



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, September 26, 2021

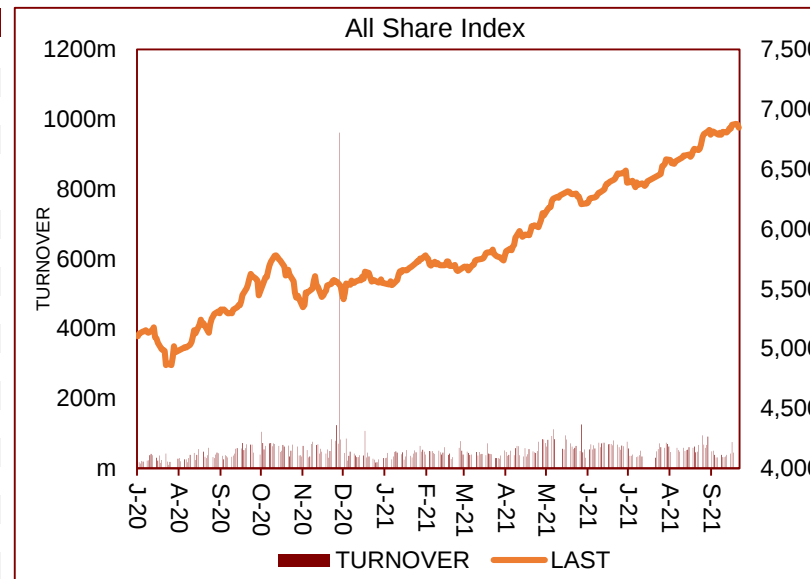




Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,878.03	0.03	0.09	1.31	7.66	23.98	40.29 KWD	2.65	26.92
Kuwait Premier Index	7,516.82	0.00	-0.11	0.96	8.17	23.99	30.36 KWD	2.32	28.33
Kuwait Main Index	5,615.66	0.12	0.10	1.80	5.44	23.15	9.93 KWD	3.65	22.70
NIC 50	8,362.44	0.47	-0.16	0.88	8.10	23.99	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,580.91	-0.09	0.08	1.39	9.28	25.34	23.22 KWD	1.30	29.33
Telecom	1,098.13	-0.22	-0.01	-1.16	1.87	-0.16	3.37 KWD	0.70	13.00
Industrials	1,167.45	0.04	-0.14	0.11	3.08	30.96	4.13 KWD	0.88	11.47
Financial services	1,316.13	0.35	0.24	4.09	13.40	41.07	3.25 KWD	0.81	10.97
Real estate	1,285.40	0.40	0.09	2.96	8.05	34.39	2.74 KWD	0.69	28.13
Basic materials	1,077.63	0.32	0.75	-0.80	-1.94	19.54	0.96 KWD	1.94	11.75
Health care	794.37	0.34	-0.83	-0.01	0.19	-4.23	0.39 KWD	4.50	13.31
Consumer services	773.53	-0.09	1.85	4.62	-1.27	3.73	0.57 KWD	1.05	9.96
Insurance	1,453.88	0.22	0.26	-0.60	4.70	25.47	0.60 KWD	0.80	9.67
Consumer Disc	1,120.26	0.88	-0.06	1.89	13.96	35.65	0.24 KWD	1.37	9.67
Energy	1,389.97	1.15	0.79	0.89	-3.93	7.58	0.28 KWD	1.02	14.44
Technology	699.13	-3.90	1.01	-0.20	-11.50	44.72	0.01 KWD	0.81	0.00
Utilities	628.95	0.84	0.42	1.72	3.95	-14.44	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)	11,270.57	-0.40	-1.33	-0.43	2.61	29.70	9,781 SAR	2.73	20.16
Qatar (QE Index)	11,313.50	0.65	0.56	1.36	4.78	7.74	563 QAR	1.71	16.32
Dubai (DFMGI)	2,832.00	-0.27	-2.12	-2.18	1.03	13.95	313 AED	1.55	19.38
Abu Dhabi (ADI)	7,774.81	-0.64	-0.74	1.82	14.47	55.09	1,348 AED	1.77	24.52
Bahrain (BAX)	1,698.08	-0.26	1.39	3.47	7.21	14.28	17 BHD	1.17	11.04
MUSCAT SE INDEX	3,928.52	0.04	-0.20	-1.00	-3.35	7.33	5 OMR	0.89	13.25
Developed Markets									
MSCI World Index	3,074.35	0.81	-0.72	-2.13	1.89	14.29			
U.S. (S&P 500)	4,395.64	0.33	-0.84	-2.81	2.28	17.03			
U.K. (FTSE 100)	7,092.75	0.13	1.85	-0.38	0.79	9.79			
Japan (Topix)	2,043.55	-1.02	-2.70	4.23	5.14	13.24			
Emerging Markets									
MSCI EM Index	1,262.79	0.11	-1.29	-3.51	-8.14	-2.20			
China (SSE Composite)	3,642.22	0.38	0.78	2.77	1.42	4.87			
India (Sensex)	59,885.36	1.63	1.47	4.05	14.10	25.40			



What Move the GCC markets ,

Oil Prices

oil prices rose for a fifth straight day on Monday with Brent heading for \$80 amid supply concerns as parts of the world sees demand pick up with the easing of pandemic conditions, Brent crude was up \$1.14 or 1.5% at \$79.23 a barrel

Kuwait Market

The market closed up today by + 0.03%, value traded 43.8 million KD, Premier market value traded reached 16.3 million KD and closed at 7,516 flat.

Saudi Market

The Market closed down today by - 0.40%, with positive macroeconomic sentiments bounce of oil reaching \$79.23 or +1.5%.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



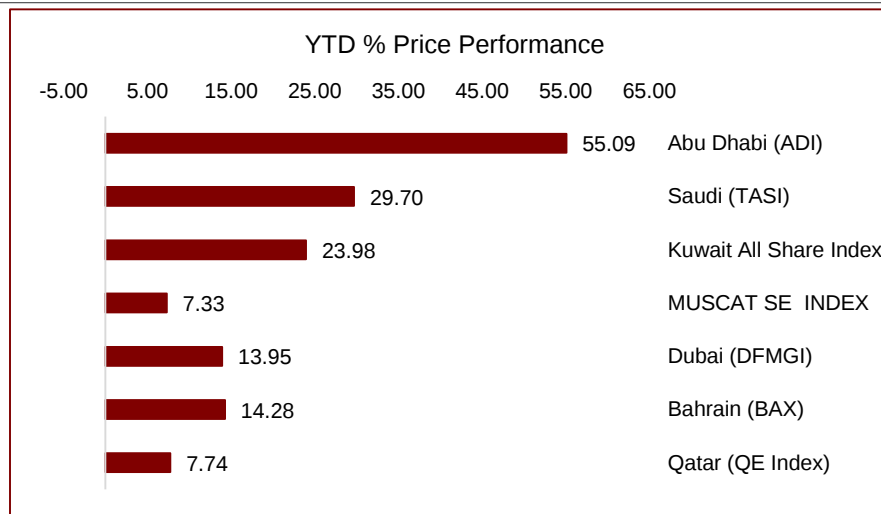
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	0.960	0.73	-0.42	2.14	12.60	19.50	6.86 KWD	1.81	27.00
KFH	0.825	0.24	-0.84	-0.36	8.43	33.72	6.95 KWD	3.28	32.00
Zain	0.602	0.33	-0.17	-1.80	1.87	-0.99	2.60 KWD	2.24	13.86
BOUBYAN BANK	0.771	0.52	-1.41	-1.66	5.19	42.34	2.44 KWD	3.52	34.00
Agility	0.989	0.00	-0.10	-1.10	7.63	60.77	2.21 KWD	1.78	27.60
Saudi Arabia									
ARAMCO	35.10	0.43	-0.57	-0.57	-0.43	-0.14	6,990.93 SAR	6.79	26.34
SABIC	125.20	2.45	-1.29	-0.65	0.33	20.51	366.65 SAR	2.16	35.00
STC	129.00	-1.23	-1.51	-3.26	-0.76	23.21	261.23 SAR	4.08	23.68
AL-RAJHI BANK	121.80	0.66	-1.94	0.00	9.01	64.40	302.54 SAR	5.07	23.90
NCB	60.20	0.67	-2.76	-1.64	3.82	37.95	267.82 SAR	1.66	16.57
United Arab Emirates									
ETISALAT.AD	24.26	-1.22	-1.37	4.07	11.64	45.33	211.51 AED	4.49	22.98
FAB.AD	18.26	-0.76	-1.60	8.24	10.18	42.64	199.62 AED	1.89	18.56
EMIRATES NBD	14.05	0.36	-1.75	1.08	5.66	35.92	88.43 AED	1.06	12.68
DB ISLAMIC BK	4.92	0.00	-1.99	-3.53	2.07	6.72	35.91 AED	0.97	15.03
EMAAR PROPERT	4.02	-1.23	-3.10	-3.10	-2.16	15.30	29.21 AED	0.52	13.46
Qatar									
QNB	19.03	-0.37	-1.35	-0.68	6.07	6.79	173.93 QAR	1.82	15.42
INDUSTRIES QAT	14.48	2.12	5.27	10.35	7.02	30.45	83.35 QAR	2.38	16.72
QA ISLAMIC BK	18.14	0.89	-1.10	-1.69	4.05	5.14	42.11 QAR	1.85	14.03
MASRAF AL RAYA	4.46	0.20	0.18	-2.20	-0.20	-1.77	33.07 QAR	2.34	14.93
MESAIEED PETRO	2.27	2.34	2.00	12.15	19.18	9.58	27.87 QAR	1.74	21.52
OMAN									
BANK MUSCAT	0.442	0.00	0.45	0.45	4.25	22.78	1.58 OMR	0.77	8.33
OMANTEL	0.748	0.00	-0.53	-1.06	-6.03	3.31	0.56 OMR	1.01	7.69
BANK DHOFAR	0.118	0.00	0.00	0.00	-5.60	21.65	0.35 QAR	0.51	14.93
NAT BANK OF OMAN	0.185	0.00	-2.63	-1.60	-7.50	15.63	0.30 QAR	0.55	12.71
OMINVEST	0.310	0.00	-0.64	-2.52	-0.64	-8.28	0.25 QAR	0.92	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
15-Sep-21	20.77%	10.56%	0.06%	0.35%	0.36%	4.68%	2.72%	10.92%	5.22%	4.19%
22-Sep-21	20.89%	9.91%	0.06%	0.37%	0.38%	4.58%	2.61%	11.00%	5.25%	4.11%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is up today by + 0.03 % The leading sector best performance indices today are Energy 1.15 % Consumer Disc 0.88 % Utilities 0.84 % respectively

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Telecommunication sector is down today by - 0.22 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -0.14 %

KSA

Saudi Armco has a positive performance today by + 0.43 %, SABIC has a positive performance today by + 2.45 %

STC has a negative performance today by -1.23 %, Al Rajhi Bank has a positive performance today by + 0.66 %

UAE

ETISALAT AD closed down today by - 1.22%, and act defensively with COVID19



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