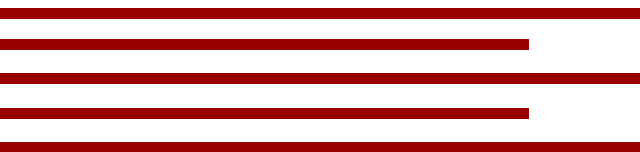
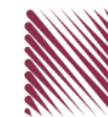


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



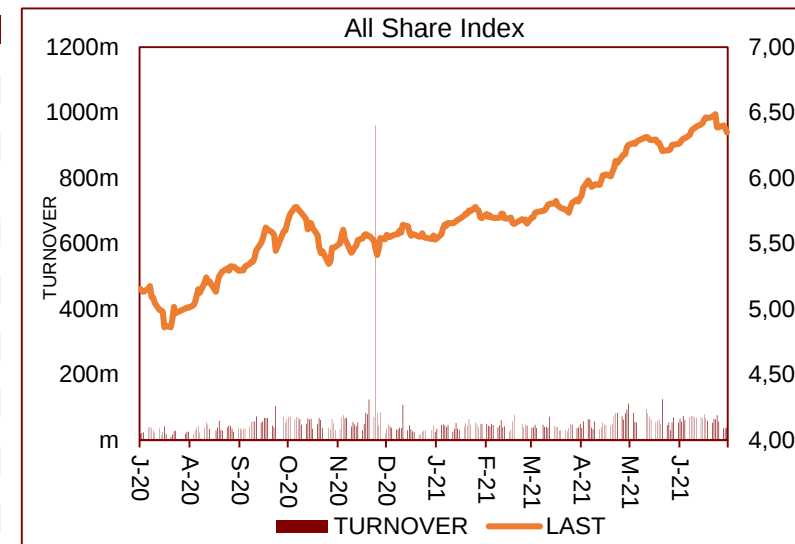
GCC DAILY MORNING BRIEF

Sunday, July 25, 2021



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,458.68	0.97	1.40	1.09	1.09	16.42	37.63 KWD	2.13	33.68
Kuwait Premier Index	7,009.67	1.09	1.28	1.05	1.05	15.83	28.17 KWD	2.28	35.29
Kuwait Main Index	5,387.33	0.60	1.77	1.22	1.22	18.22	9.46 KWD	1.66	29.05
NIC 50	7,813.58	1.06	1.23	0.97	0.98	15.83	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,463.31	1.21	1.21	1.06	1.06	15.91	21.37 KWD	1.38	36.29
Telecom	1,077.98	0.47	0.47	-0.23	-0.23	-2.21	3.29 KWD	0.64	13.49
Industrials	1,133.22	0.32	0.32	0.10	0.10	27.17	4.01 KWD	0.82	14.09
Financial services	1,214.21	1.11	1.11	4.98	4.98	30.60	3.03 KWD	0.79	11.52
Real estate	1,196.98	1.01	1.01	1.02	1.02	25.65	2.55 KWD	0.69	47.57
Basic materials	1,092.81	0.65	0.65	-0.24	-0.24	21.61	0.97 KWD	1.98	11.52
Health care	799.87	-0.89	-0.89	1.23	1.23	-3.24	0.40 KWD	3.70	39.71
Consumer services	778.66	1.88	1.88	-0.71	-0.71	4.33	0.52 KWD	1.01	10.15
Insurance	1,358.20	-1.28	-1.28	-1.97	-1.97	17.47	0.52 KWD	0.79	9.45
Consumer Disc	1,016.20	1.65	1.65	4.28	4.28	24.14	0.23 KWD	1.32	8.55
Energy	1,459.46	2.23	2.23	2.03	2.03	14.26	0.30 KWD	1.06	14.27
Technology	756.60	-2.80	-2.80	-7.97	-7.97	50.51	0.01 KWD	0.90	0.00
Utilities	589.47	0.00	0.00	-1.75	-1.75	-19.13	0.25 KWD	3.52	20.02



What Move the GCC markets ,

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,876.36	0.76	0.77	-0.97	-0.97	25.19	9,635 SAR	2.79	21.54
Qatar (QE Index)	10,777.66	0.76	-0.65	0.39	0.39	3.22	541 QAR	1.51	19.36
Dubai (DFMGI)	2,774.23	1.10	1.09	-1.29	-1.29	11.33	302 AED	1.50	11.46
Abu Dhabi (ADI)	7,105.76	0.58	0.52	3.95	3.95	40.84	995 AED	1.94	11.45
Bahrain (BAX)	1,586.15	0.45	0.59	-0.11	-0.11	6.47	16 BHD	1.24	23.39
MUSCAT SE INDEX	4,051.09	-0.59	-1.68	-0.30	-0.30	10.72	5 OMR	0.89	13.25
Developed Markets									
MSCI World Index	3,072.38	0.85	1.58	1.83	1.83	14.21			
U.S. (S&P 500)	4,411.79	0.33	1.96	2.66	2.66	17.46			
U.K. (FTSE 100)	7,027.58	0.85	0.28	-0.14	-0.14	8.78			
Japan (Topix)	1,904.41	0.82	-1.44	-2.01	-2.01	5.53			
Emerging Markets									
MSCI EM Index	1,311.30	-1.14	-2.15	-4.61	-4.61	1.55			
China (SSE Composite)	3,550.40	-0.68	0.31	-1.14	-1.14	2.23			
India (Sensex)	52,975.80	0.26	-0.31	0.94	0.94	10.94			

Oil Prices

Oil prices were little changed on Friday and Brent was on track to end the week higher after a strong recovery from Monday's steep slide, underpinned by expectations that supply will remain tight through the year, Brent crude advanced 31 cents, or 0.4%, to settle at \$74.10 after jumping 2.2% on Thursday.

Kuwait Market

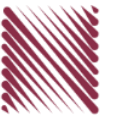
The market closed up by 0.97%, value traded 55.0 million KD, Premier market value traded reached 23.3 million KD and closed at 7,009 change by 1.09%.

Saudi Market

The Market closed up today by 0.76%, today market Performance is linked to oil prices raised to \$74.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



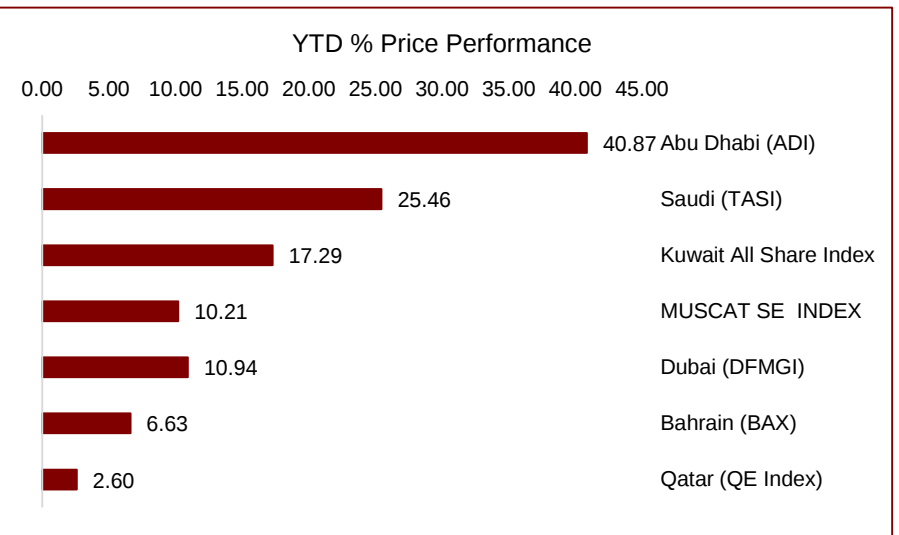
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.867	1.40	1.88	2.12	2.12	8.38	6.15 KWD	1.59	27.00
KFH	0.770	0.92	1.85	1.45	1.45	25.11	6.44 KWD	3.42	32.00
Zain	0.588	0.68	0.69	-0.34	-0.34	-3.14	2.53 KWD	2.26	13.49
BOUBAYAN BANK	0.746	2.19	-0.27	1.91	1.91	37.90	2.32 KWD	3.81	34.00
Agility	0.941	0.21	0.75	2.94	2.94	53.77	2.09 KWD	1.71	46.61
Saudi Arabia									
ARAMCO	34.90	0.00	0.14	-0.57	-0.57	-0.29	6,980.37 SAR	6.90	34.97
SABIC	119.80	0.67	2.56	-1.48	-1.48	18.34	357.02 SAR	2.08	35.00
STC	126.20	0.00	-1.71	-3.80	-3.80	19.43	252.41 SAR	3.87	23.05
AL-RAJHI BANK	109.40	1.11	1.29	-1.08	-1.08	49.18	270.51 SAR	4.57	23.37
NCB	54.00	-2.70	-4.08	-6.08	-6.08	24.80	248.54 SAR	1.99	14.51
United Arab Emirates									
ETISALAT.AD	22.46	0.72	-0.09	2.09	2.09	32.90	193.95 AED	4.34	21.09
FAB.AD	16.32	0.12	0.12	-2.28	-2.28	26.51	178.01 AED	1.73	17.31
EMIRATES NBD	13.50	3.05	1.89	1.89	1.89	31.07	82.75 AED	1.00	12.64
DB ISLAMIC BK	4.77	0.21	1.06	-1.04	-1.04	3.47	34.47 AED	0.95	13.92
EMAAR PROPERT	3.99	1.27	1.27	-4.09	-4.09	13.03	28.21 AED	0.51	11.44
Qatar									
QNB	18.00	1.12	0.56	0.28	0.28	0.95	163.60 QAR	1.70	14.44
INDUSTRIES QAT	13.25	0.38	-2.57	0.00	0.00	21.90	79.47 QAR	2.40	24.68
QA ISLAMIC BK	17.20	1.06	-0.23	-0.46	-0.46	0.58	40.02 QAR	1.75	13.28
MASRAF AL RAYA	4.44	1.00	-0.40	-0.34	-0.34	-1.90	32.84 QAR	2.32	14.77
MESAIEED PETRO	1.88	0.27	-0.53	-0.11	-0.11	-8.16	23.44 QAR	1.51	27.57
OMAN									
BANK MUSCAT	0.456	-0.44	3.17	7.55	7.55	26.67	1.64 OMR	0.82	8.33
OMANTEL	0.780	0.00	-1.02	-2.01	-2.01	7.73	0.59 OMR	1.09	7.69
BANK DHOFAR	0.126	0.00	-3.08	0.80	0.80	29.90	0.38 QAR	0.54	14.93
NAT BANK OF OMAN	0.185	-0.54	-5.61	-7.50	-7.50	15.63	0.30 QAR	0.56	12.71
OMINVEST	0.314	-1.26	-1.87	0.64	0.64	-7.10	0.26 QAR	0.99	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
7-Jul-21	19.98%	12.68%	0.06%	0.43%	0.35%	4.66%	2.56%	10.52%	5.05%	4.05%
14-Jul-21	20.01%	12.74%	0.06%	0.41%	0.37%	4.66%	2.56%	10.54%	5.04%	4.08%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is up today by + 0.97 %The leading sector best performance indices today are Consumer services 1.88 % Consumer Disc 1.65 % Banking 1.21 % respectively

from YTD performance perspective the best sector performance is Financial services by 30.6 % while the bottom sector performance is Utilities by -19.13 %

Telecommunication sector are up today by + 0.47 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-18.63 %

KSA

Saudi Armco has flat performance today, SABIC have positive performance today by + 0.67 %

STC has flat performance today, Al Rajhi Bank has a positive performance today by + 1.11 %

UAE

ETISALAT AD closed up today by + 0.72 % , and act defensively with COVID19



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