

شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MORNING BRIEF

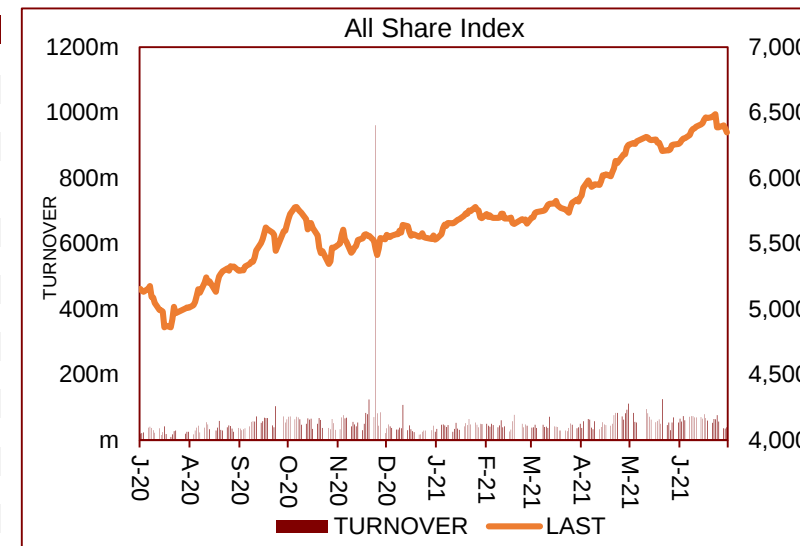
Tuesday, July 27, 2021



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,531.27	0.10	2.10	2.26	2.26	17.76	38.37 KWD	2.15	33.86
Kuwait Premier Index	7,104.29	0.14	2.44	2.41	2.41	17.39	28.81 KWD	2.29	35.27
Kuwait Main Index	5,410.76	-0.03	1.04	1.77	1.77	18.85	9.56 KWD	1.70	29.79
NIC 50	7,910.89	0.10	2.39	2.33	2.34	17.39	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,487.20	0.10	2.86	2.71	2.71	17.80	21.94 KWD	1.38	36.27
Telecom	1,084.15	0.08	1.04	0.34	0.34	-1.65	3.32 KWD	0.65	13.63
Industrials	1,139.13	0.07	0.85	0.62	0.62	27.83	4.04 KWD	0.84	14.20
Financial services	1,218.70	-0.17	1.48	5.37	5.37	31.08	3.08 KWD	0.80	11.84
Real estate	1,203.58	0.22	1.56	1.58	1.58	26.34	2.58 KWD	0.70	48.89
Basic materials	1,088.46	0.22	0.25	-0.64	-0.64	21.13	0.97 KWD	1.95	11.64
Health care	801.32	0.00	-0.71	1.41	1.41	-3.06	0.40 KWD	3.85	39.71
Consumer services	767.37	-1.41	0.40	-2.14	-2.14	2.82	0.53 KWD	0.97	10.03
Insurance	1,404.04	3.27	2.05	1.34	1.34	21.44	0.52 KWD	0.89	9.30
Consumer Disc	1,012.16	-0.63	1.25	3.87	3.87	23.65	0.24 KWD	1.34	8.73
Energy	1,452.37	-0.37	1.74	1.54	1.54	13.70	0.30 KWD	1.06	14.51
Technology	778.43	4.90	0.00	-5.31	-5.31	54.85	0.01 KWD	0.86	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)	10,916.67	0.17	1.16	-0.58	-0.58	25.67	9,635 SAR	2.82	21.95
Qatar (QE Index)	10,668.40	-0.10	-0.14	-0.46	-0.46	2.35	544 QAR	1.52	19.41
Dubai (DFMGI)	2,761.42	0.09	0.63	-1.75	-1.75	10.81	304 AED	1.64	11.76
Abu Dhabi (ADI)	7,170.96	0.03	1.50	4.91	4.91	42.13	1,005 AED	1.97	11.50
Bahrain (BAX)	1,594.39	-0.14	0.97	0.40	0.40	7.02	16 BHD	1.25	23.46
MUSCAT SE INDEX	4,016.58	0.27	-1.44	-1.15	-1.15	9.78	5 OMR	0.88	13.25
Developed Markets									
MSCI World Index	3,068.87	-0.37	0.26	2.09	2.09	14.51			
U.S. (S&P 500)	4,401.46	-0.47	0.24	2.90	2.90	17.74			
U.K. (FTSE 100)	6,996.08	-0.42	-0.33	-0.47	-0.47	8.42			
Japan (Topix)	1,938.04	0.64	1.77	-0.28	-0.28	7.39			
Emerging Markets									
MSCI EM Index	1,252.43	-2.15	-2.39	-6.89	-6.89	-0.87			
China (SSE Composite)	3,381.18	-2.49	-4.77	-5.85	-5.85	-2.65			
India (Sensex)	52,578.76	-0.52	-0.73	0.20	0.20	10.13			



What Move the GCC markets ,

Oil Prices

Oil prices were steady on Tuesday with investors betting tight supply and rising vaccination rates will help offset any impact on demand due to surging Covid-19 cases worldwide, Brent crude futures climbed 26 cents, or 0.35%, to \$74.76 per barrel.

Kuwait Market

The market closed up by 0.10%, value traded 60.2 million KD, Premier market value traded reached 33.2 million KD and closed at 7,104 change by 0.14%.

Saudi Market

The Market closed up today by 0.17%, today market Performance is linked to oil prices raised to \$74.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



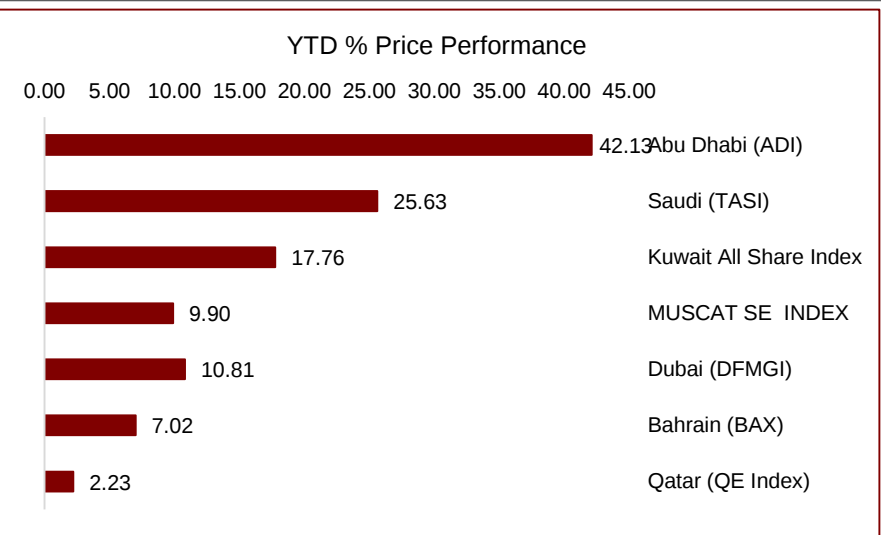
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.888	-0.11	3.74	4.48	4.48	10.88	6.39 KWD	1.69	27.00
KFH	0.774	0.13	1.57	2.11	2.11	25.92	6.53 KWD	3.47	32.00
Zain	0.592	0.34	1.54	0.68	0.68	-2.15	2.55 KWD	2.21	13.63
BOUBAYAN BANK	0.782	1.96	7.12	6.83	6.83	44.56	2.44 KWD	3.52	34.00
Agility	0.954	0.74	1.38	3.70	3.70	54.91	2.11 KWD	1.73	47.01
Saudi Arabia									
ARAMCO	34.70	-0.14	-0.43	-1.00	-1.00	-0.71	6,949.63 SAR	6.87	34.87
SABIC	120.40	0.33	0.84	-1.48	-1.48	18.34	359.98 SAR	2.10	35.00
STC	129.40	1.89	1.90	-2.28	-2.28	21.32	253.99 SAR	3.90	22.87
AL-RAJHI BANK	109.40	-0.55	1.48	-1.08	-1.08	49.18	274.99 SAR	4.64	23.68
NCB	54.90	0.92	-1.26	-4.86	-4.86	26.41	243.59 SAR	1.96	14.00
United Arab Emirates									
ETISALAT.AD	22.70	0.00	1.79	3.18	3.18	34.32	197.42 AED	4.42	21.46
FAB.AD	16.26	-0.25	-0.25	-2.63	-2.63	26.05	178.00 AED	1.73	17.31
EMIRATES NBD	13.50	1.12	3.05	1.89	1.89	31.07	84.33 AED	1.02	12.88
DB ISLAMIC BK	4.74	-0.42	-0.42	-1.66	-1.66	2.82	34.47 AED	0.95	13.92
EMAAR PROPERT	3.95	0.51	0.25	-5.05	-5.05	11.90	28.14 AED	0.50	11.41
Qatar									
QNB	18.06	0.33	1.46	0.61	0.61	1.29	166.26 QAR	1.72	14.60
INDUSTRIES QAT	13.08	-0.15	0.30	-0.08	-0.08	21.80	79.26 QAR	2.38	24.50
QA ISLAMIC BK	17.05	0.89	0.18	-1.39	-1.39	-0.35	39.93 QAR	1.74	13.18
MASRAF AL RAYA	4.41	-0.34	0.23	-1.10	-1.10	-2.65	33.19 QAR	2.33	14.85
MESAIEED PETRO	1.88	-0.90	0.32	-0.05	-0.05	-8.11	23.84 QAR	1.53	27.91
OMAN									
BANK MUSCAT	0.450	-0.44	-0.87	7.08	7.08	26.11	1.62 OMR	0.80	8.33
OMANTEL	0.780	0.00	-1.02	-2.51	-2.51	7.18	0.59 OMR	1.09	7.69
BANK DHOFAR	0.124	-1.59	-1.59	-0.80	-0.80	27.84	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
14-Jul-21	20.01%	12.74%	0.06%	0.41%	0.37%	4.66%	2.56%	10.54%	5.04%	4.08%
21-Jul-21	20.02%	12.78%	0.06%	0.41%	0.37%	4.66%	2.55%	10.55%	5.05%	4.08%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is up today by + 0.1 %The leading sector best performance indices today are Insurance 3.27 % Basic materials 0.22 % Real estate 0.22 % respectively

from YTD performance perspective the best sector performance is Financial services by 31.08 % while the bottom sector performance is Utilities by -19.13 %

Telecommunication sector are up today by + 0.08 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-19.41 %

KSA

Saudi Armco has negative performance today by - 0.14 %, SABIC has positive performance today by + 0.33 %

STC has a positive performance today by + 1.89 %, Al Rajhi Bank have negative performance today by -0.55 %

UAE

ETISALAT AD closed flat today , and act defensively with COVID19



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NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw