



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, September 28, 2021

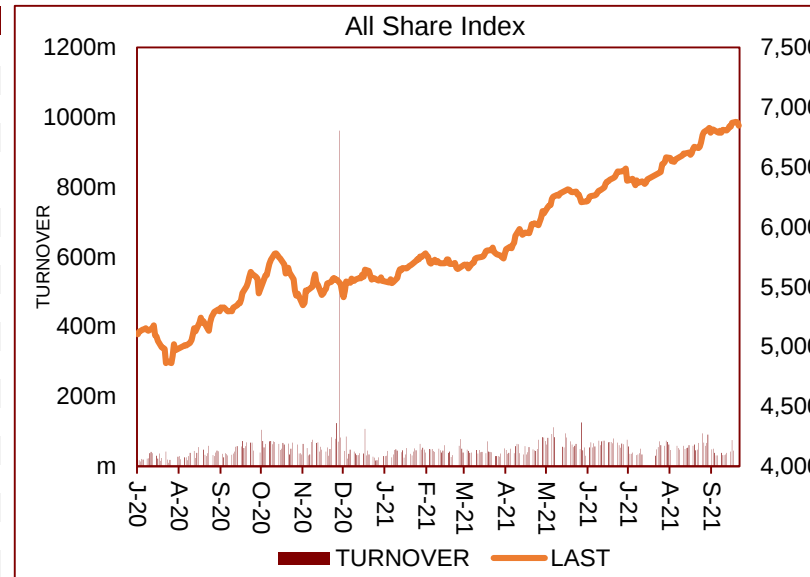




Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,874.71	0.07	-0.02	1.30	7.64	23.96	40.43 KWD	2.67	26.94
Kuwait Premier Index	7,503.21	0.01	-0.18	0.96	8.18	24.00	30.44 KWD	2.33	28.40
Kuwait Main Index	5,636.28	0.23	0.39	2.24	5.91	23.69	9.99 KWD	3.70	22.63
NIC 50	8,346.48	0.01	-0.23	0.89	8.11	24.00	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,578.94	0.12	-0.16	1.22	9.10	25.13	23.28 KWD	1.30	29.40
Telecom	1,097.04	-0.23	-0.30	-1.45	1.56	-0.45	3.37 KWD	0.71	13.06
Industrials	1,169.86	0.05	0.14	0.25	3.22	31.14	4.14 KWD	0.91	11.65
Financial services	1,324.51	0.35	1.00	5.13	14.53	42.48	3.28 KWD	0.81	10.82
Real estate	1,275.88	-0.54	-0.24	2.71	7.79	34.07	2.76 KWD	0.71	28.29
Basic materials	1,078.76	0.66	0.15	-0.65	-1.80	19.72	0.96 KWD	1.93	11.73
Health care	794.68	-0.08	0.38	0.38	0.57	-3.87	0.39 KWD	4.50	13.28
Consumer services	778.00	0.57	0.49	5.13	-0.79	4.24	0.58 KWD	1.09	10.24
Insurance	1,468.09	0.83	0.43	-0.17	5.15	26.01	0.61 KWD	0.80	9.97
Consumer Disc	1,113.30	-0.86	0.22	2.12	14.21	35.95	0.24 KWD	1.37	9.63
Energy	1,384.63	-0.46	0.98	1.88	-2.99	8.63	0.29 KWD	1.06	14.65
Technology	714.41	0.00	-1.80	-2.00	-13.10	42.11	0.01 KWD	0.84	0.00
Utilities	623.68	0.00	0.00	1.72	3.95	-14.44	0.26 KWD	4.96	20.50

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,382.41	0.12	1.43	0.99	4.07	30.99	9,838 SAR	2.74	20.96
Qatar (QE Index)	11,386.45	0.66	1.31	2.65	6.12	9.11	575 QAR	1.77	16.64
Dubai (DFMGI)	2,830.71	0.48	-0.31	-2.49	0.72	13.59	310 AED	1.57	19.41
Abu Dhabi (ADI)	7,756.31	0.06	-0.88	0.93	13.47	53.73	1,341 AED	1.77	24.49
Bahrain (BAX)	1,701.79	0.22	-0.04	3.43	7.17	14.23	17 BHD	1.17	11.06
MUSCAT SE INDEX	3,952.13	0.53	0.64	-0.37	-2.74	8.02	5 OMR	0.90	13.25
Developed Markets									
MSCI World Index	3,032.70	-2.03	-0.26	-1.46	2.60	15.07			
U.S. (S&P 500)	4,352.63	-2.04	-0.28	-1.76	3.39	18.29			
U.K. (FTSE 100)	7,028.10	-0.50	-0.32	-1.28	-0.13	8.79			
Japan (Topix)	2,081.77	-0.29	-0.43	6.17	7.11	15.35			
Emerging Markets									
MSCI EM Index	1,260.89	-0.51	0.18	-3.16	-7.80	-1.85			
China (SSE Composite)	3,602.22	0.54	-0.30	1.64	0.31	3.72			
India (Sensex)	59,667.60	-0.68	-0.73	3.58	13.58	24.83			



What Move the GCC markets ,

Oil Prices

Oil markets climbed for a sixth day on Tuesday, reversing earlier losses, on fears over tight supply while surging prices of liquefied natural gas (LNG) and coal also lent support, Brent crude futures gained \$1.05, or 1.3%, to \$80.58 a barrel.

Kuwait Market

The market closed up today by + 0.07%, value traded 52.8 million KD, Premier market value traded reached 19.2 million KD and closed at 7,503 up by + 0.01%.

Saudi Market

The Market closed up today by + 0.12%, with positive macroeconomic sentiments bounce of oil reaching \$80.58 or +1.3%.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



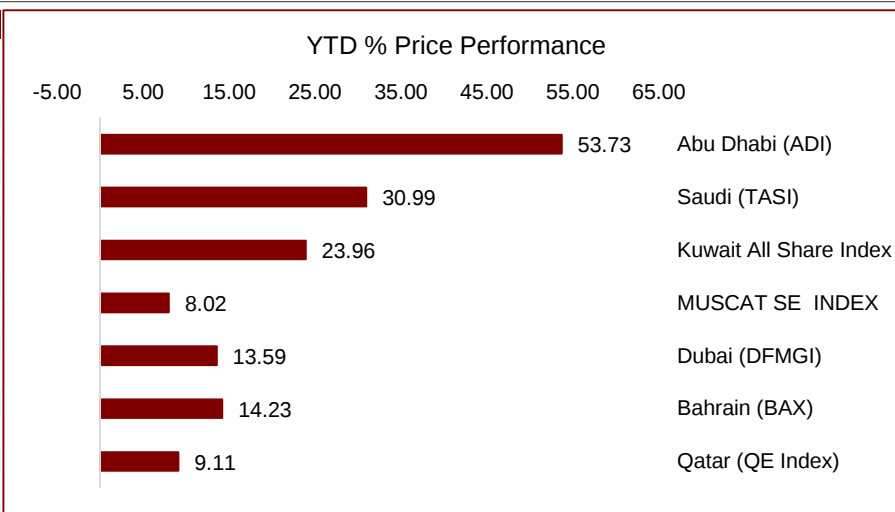
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.956	0.00	-0.42	2.14	12.60	19.50	6.87 KWD	1.82	27.00
KFH	0.823	-0.12	-0.12	-0.24	8.56	33.88	6.95 KWD	3.29	32.00
Zain	0.599	-0.33	-0.17	-1.64	2.04	-0.83	2.60 KWD	2.25	13.88
BOUBYAN BANK	0.771	0.13	-0.13	-1.66	5.19	42.34	2.45 KWD	3.54	34.00
Agility	0.987	-0.30	-0.20	-1.20	7.52	60.61	2.21 KWD	1.78	27.63
Saudi Arabia									
ARAMCO	36.35	3.56	4.29	3.70	3.85	4.14	7,020.56 SAR	6.82	26.42
SABIC	128.80	0.63	7.04	6.34	7.39	28.99	384.03 SAR	2.27	35.00
STC	124.60	-1.58	-3.98	-7.11	-4.71	18.30	253.22 SAR	3.96	23.17
AL-RAJHI BANK	121.40	0.00	0.33	0.33	9.37	64.95	303.52 SAR	5.09	23.94
NCB	60.50	0.50	1.00	-0.66	4.86	39.33	269.60 SAR	1.67	16.51
United Arab Emirates									
ETISALAT.AD	24.16	-0.74	-1.63	2.37	9.82	42.96	211.69 AED	4.49	22.99
FAB.AD	18.28	0.77	-0.65	7.53	9.46	41.71	198.09 AED	1.87	18.42
EMIRATES NBD	14.05	1.81	0.36	1.44	6.04	36.41	87.17 AED	1.04	12.50
DB ISLAMIC BK	4.96	0.40	0.81	-2.75	2.90	7.59	35.77 AED	0.97	14.97
EMAAR PROPERT	4.02	-0.25	-1.23	-4.29	-3.37	13.88	28.85 AED	0.51	13.29
Qatar									
QNB	19.00	0.00	-0.52	-0.89	5.85	6.56	175.51 QAR	1.82	15.42
INDUSTRIES QAT	15.02	3.59	5.78	16.73	13.21	37.99	87.73 QAR	2.48	17.45
QA ISLAMIC BK	18.15	0.17	0.95	-0.82	4.97	6.08	42.82 QAR	1.86	14.14
MASRAF AL RAYA	4.45	0.07	-0.02	-2.31	-0.31	-1.88	33.32 QAR	2.34	14.91
MESAIEED PETRO	2.26	-0.40	1.85	13.05	20.14	10.45	28.52 QAR	1.76	21.83
OMAN									
BANK MUSCAT	0.446	0.45	0.91	1.36	5.19	23.89	1.59 OMR	0.77	8.33
OMANTEL	0.756	2.16	0.53	-0.53	-5.53	3.87	0.55 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	0.186	0.00	0.54	-1.06	-7.00	16.25	0.30 QAR	0.55	12.71
OMINVEST	0.308	-1.28	0.00	-2.52	-0.64	-8.28	0.25 QAR	0.93	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, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is up today by + 0.07 %The leading sector best performance indices today are Basic materials 0.66 % Consumer services 0.57 % Financial services 0.35 % respectively

The market is up today by + 0.58 %The leading sector best performance indices today are Consumer Disc 0.89 % Industrials 0.62 % Consumer services 0.54 % respectively

Telecommunication sector are down today by -0.23 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-24.41 %

KSA

Saudi Armco has a positive performance today by + 3.5 %, SABIC have positive performance today by + 0.63 %

STC has a negative performance today by -1.58 %, Al Rajhi Bank has flat performance today

UAE

ETISALAT AD closed down today by - 0.74%, and act defensively with COVID19



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