



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



## GCC DAILY MORNING BRIEF

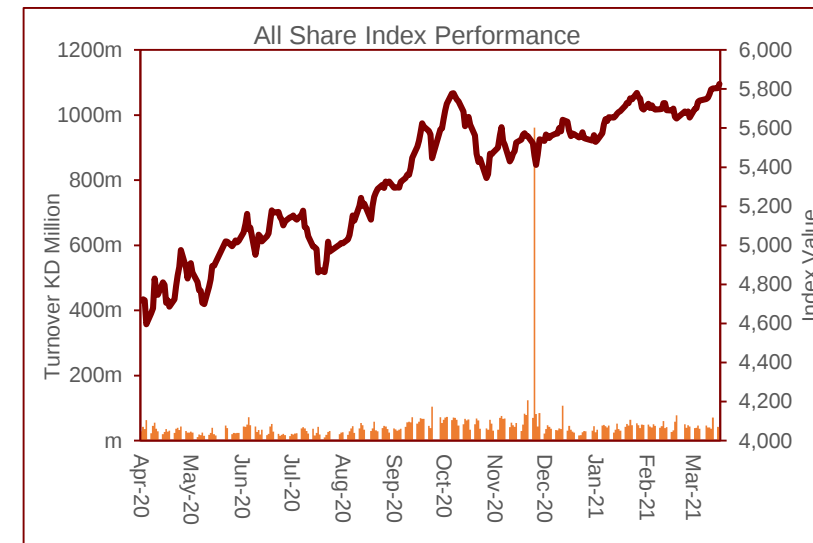
Tuesday, April 27, 2021



### Market Watch

| Description            | Close    | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|------------------------|----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>Kuwait</b>          |          | %     | %     | %     | %     | %     |               |      |       |
| Kuwait All Share Index | 6,074.20 | 0.49  | 0.75  | 5.16  | 5.16  | 9.52  | 35.69 KWD     | 1.97 | 35.34 |
| Kuwait Premier Index   | 6,601.52 | 0.29  | 0.17  | 4.38  | 4.38  | 9.10  | 26.80 KWD     | 2.13 | 34.33 |
| Kuwait Main Index      | 5,045.18 | 1.09  | 2.57  | 7.64  | 7.64  | 10.82 | 8.88 KWD      | 1.47 | 38.66 |
| NIC 50                 | 7,383.91 | 0.40  | 0.12  | 4.30  | 4.31  | 9.10  | 28.60 KWD     | 1.57 | 15.56 |
| <b>Kuwait Sector</b>   |          |       |       |       |       |       |               |      |       |
| Banking                | 1,369.13 | -0.15 | 0.09  | 4.18  | 4.18  | 8.45  | 20.22 KWD     | 1.39 | 35.33 |
| Telecom                | 1,110.13 | -0.38 | -0.54 | -0.41 | -0.41 | 0.71  | 3.40 KWD      | 0.60 | 14.21 |
| Industrials            | 1,003.63 | 4.46  | 3.48  | 8.99  | 8.99  | 12.63 | 3.59 KWD      | 0.76 | 12.61 |
| Financial services     | 1,114.97 | -0.08 | 2.32  | 13.21 | 13.21 | 19.93 | 2.82 KWD      | 0.72 | 5.25  |
| Real estate            | 1,105.95 | 2.03  | 3.12  | 8.77  | 8.77  | 16.09 | 2.38 KWD      | 0.65 | 57.81 |
| Basic materials        | 1,187.34 | -0.94 | -1.74 | 9.02  | 9.02  | 32.13 | 1.06 KWD      | 1.84 | 24.05 |
| Health care            | 792.18   | 0.15  | 0.00  | -2.23 | -2.23 | -4.17 | 0.39 KWD      | 4.15 | 40.51 |
| Consumer services      | 726.25   | -0.33 | 0.76  | 2.61  | 2.61  | -2.69 | 0.44 KWD      | 0.80 | 9.09  |
| Insurance              | 1,280.06 | 3.51  | 3.24  | 6.58  | 6.58  | 10.72 | 0.48 KWD      | 0.88 | 8.32  |
| Consumer Disc          | 846.44   | 2.45  | 3.05  | 0.10  | 0.10  | 3.40  | 0.22 KWD      | 1.28 | 28.11 |
| Energy                 | 1,310.16 | 2.49  | 2.69  | 6.93  | 6.93  | 2.57  | 0.27 KWD      | 0.85 | 14.10 |
| Technology             | 763.88   | 7.14  | 10.53 | 28.05 | 28.05 | 51.96 | 0.01 KWD      | 0.87 | 0.00  |
| Utilities              | 676.32   | 0.00  | -3.74 | -4.10 | -4.10 | -7.22 | 0.28 KWD      | 6.98 | 22.96 |

| Description              | Close     | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|--------------------------|-----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>GCC Markets</b>       |           | %     | %     | %     | %     | %     |               |      |       |
| Saudi (TASI)             | 10,267.17 | 0.35  | 1.31  | 3.63  | 3.63  | 18.16 | 9,601 SAR     | 2.50 | 22.10 |
| Qatar (QE Index)         | 10,968.88 | 0.58  | 1.05  | 5.35  | 5.35  | 5.01  | 559 QAR       | 1.63 | 17.94 |
| Dubai (DFMGI)            | 2,630.07  | -0.62 | 0.17  | 3.13  | 3.13  | 5.54  | 289 AED       | 1.28 | 31.23 |
| Abu Dhabi (ADI)          | 6,120.22  | -0.42 | 0.00  | 0.00  | 0.00  | 0.00  | 885 AED       | 1.67 | 18.43 |
| Bahrain (BAX)            | 1,483.18  | -0.24 | -0.21 | 1.72  | 1.72  | -0.44 | 15 BHD        | 1.32 | 11.12 |
| MUSCAT SE INDEX          | 3,717.59  | -0.09 | -0.04 | 0.24  | 0.24  | 1.61  | 5 OMR         | 0.81 | 13.25 |
| <b>Developed Markets</b> |           |       |       |       |       |       |               |      |       |
| MSCI World Index         | 2,956.13  | 0.34  | 0.34  | 5.14  | 5.14  | 9.89  |               |      |       |
| U.S. (S&P 500)           | 4,187.62  | 0.33  | 0.18  | 5.40  | 5.40  | 11.49 |               |      |       |
| U.K. (FTSE 100)          | 6,949.81  | -0.19 | 0.16  | 3.52  | 3.52  | 7.57  |               |      |       |
| Japan (Topix)            | 1,903.55  | -0.76 | -0.60 | -2.58 | -2.58 | 5.48  |               |      |       |
| <b>Emerging Markets</b>  |           |       |       |       |       |       |               |      |       |
| MSCI EM Index            | 1,360.64  | 0.56  | 0.56  | 3.36  | 3.36  | 5.37  |               |      |       |
| China (SSE Composite)    | 3,442.61  | 0.04  | -0.91 | 0.02  | 0.02  | -0.88 |               |      |       |
| India (Sensex)           | 48,944.14 | 1.15  | 2.22  | -1.15 | -1.15 | 2.49  |               |      |       |



### What Move the GCC markets ,

#### Oil Prices

Oil prices rebounded on Tuesday after falling in the previous session, but gains are likely to be capped amid growing concern about fuel demand in India, the world's third-biggest crude importer now slammed by spiraling new coronavirus cases. Brent crude was up 36 cents, or 0.6%, at \$66.01 a barrel.

#### Kuwait Market

The market closed today up by 0.49%, value traded 76.1 million KD, Premier market value traded reach 44.4 million KD and closed at 6,601 change by 0.29%.

#### Saudi Market

The Market closed up by 0.35%, today market Performance are linked to oil prices raised to \$66.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



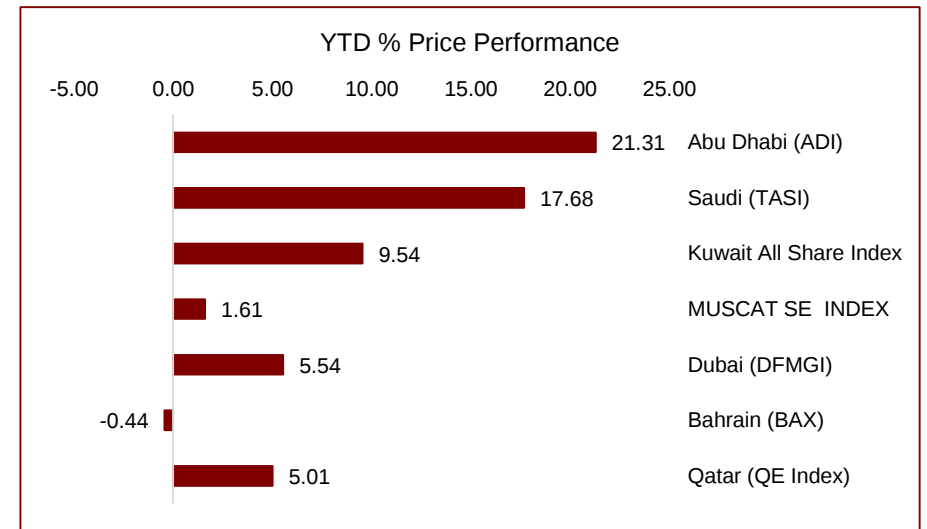
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|-----------------------------|--------|-------|-------|-------|-------|-------|---------------|------|-------|
|                             |        | %     | %     | %     | %     | %     |               |      |       |
| <b>Blue Chip Watch</b>      |        |       |       |       |       |       |               |      |       |
| <b>Kuwait</b>               |        |       |       |       |       |       |               |      |       |
| NBK                         | 0.829  | 0.00  | 0.12  | 2.73  | 2.73  | 3.63  | 5.96 KWD      | 1.54 | 27.00 |
| KFH                         | 0.729  | 0.00  | 0.00  | 4.41  | 4.41  | 18.45 | 6.15 KWD      | 3.15 | 32.00 |
| Zain                        | 0.604  | -0.66 | -0.66 | -0.17 | -0.17 | -0.33 | 2.61 KWD      | 1.99 | 14.21 |
| BOUBYAN BANK                | 0.654  | 0.31  | 0.31  | 13.50 | 13.50 | 20.90 | 2.08 KWD      | 3.41 | 34.00 |
| Agility                     | 0.850  | 9.68  | 0.00  | 0.00  | 0.00  | 0.00  | 1.72 KWD      | 1.42 | 36.42 |
| <b>Saudi Arabia</b>         |        |       |       |       |       |       |               |      |       |
| ARAMCO                      | 35.40  | 0.00  | 0.00  | -1.67 | -1.67 | 1.14  | 7,079.81 SAR  | 7.14 | 38.21 |
| SABIC                       | 120.00 | 0.00  | 0.17  | 2.21  | 2.21  | 18.34 | 359.99 SAR    | 2.15 | 35.00 |
| STC                         | 126.20 | -0.63 | 0.64  | -0.47 | -0.47 | 19.06 | 253.99 SAR    | 3.97 | 22.93 |
| AL-RAJHI BANK               | 97.80  | -0.20 | 1.03  | -1.01 | -1.01 | 32.88 | 244.99 SAR    | 4.22 | 20.86 |
| NCB                         | 54.40  | 1.30  | 1.30  | 2.45  | 2.45  | 25.49 | 240.46 SAR    | 2.02 | 13.78 |
| <b>United Arab Emirates</b> |        |       |       |       |       |       |               |      |       |
| ETISALAT.AD                 | 21.44  | -1.29 | 0.00  | 0.00  | 0.00  | 0.00  | 186.46 AED    | 3.80 | 20.93 |
| FAB.AD                      | 14.56  | -0.27 | 0.69  | -0.27 | -0.27 | 12.87 | 159.00 AED    | 1.55 | 15.51 |
| EMIRATES NBD                | 12.35  | 0.00  | 2.92  | 7.39  | 7.39  | 19.90 | 78.01 AED     | 0.94 | 11.92 |
| DB ISLAMIC BK               | 4.51   | -1.10 | -0.22 | -0.88 | -0.88 | -2.17 | 32.66 AED     | 0.80 | 12.01 |
| EMAAR PROPERT               | 3.82   | -1.29 | -1.29 | 7.91  | 7.91  | 8.22  | 27.35 AED     | 0.48 | 10.59 |
| <b>Qatar</b>                |        |       |       |       |       |       |               |      |       |
| QNB                         | 17.99  | 0.00  | 0.11  | -0.11 | -0.11 | 0.79  | 166.16 QAR    | 1.80 | 15.46 |
| INDUSTRIES QAT              | 13.68  | 2.86  | 5.88  | 14.56 | 14.56 | 25.94 | 82.76 QAR     | 2.49 | 24.87 |
| QA ISLAMIC BK               | 17.40  | 0.00  | -0.29 | 5.71  | 5.71  | 1.69  | 41.12 QAR     | 1.86 | 14.07 |
| MASRAF AL RAYA              | 4.47   | 0.38  | -0.11 | 4.08  | 4.08  | -1.43 | 33.53 QAR     | 2.45 | 15.16 |
| MESAIEED PETRO              | 1.97   | 4.24  | 0.00  | 0.00  | 0.00  | 0.00  | 24.72 QAR     | 1.57 | 44.53 |
| <b>OMAN</b>                 |        |       |       |       |       |       |               |      |       |
| BANK MUSCAT                 | 0.386  | 0.00  | -0.52 | 0.52  | 0.52  | 7.22  | 1.39 OMR      | 0.68 | 8.33  |
| OMANTEL                     | 0.760  | 0.00  | 1.06  | -3.55 | -3.55 | 4.97  | 0.57 OMR      | 0.99 | 7.69  |
| BANK DHOFAR                 | 0.104  | -3.70 | 0.00  | 1.89  | 1.89  | 11.34 | 0.31 QAR      | 0.45 | 14.93 |
| NAT BANK OF OMAN            | 0.155  | 0.00  | -0.65 | 2.67  | 2.67  | -3.75 | 0.25 QAR      | 0.47 | 12.71 |
| OMINVEST                    | 0.308  | 0.65  | 0.00  | -3.75 | -3.75 | -8.88 | 0.25 QAR      | 0.93 | 6.85  |

| Foreign Holding |        |        |       |       |         |       |       |        |       |       |
|-----------------|--------|--------|-------|-------|---------|-------|-------|--------|-------|-------|
| Date            | NBK    | GBK    | CBK   | ABK   | MUTAHED | KIB   | BURG  | KFH    | BOUB  | WARBA |
| 14-Apr-21       | 19.72% | 11.97% | 0.06% | 1.07% | 0.33%   | 4.57% | 2.62% | 10.26% | 5.04% | 4.20% |
| 21-Apr-21       | 19.76% | 11.91% | 0.06% | 1.07% | 0.34%   | 4.57% | 2.63% | 10.26% | 5.04% | 4.19% |

### End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



### Leading Sector Performance

The market are up today by + 0.49 %The leading sector best performance indices today are Industrials 4.46 % Insurance 3.51 % Energy 2.49 % respectively

from YTD performance perspective the best sector performance are Basic materials by 32.2 % while the bottom sector performance is Utilities by -7.22 %

Telecommunication sector are down today by -0.38 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-8.7 %

### KSA

Saudi Armco are flat performance today 0 %, SABIC flat performance today 0 %

STC are have negative performance today by -0.63 %, Al Rajhi Bank have negative performance today by -0.2 %

### UAE

ETISALAT AD closed today down by - 1.29% and act defensively with COVID19



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