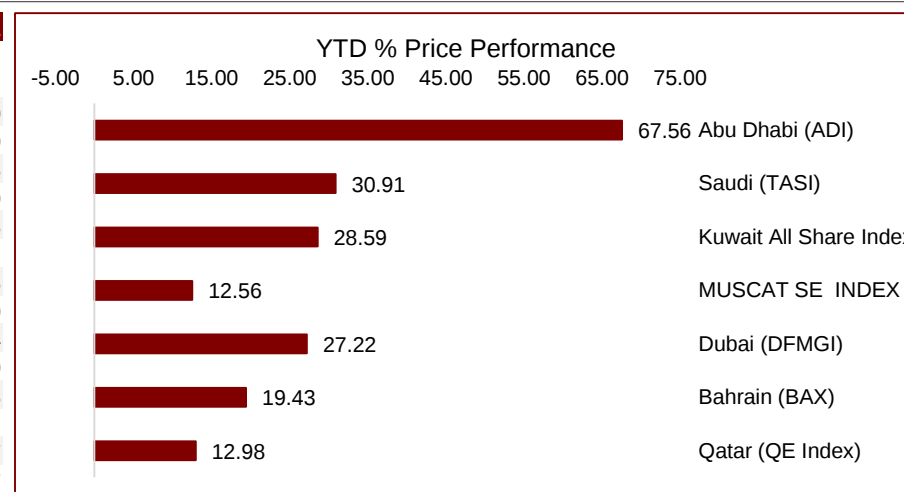
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.017	-0.10	-1.83	2.73	6.72	27.13	7.33 KWD	1.89	27.00
KFH	0.834	-0.12	-1.42	-0.24	1.46	35.51	7.05 KWD	3.24	32.00
Zain	0.590	-0.17	-1.01	-1.50	-1.50	-2.64	2.56 KWD	2.15	13.53
BOUBYAN BANK	0.795	-0.13	-2.44	1.66	3.91	47.52	2.53 KWD	3.61	34.00
Agility	0.997	-0.30	-4.22	1.11	1.42	62.56	2.23 KWD	1.02	2.13
Saudi Arabia									
ARAMCO	35.60	-1.11	-2.45	-5.28	-0.28	2.57	7,199.04 SAR	6.74	21.66
SABIC	119.40	-0.50	-4.15	-5.36	-5.81	18.34	359.95 SAR	2.07	35.00
STC	113.00	-0.88	-1.74	-1.74	-10.87	6.79	227.97 SAR	3.32	20.04
AL-RAJHI BANK	141.40	-0.42	-1.52	2.59	16.31	93.75	354.95 SAR	5.58	24.90
NCB	64.30	-1.38	-5.37	0.00	6.19	50.40	291.93 SAR	1.81	18.88
United Arab Emirates									
ETISALAT.AD	30.30	1.00	8.29	18.36	26.14	79.29	260.90 AED	5.66	28.27
FAB.AD	19.16	0.84	-2.74	7.64	7.76	48.53	207.48 AED	1.90	17.07
EMIRATES NBD	13.15	-1.13	-7.39	-4.36	-7.39	27.67	84.01 AED	0.98	10.53
DB ISLAMIC BK	5.35	0.75	-3.43	4.70	8.08	16.05	38.45 AED	1.01	14.16
EMAAR PROPERT	4.91	1.03	-4.10	21.53	20.34	39.09	39.75 AED	0.61	12.61
Qatar									
QNB	20.60	0.00	-1.90	0.98	7.57	15.54	190.27 QAR	1.90	16.16
INDUSTRIES QAT	15.42	0.06	-1.78	-4.44	0.19	42.41	93.23 QAR	2.49	13.99
QA ISLAMIC BK	18.14	0.00	0.00	-0.27	-0.55	6.08	42.86 QAR	1.79	13.53
MASRAF AL RAYA	4.80	1.05	-2.04	1.91	6.94	5.74	35.63 QAR	2.40	16.00
MESAIEED PETRO	2.21	-0.76	-3.89	1.00	-1.55	8.55	27.99 QAR	1.68	17.07
OMAN									
BANK MUSCAT	0.506	0.00	2.01	4.53	12.89	41.11	1.81 OMR	0.86	8.33
OMANTEL	0.744	1.09	-0.54	-3.66	-0.54	1.66	0.55 OMR	0.98	7.69
BANK DHOFAR	0.133	0.00	0.76	2.31	13.68	37.11	0.40 QAR	0.56	14.93
NAT BANK OF OMAN	0.194	0.00	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 -0.17 % The leading sector bottom performance indices today are Consumer services -0.87 % Industrials -0.36 % Financial services -0.35 % respectively

Telecommunication sector are down today by -0.18 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -29.64 %

KSA

Saudi Armco has a negative performance today by -1.11 %, SABIC has a negative performance today by -0.50 %

STC have negative performance today by -0.88 %, Al Rajhi Bank has a negative performance today by -0.42 %

UAE

ETISALAT AD closed up today by + 1.0 %, and act defensively with COVID19



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