



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MORNING BRIEF

Wednesday, April 28, 2021

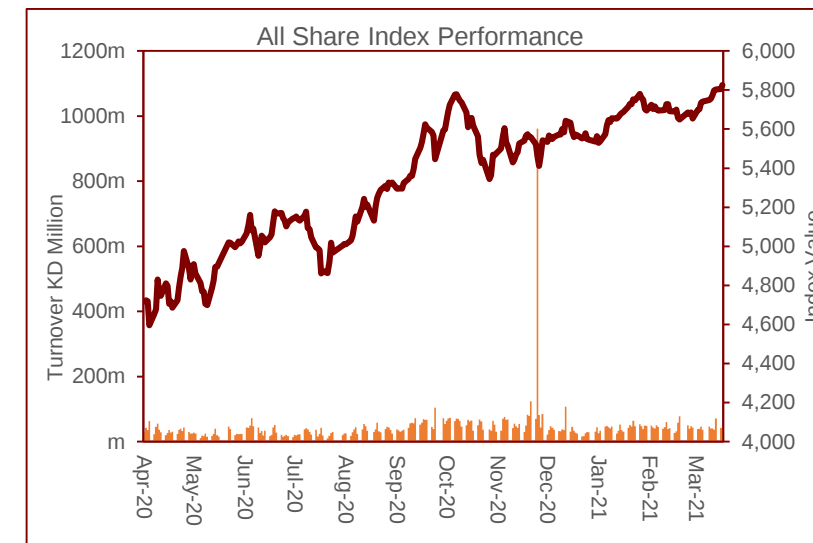


Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,131.14	0.94	1.69	6.15	6.15	10.55	36.06 KWD	1.98	36.35
Kuwait Premier Index	6,658.14	0.86	1.03	5.28	5.28	10.03	27.07 KWD	2.14	34.46
Kuwait Main Index	5,104.80	1.18	3.78	8.91	8.91	12.13	8.99 KWD	1.48	42.34
NIC 50	7,453.73	0.95	0.98	5.20	5.21	10.03	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,368.19	-0.07	0.02	4.10	4.10	8.37	20.24 KWD	1.39	35.46
Telecom	1,108.71	-0.13	-0.67	-0.54	-0.54	0.58	3.40 KWD	0.59	14.12
Industrials	1,078.49	7.46	11.20	17.12	17.12	21.03	3.86 KWD	0.76	12.69
Financial services	1,119.48	0.40	2.74	13.66	13.66	20.41	2.83 KWD	0.73	5.09
Real estate	1,149.27	3.92	7.15	13.03	13.03	20.64	2.48 KWD	0.68	56.50
Basic materials	1,170.15	-1.45	-3.16	7.44	7.44	30.22	1.04 KWD	1.82	24.05
Health care	792.52	0.04	0.04	-2.19	-2.19	-4.13	0.39 KWD	4.23	40.51
Consumer services	731.05	0.66	1.43	3.29	3.29	-2.05	0.45 KWD	0.85	9.37
Insurance	1,265.42	-1.14	2.06	5.36	5.36	9.45	0.47 KWD	0.87	8.61
Consumer Disc	871.29	2.94	6.08	3.04	3.04	6.44	0.22 KWD	1.29	28.18
Energy	1,305.09	-0.39	2.30	6.51	6.51	2.17	0.27 KWD	0.83	14.54
Technology	778.43	1.90	12.63	30.49	30.49	54.85	0.01 KWD	0.89	0.00
Utilities	668.42	0.00	-4.87	-5.22	-5.22	-8.30	0.28 KWD	6.89	23.05

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,531.22	2.57	3.92	6.29	6.29	21.19	9,608 SAR	2.51	22.20
Qatar (QE Index)	10,940.58	-0.26	0.65	4.94	4.94	4.59	557 QAR	1.63	17.72
Dubai (DFMGI)	2,620.08	-0.38	-0.21	2.74	2.74	5.14	289 AED	1.32	31.28
Abu Dhabi (ADI)	6,083.28	-0.60	-0.30	2.89	2.89	20.57	882 AED	1.67	18.40
Bahrain (BAX)	1,486.19	0.20	-0.01	1.93	1.93	-0.24	15 BHD	1.32	11.16
MUSCAT SE INDEX	3,734.88	0.47	0.42	0.71	0.71	2.08	5 OMR	0.82	13.25
Developed Markets									
MSCI World Index	2,952.01	-0.14	0.20	4.99	4.99	9.74			
U.S. (S&P 500)	4,186.72	0.33	0.16	5.38	5.38	11.47			
U.K. (FTSE 100)	6,981.90	0.53	0.62	4.00	4.00	8.07			
Japan (Topix)	1,909.06	0.29	-0.31	-2.30	-2.30	5.78			
Emerging Markets									
MSCI EM Index	1,361.96	0.10	0.66	3.46	3.46	5.47			
China (SSE Composite)	3,457.07	0.42	-0.49	0.44	0.44	-0.46			
India (Sensex)	49,733.84	1.61	3.88	0.45	0.45	4.15			

Sources, Bursa Kuwait , Refinitiv , NIC.



What Move the GCC markets ,

Oil Prices

Oil prices dropped on Wednesday, paring overnight gains, with soaring COVID-19 cases in India and a bigger-than-expected build in U.S. crude stocks offsetting confidence shown by OPEC and its allies in a solid recovery in global fuel demand. Brent crude futures fell 26 cents, or 0.4%, to \$66.16 a barrel.

Kuwait Market

The market closed today up by 0.94%, value traded 83.5 million KD, Premier market value traded reach 44.5 million KD and closed at 6,658 change by 0.86%.

Saudi Market

The Market closed up by 2.57 %, today market Performance are linked to oil prices raised to \$66.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



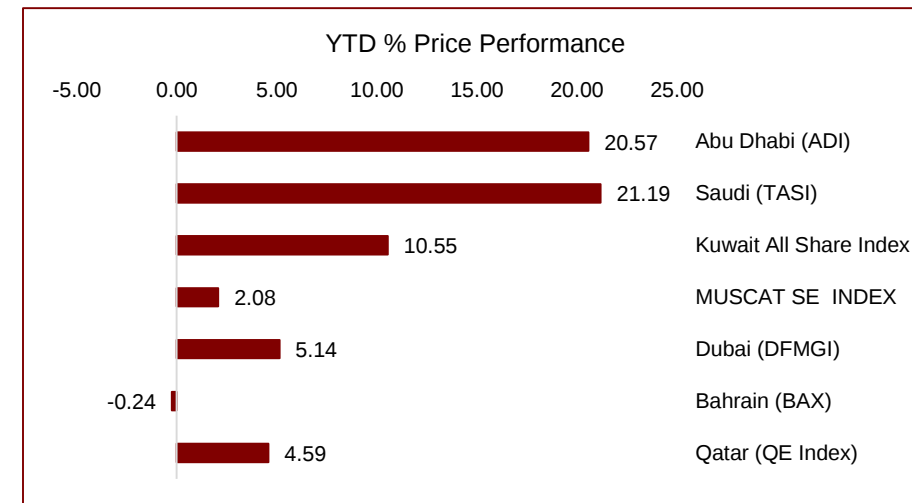
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.828	-0.12	0.00	2.60	2.60	3.50	5.96 KWD	1.54	27.00
KFH	0.729	0.00	0.00	4.41	4.41	18.45	6.15 KWD	3.15	32.00
Zain	0.605	0.17	-0.49	0.00	0.00	-0.16	2.62 KWD	1.99	14.12
BOUBYAN BANK	0.655	0.15	0.46	13.68	13.68	21.08	2.08 KWD	3.42	34.00
Agility	0.980	15.29	27.77	34.99	34.99	44.97	1.99 KWD	1.64	39.94
Saudi Arabia									
ARAMCO	35.80	1.13	1.13	-0.56	-0.56	2.29	7,079.62 SAR	7.14	38.26
SABIC	127.80	6.50	6.68	8.86	8.86	26.04	359.98 SAR	2.15	35.00
STC	127.60	1.11	1.75	0.63	0.63	20.38	252.39 SAR	3.94	23.00
AL-RAJHI BANK	102.00	4.29	5.37	3.24	3.24	38.59	244.49 SAR	4.21	21.23
NCB	57.90	6.43	7.82	9.04	9.04	33.56	243.59 SAR	2.05	13.91
United Arab Emirates									
ETISALAT.AD	21.30	-0.65	-0.28	-1.57	-1.57	26.04	185.24 AED	3.78	20.66
FAB.AD	14.38	-1.24	-0.55	-1.51	-1.51	11.47	157.03 AED	1.53	15.47
EMIRATES NBD	12.50	1.21	4.17	8.70	8.70	21.36	78.96 AED	0.96	11.92
DB ISLAMIC BK	4.47	-0.89	-1.11	-1.76	-1.76	-3.04	32.37 AED	0.80	11.87
EMAAR PROPERT	3.76	-1.57	-2.84	6.21	6.21	6.52	26.92 AED	0.47	10.45
Qatar									
QNB	18.00	0.06	0.28	0.06	0.06	0.95	166.26 QAR	1.80	15.46
INDUSTRIES QAT	13.60	-0.58	4.56	13.14	13.14	24.38	82.28 QAR	2.48	25.58
QA ISLAMIC BK	17.39	-0.06	-0.34	5.65	5.65	1.64	41.09 QAR	1.86	14.07
MASRAF AL RAYA	4.47	-0.04	-0.13	4.06	4.06	-1.46	33.51 QAR	2.45	15.21
MESAIEED PETRO	1.95	-0.86	4.89	4.89	4.89	-4.69	24.51 QAR	1.57	46.42
OMAN									
BANK MUSCAT	0.388	0.00	0.52	1.56	1.56	8.33	1.39 OMR	0.69	8.33
OMANTEL	0.764	0.53	1.06	-3.55	-3.55	4.97	0.57 OMR	0.99	7.69
BANK DHOFAR	0.106	0.95	-1.85	0.00	0.00	9.28	0.32 QAR	0.46	14.93
NAT BANK OF OMAN	0.157	1.95	1.29	4.67	4.67	-1.87	0.25 QAR	0.48	12.71
OMINVEST	0.310	0.65	0.65	-3.12	-3.12	-8.28	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, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market are up today by + 0.94 % The leading sector best performance indices today are Real estate 3.92 % Consumer Disc 2.94 % Technology 1.9 % respectively

from YTD performance perspective the best sector performance are Basic materials by 30.22 % while the bottom sector performance is Utilities by -8.3 %

Telecommunication sector are down today by -0.13 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -9.94 %

KSA

Saudi Armco are have positive performance today by + 1.13 %, SABIC have positive performance today by + 6.5 %

STC are have positive performance today by + 1.11 %, Al Rajhi Bank have positive performance today by + 4.29 %

UAE

ETISALAT AD closed today down by - 0.65% and act defensively with COVID19



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