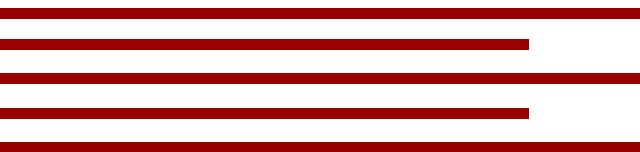
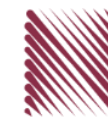


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MORNING BRIEF

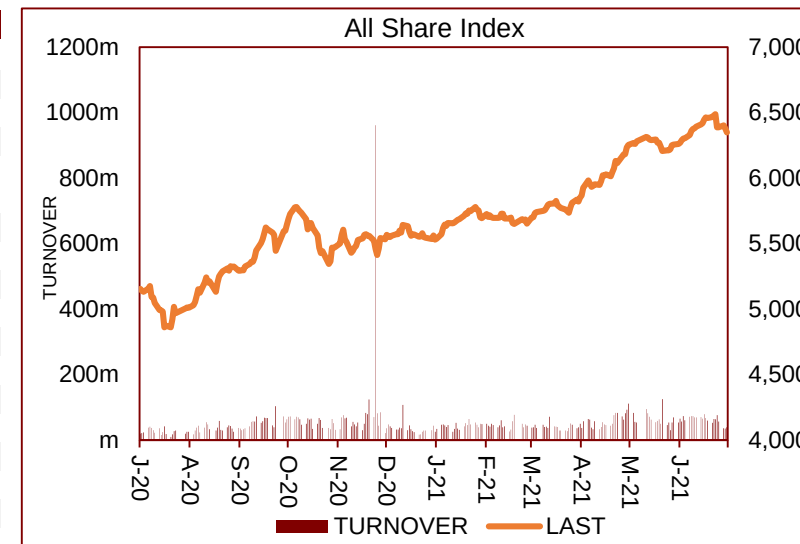
Monday, July 26, 2021



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,524.78	1.02	1.96	2.12	2.12	17.60	37.98 KWD	2.12	34.16
Kuwait Premier Index	7,094.15	1.21	2.31	2.28	2.28	17.24	28.46 KWD	2.26	35.69
Kuwait Main Index	5,412.62	0.47	0.99	1.71	1.71	18.79	9.52 KWD	1.69	29.76
NIC 50	7,903.18	1.15	2.26	2.20	2.21	17.24	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,485.74	1.53	2.76	2.61	2.61	17.69	21.60 KWD	1.38	36.69
Telecom	1,083.27	0.49	0.96	0.26	0.26	-1.73	3.31 KWD	0.65	13.58
Industrials	1,138.30	0.45	0.77	0.55	0.55	27.74	4.02 KWD	0.82	14.10
Financial services	1,220.83	0.55	1.66	5.56	5.56	31.31	3.07 KWD	0.81	11.76
Real estate	1,200.92	0.33	1.34	1.35	1.35	26.06	2.58 KWD	0.70	48.78
Basic materials	1,086.03	-0.62	0.03	-0.86	-0.86	20.86	0.98 KWD	1.95	11.62
Health care	801.32	0.18	-0.71	1.41	1.41	-3.06	0.40 KWD	3.51	39.71
Consumer services	778.33	-0.04	1.84	-0.75	-0.75	4.28	0.53 KWD	1.01	10.27
Insurance	1,359.57	0.10	-1.18	-1.87	-1.87	17.59	0.52 KWD	0.79	9.30
Consumer Disc	1,018.62	0.24	1.89	4.53	4.53	24.43	0.24 KWD	1.33	8.74
Energy	1,457.73	-0.12	2.11	1.91	1.91	14.12	0.30 KWD	1.06	14.51
Technology	742.05	-1.92	-4.67	-9.74	-9.74	47.61	0.01 KWD	0.88	0.00
Utilities	589.47	0.00	0.00	-1.75	-1.75	-19.13	0.25 KWD	3.52	20.02

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,897.87	0.20	0.69	-1.05	-1.05	25.08	9,657 SAR	2.82	21.77
Qatar (QE Index)	10,679.25	-0.91	0.09	-0.23	-0.23	2.58	547 QAR	1.52	19.40
Dubai (DFMGI)	2,758.82	-0.56	0.54	-1.84	-1.84	10.71	306 AED	1.57	11.51
Abu Dhabi (ADI)	7,169.03	0.89	1.47	4.88	4.88	42.09	995 AED	1.94	11.44
Bahrain (BAX)	1,596.55	0.66	1.11	0.54	0.54	7.17	16 BHD	1.26	23.42
MUSCAT SE INDEX	4,005.91	-1.12	-1.70	-1.41	-1.41	9.49	5 OMR	0.89	13.25
Developed Markets									
MSCI World Index	3,072.38	0.85	0.00	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)	7,007.08	-0.29	-0.28	-0.42	-0.42	8.47			
Japan (Topix)	1,925.62	1.11	1.11	-0.92	-0.92	6.70			
Emerging Markets									
MSCI EM Index	1,311.30	-1.14	0.00	-4.61	-4.61	1.55			
China (SSE Composite)	3,467.44	-2.34	-2.34	-3.45	-3.45	-0.16			
India (Sensex)	52,852.27	-0.23	-0.25	0.68	0.68	10.66			



What Move the GCC markets ,

Oil Prices

Oil prices fell on Monday as concerns about fuel demand from the spread of COVID-19 variants and floods in China offset expectations of tight supplies through the rest of the year, Brent crude futures for September fell 44 cents, or 0.6%, to \$73.66 a barrel.

Kuwait Market

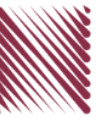
The market closed up by 1.02%, value traded 71.3 million KD, Premier market value traded reached 42.7 million KD and closed at 7,094 change by 1.21%.

Saudi Market

The Market closed up today by 0.20%, today market Performance is linked to oil prices raised to \$73.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



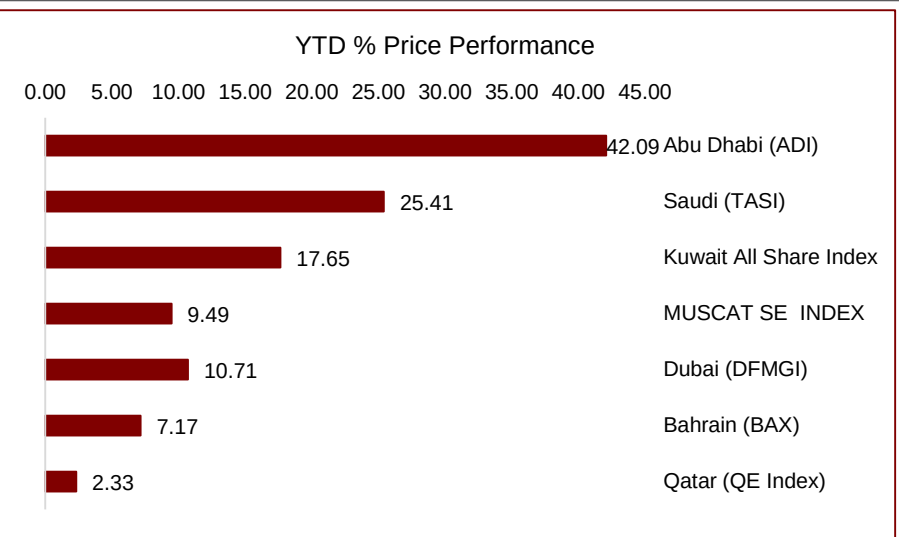
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.889	2.54	3.63	4.36	4.36	10.75	6.24 KWD	1.61	27.00
KFH	0.773	0.39	1.44	1.98	1.98	25.76	6.50 KWD	3.45	32.00
Zain	0.590	0.34	1.37	0.51	0.51	-2.31	2.54 KWD	2.20	13.58
BOUBYAN BANK	0.767	2.82	5.07	4.78	4.78	41.79	2.37 KWD	3.43	34.00
Agility	0.947	0.64	0.75	3.05	3.05	53.93	2.10 KWD	1.72	46.71
Saudi Arabia									
ARAMCO	34.75	-0.43	-0.43	-1.00	-1.00	-0.71	6,979.81 SAR	6.90	34.87
SABIC	120.00	0.17	0.50	-1.81	-1.81	17.95	359.39 SAR	2.10	35.00
STC	127.00	0.63	0.32	-3.80	-3.80	19.43	252.39 SAR	3.87	22.87
AL-RAJHI BANK	110.00	0.55	1.48	-1.08	-1.08	49.18	273.49 SAR	4.62	23.42
NCB	54.40	0.74	-2.34	-5.90	-5.90	25.03	241.81 SAR	1.94	14.38
United Arab Emirates									
ETISALAT.AD	22.70	1.07	1.79	3.18	3.18	34.32	195.33 AED	4.37	21.24
FAB.AD	16.30	-0.12	0.00	-2.40	-2.40	26.36	178.21 AED	1.73	17.34
EMIRATES NBD	13.35	-1.11	1.91	0.75	0.75	29.61	85.27 AED	1.03	13.03
DB ISLAMIC BK	4.76	-0.21	0.00	-1.24	-1.24	3.25	34.54 AED	0.95	13.95
EMAAR PROPERT	3.93	-1.50	-0.25	-5.53	-5.53	11.33	28.57 AED	0.51	11.59
Qatar									
QNB	18.00	0.00	1.12	0.28	0.28	0.95	166.26 QAR	1.72	14.60
INDUSTRIES QAT	13.10	-1.13	0.23	-0.15	-0.15	21.71	80.16 QAR	2.41	24.78
QA ISLAMIC BK	16.90	-1.74	-0.35	-1.91	-1.91	-0.88	40.64 QAR	1.77	13.42
MASRAF AL RAYA	4.43	-0.43	0.73	-0.61	-0.61	-2.16	33.33 QAR	2.34	14.91
MESAIEED PETRO	1.90	0.96	1.33	0.96	0.96	-7.18	23.62 QAR	1.51	27.65
OMAN									
BANK MUSCAT	0.448	-2.18	-1.31	6.60	6.60	25.56	1.63 OMR	0.82	8.33
OMANTEL	0.776	-0.51	-0.51	-2.01	-2.01	7.73	0.58 OMR	1.09	7.69
BANK DHOFAR	0.125	-0.79	0.00	0.80	0.80	29.90	0.38 QAR	0.54	14.93
NAT BANK OF OMAN	0.185	0.00	0.00	-7.50	-7.50	15.63	0.30 QAR	0.56	12.71
OMINVEST	0.314	0.00	-0.63	0.64	0.64	-7.10	0.25 QAR	0.98	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 + 1.02 %The leading sector best performance indices today are Financial services 0.55 % Telecom 0.49 % Industrials 0.45 % respectively

from YTD performance perspective the best sector performance is Financial services by 31.31 % while the bottom sector performance is Utilities by -19.13 %

Telecommunication sector are up today by + 0.49 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-19.33 %

KSA

Saudi Armco have negative performance today by -0.43 %, SABIC have positive performance today by + 0.17 %

STC has a positive performance today by + 0.63 %, Al Rajhi Bank has positive performance today + 0.55 %

UAE

ETISALAT AD closed up today by + 1.07 % , and act defensively with COVID19



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