

شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, November 29, 2021



DAILY MARKETS WRAP,

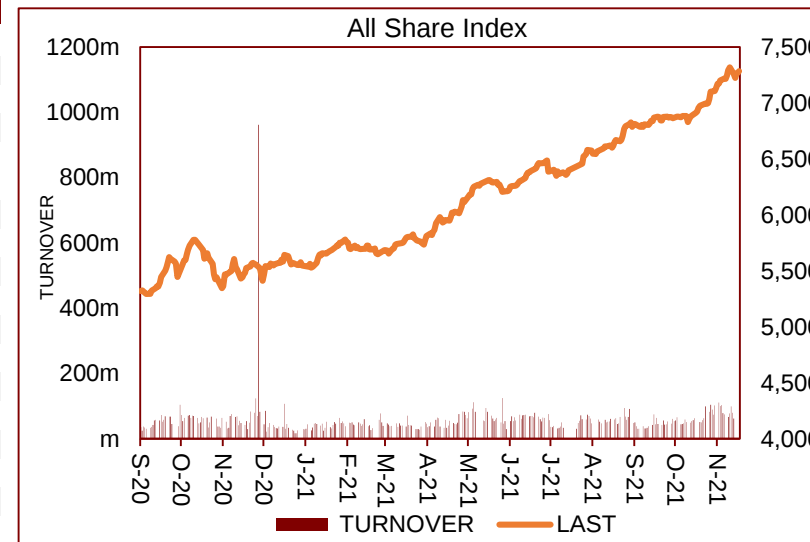
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Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,951.47	0.33	-2.46	-2.18	1.28	25.37	41.16 KWD	2.04	25.61
Kuwait Premier Index	7,550.15	0.50	-2.20	-1.85	0.72	24.77	30.79 KWD	2.20	26.09
Kuwait Main Index	5,785.16	-0.18	-3.32	-3.23	2.96	27.07	10.36 KWD	1.53	24.28
NIC 50	8,852.99	0.44	-2.25	-1.93	0.65	24.77	28.60 KWD	2.18	25.09
Kuwait Sector									
Banking	1,599.16	0.46	-1.99	-1.28	1.45	26.67	23.70 KWD	1.24	27.09
Telecom	1,080.23	0.27	-0.96	-2.08	-1.40	-2.00	3.30 KWD	0.90	15.02
Industrials	1,150.98	0.45	-3.62	-4.33	-1.38	29.16	4.06 KWD	0.92	14.02
Financial services	1,376.68	0.10	-3.91	-4.28	4.38	48.08	3.55 KWD	0.82	11.59
Real estate	1,309.15	0.74	-3.92	-4.39	2.32	37.42	2.80 KWD	0.72	51.04
Basic materials	1,030.14	-0.62	-3.14	-6.31	-5.38	14.64	0.93 KWD	1.79	27.78
Health care	792.23	-0.83	-0.83	-0.33	-0.46	-4.16	0.40 KWD	6.16	12.15
Consumer services	739.97	0.14	-0.51	-4.64	-5.56	-0.86	0.66 KWD	0.85	15.51
Insurance	1,585.15	-0.13	-0.57	7.29	9.32	37.10	0.66 KWD	0.79	8.35
Consumer Disc	1,223.06	-3.09	-8.47	-3.24	9.48	49.41	0.23 KWD	1.35	9.03
Energy	1,412.54	0.79	-2.87	-3.18	2.59	10.59	0.29 KWD	1.03	15.11
Technology	778.43	0.94	0.94	0.94	8.96	54.85	0.01 KWD	0.91	0.00
Utilities	618.42	0.00	-1.67	-0.42	-0.84	-15.16	0.26 KWD	4.15	19.88

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,810.60	0.21	-4.16	-7.47	-5.79	24.63	9,684 SAR	2.36	18.28
Qatar (QE Index)	11,471.36	0.06	-2.53	-2.31	0.07	10.13	576 QAR	1.62	15.73
Dubai (DFMGI)	3,059.94	1.78	-3.48	6.83	7.54	22.79	303 AED	1.51	22.61
Abu Dhabi (ADI)	8,478.60	2.15	0.29	7.80	10.13	68.05	1,423 AED	1.80	22.80
Bahrain (BAX)	1,753.99	0.54	-1.42	0.63	2.84	17.73	18 BHD	1.56	9.77
MUSCAT SE INDEX	4,118.22	0.28	1.34	1.06	4.46	12.56	5 OMR	0.88	13.25
Developed Markets									
MSCI World Index	3,131.98	-2.20	0.00	-1.35	4.17	16.43			
U.S. (S&P 500)	4,594.62	0.33	-2.20	-0.23	6.66	22.33			
U.K. (FTSE 100)	7,119.98	1.08	1.08	-1.62	0.47	10.21			
Japan (Topix)	1,948.48	-1.84	-1.84	-2.63	-4.02	7.97			
Emerging Markets									
MSCI EM Index	1,223.13	-2.52	0.00	-3.29	-2.39	-5.28			
China (SSE Composite)	3,562.70	-0.04	-0.04	0.43	-0.15	2.58			
India (Sensex)	57,260.58	0.27	0.21	-3.50	-3.21	19.85			



What Move the GCC markets ,

Oil Prices

Oil prices rose on Monday, recouping some losses after Friday's plunge of about \$10 a barrel, as investors looked for bargains but remained cautious with the focus on the omicron coronavirus variant and Iran nuclear deal negotiations, Brent crude futures climbed \$3.05, or 4.2%, to \$75.77 a barrel.

Kuwait Market

The market closed today up by +0.33%, value traded 56.0 million KD, Premier market value traded reached 35.6 million KD and closed at 7,550.15 up by +0.50%.

Saudi Market

The Market closed up by +0.21%, with positive macroeconomic sentiments bounce of oil reaching \$75.77.

DAILY MARKETS WRAP,

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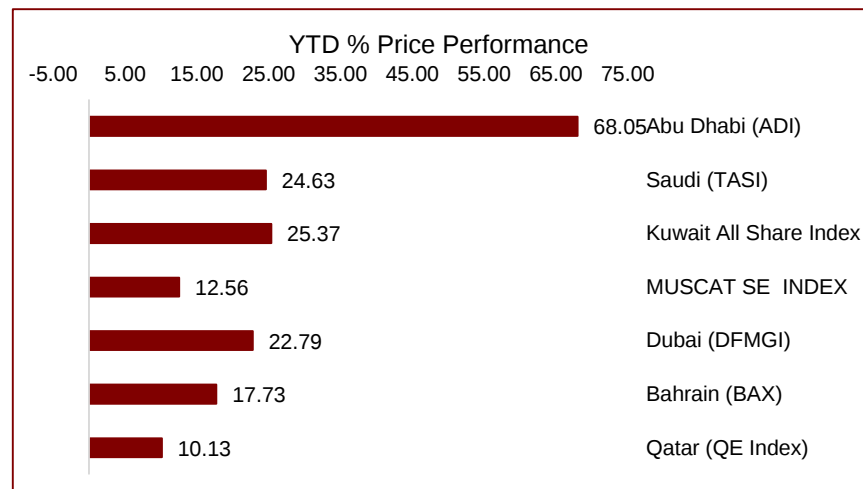
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.998	0.30	-1.77	0.91	4.83	24.88	7.16 KWD	1.85	27.00
KFH	0.819	0.61	-1.68	-1.91	-0.24	33.23	6.87 KWD	3.16	32.00
Zain	0.586	0.51	-0.34	-1.84	-1.84	-2.97	2.52 KWD	2.12	13.35
BOUBYAN BANK	0.782	-0.64	-1.38	-0.13	2.08	44.93	2.50 KWD	3.57	34.00
Agility	0.956	0.84	-4.11	-3.24	-2.94	55.56	2.12 KWD	0.97	2.02
Saudi Arabia									
ARAMCO	34.90	0.00	-1.69	-7.65	-2.78	0.00	6,980.19 SAR	6.53	21.54
SABIC	111.20	-0.71	-7.37	-12.78	-13.19	9.07	336.01 SAR	1.93	35.00
STC	111.00	-0.54	-0.35	-2.26	-11.34	6.23	223.21 SAR	3.25	20.01
AL-RAJHI BANK	135.00	0.90	-4.53	-2.88	10.11	83.42	334.51 SAR	5.26	25.51
NCB	60.60	-0.66	-5.60	-6.90	-1.14	40.02	273.17 SAR	1.69	18.65
United Arab Emirates									
ETISALAT.AD	31.00	5.80	2.31	21.09	29.06	83.43	254.81 AED	5.53	27.61
FAB.AD	19.00	0.53	-0.84	6.74	6.86	47.29	206.38 AED	1.89	16.98
EMIRATES NBD	12.80	-0.78	-2.66	-6.91	-9.86	24.27	81.48 AED	0.95	10.21
DB ISLAMIC BK	5.31	3.31	-0.75	3.91	7.27	15.18	37.22 AED	0.98	13.71
EMAAR PROPERT	4.61	3.60	-6.11	14.11	12.99	30.59	36.40 AED	0.56	11.55
Qatar									
QNB	19.50	-2.50	-5.05	-4.12	2.14	9.70	184.73 QAR	1.84	15.69
INDUSTRIES QAT	14.95	1.29	-3.05	-7.72	-3.24	37.53	89.30 QAR	2.39	13.40
QA ISLAMIC BK	17.81	-0.11	-1.43	-1.76	-2.03	4.50	42.13 QAR	1.76	13.30
MASRAF AL RAYA	4.70	0.43	-1.71	0.38	5.34	4.15	35.10 QAR	2.37	15.76
MESAIEED PETRO	2.13	0.90	-3.57	-3.09	-5.54	4.15	26.52 QAR	1.59	16.18
OMAN									
BANK MUSCAT	0.506	0.00	2.01	4.53	12.89	41.11	1.82 OMR	0.86	8.33
OMANTEL	0.744	1.09	-0.54	-3.66	-0.54	1.66	0.55 OMR	0.98	7.69
BANK DHOFAR	0.133	0.00	0.76	2.31	13.68	37.11	0.40 QAR	0.56	14.93
NAT BANK OF OMAN	0.194	0.00	2.65	0.00	4.86	21.25	0.32 QAR	0.57	12.71
OMINVEST	0.312	0.00	-0.64	0.65	-0.64	-7.69	0.25 QAR	0.91	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
17-Nov-21	20.92%	11.68%	0.06%	0.29%	0.41%	4.63%	2.76%	10.64%	5.28%	4.33%
24-Nov-21	20.96%	11.72%	0.06%	0.30%	0.42%	4.61%	2.76%	10.61%	5.30%	4.36%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is up today by + 0.33 %The leading sector best performance indices today are Energy 0.79 % Real estate 0.74 % Banking 0.46 % respectively

Telecommunication sector are up today by + 0.27 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-27.37 %

KSA

Saudi Armco has a flat performance today, SABIC has a negative performance today by -0.71 %

STC has a negative performance today by – 0.54 %, Al Rajhi Bank has a positive performance today by 0.90 %

UAE

ETISALAT AD closed up today by + 5.80 %, and act defensively with COVID19



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