



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MORNING BRIEF

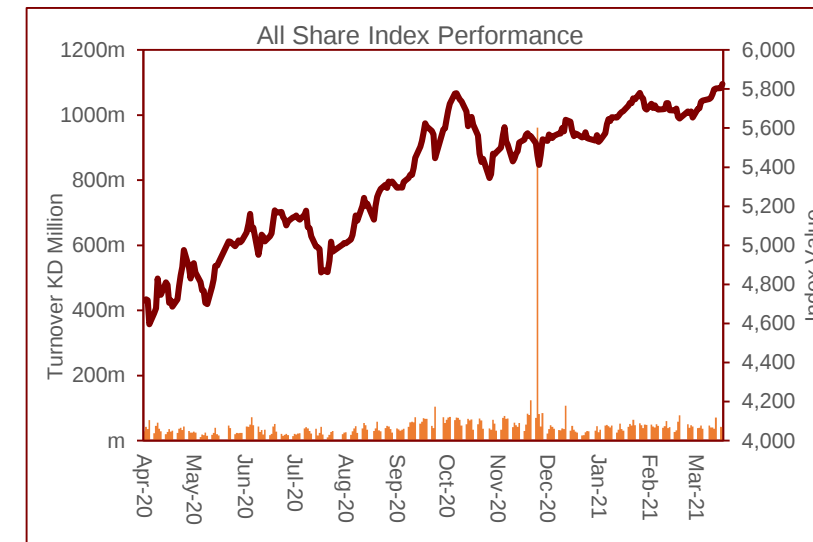
Thursday, April 29, 2021



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,113.60	-0.29	1.40	5.85	5.85	10.23	35.94 KWD	1.97	38.05
Kuwait Premier Index	6,623.17	-0.53	0.50	4.72	4.72	9.45	26.90 KWD	2.12	34.79
Kuwait Main Index	5,127.49	0.44	4.24	9.39	9.39	12.63	9.04 KWD	1.48	48.02
NIC 50	7,420.33	-0.45	0.45	4.65	4.65	9.45	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,362.50	-0.42	-0.39	3.67	3.67	7.92	20.13 KWD	1.39	35.79
Telecom	1,106.45	-0.20	-0.87	-0.74	-0.74	0.38	3.39 KWD	0.60	14.14
Industrials	1,064.64	-1.28	9.77	15.61	15.61	19.47	3.81 KWD	0.76	12.97
Financial services	1,122.70	0.29	3.03	13.99	13.99	20.76	2.84 KWD	0.76	5.01
Real estate	1,149.37	0.01	7.16	13.04	13.04	20.65	2.48 KWD	0.68	61.51
Basic materials	1,177.95	0.67	-2.51	8.16	8.16	31.09	1.05 KWD	1.83	23.83
Health care	793.32	0.10	0.14	-2.09	-2.09	-4.03	0.39 KWD	4.43	40.51
Consumer services	739.55	1.16	2.61	4.49	4.49	-0.91	0.47 KWD	0.94	9.64
Insurance	1,263.83	-0.13	1.93	5.23	5.23	9.31	0.47 KWD	0.88	8.47
Consumer Disc	903.19	3.66	9.96	6.82	6.82	10.33	0.23 KWD	1.30	28.35
Energy	1,307.12	0.16	2.46	6.68	6.68	2.33	0.27 KWD	0.85	14.31
Technology	778.43	0.00	12.63	30.49	30.49	54.85	0.01 KWD	0.89	0.00
Utilities	671.05	0.00	-4.49	-4.85	-4.85	-7.94	0.28 KWD	6.92	22.78

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,418.98	-1.07	2.81	5.16	5.16	19.90	9,765 SAR	2.49	21.75
Qatar (QE Index)	10,911.40	-0.27	0.61	4.90	4.90	4.56	555 QAR	1.61	19.25
Dubai (DFMGI)	2,605.38	-0.56	-0.77	2.16	2.16	4.55	288 AED	1.31	31.23
Abu Dhabi (ADI)	6,046.81	-0.60	-0.90	2.27	2.27	19.85	877 AED	1.67	18.47
Bahrain (BAX)	1,484.85	-0.09	-0.10	1.84	1.84	-0.33	15 BHD	1.32	11.23
MUSCAT SE INDEX	3,761.01	0.70	1.12	1.41	1.41	2.79	5 OMR	0.82	13.25
Developed Markets									
MSCI World Index	2,951.88	0.00	0.20	4.99	4.99	9.73			
U.S. (S&P 500)	4,183.18	0.33	0.07	5.29	5.29	11.37			
U.K. (FTSE 100)	7,005.34	0.60	0.96	4.34	4.34	8.43			
Japan (Topix)	1,909.06	0.29	-0.31	-2.30	-2.30	5.78			
Emerging Markets									
MSCI EM Index	1,364.96	0.22	0.88	3.69	3.69	5.71			
China (SSE Composite)	3,474.90	0.52	0.02	0.96	0.96	0.05			
India (Sensex)	49,765.94	0.06	3.90	0.48	0.48	4.18			



What Move the GCC markets ,

Oil Prices

Oil prices extended gains on Thursday after rising 1% the previous session, as bullish forecasts on recovering demand this summer outweighed concerns about the impact of rising COVID-19 cases in India, Japan and Brazil. Brent crude for June rose 22 cents, or 0.3%, to \$67.49 a barrel.

Kuwait Market

The market closed today down by 0.29%, value traded 82.8 million KD, Premier market value traded reach 45.6 million KD and closed at 6,623 change by 0.53%.

Saudi Market

The Market closed down by 1.07 %, today market Performance are linked to oil prices raised to \$67.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



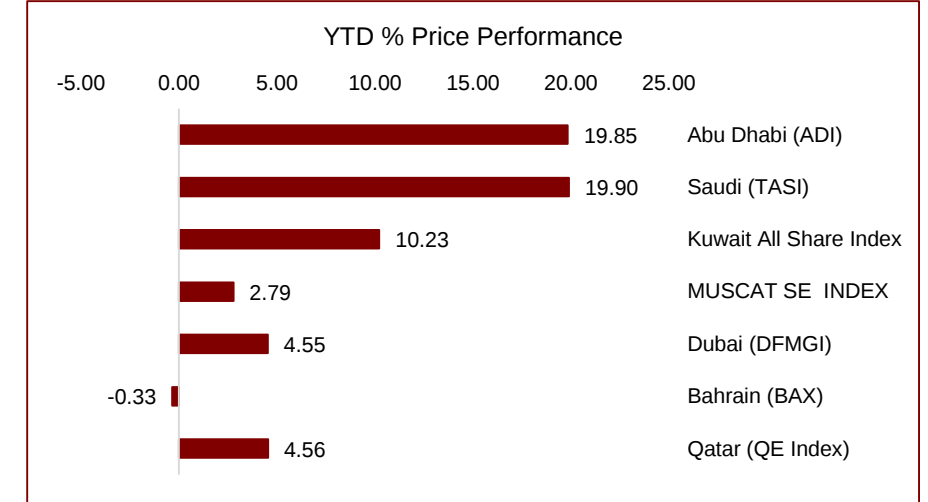
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.823	-0.60	-0.60	1.98	1.98	2.88	5.92 KWD	1.53	27.00
KFH	0.723	-0.82	-0.82	3.55	3.55	17.47	6.10 KWD	3.13	32.00
Zain	0.603	-0.33	-0.82	-0.33	-0.33	-0.49	2.61 KWD	1.98	14.14
BOUBAYAN BANK	0.655	0.00	0.46	13.68	13.68	21.08	2.08 KWD	3.42	34.00
Agility	0.948	-3.27	23.60	30.58	30.58	40.24	1.92 KWD	1.59	46.05
Saudi Arabia									
ARAMCO	35.40	-1.12	0.00	-1.67	-1.67	1.14	7,160.00 SAR	7.22	38.26
SABIC	124.00	-2.97	3.51	5.62	5.62	22.29	383.40 SAR	2.29	35.00
STC	127.00	-0.47	1.28	0.16	0.16	19.81	255.20 SAR	3.98	22.86
AL-RAJHI BANK	98.90	-3.04	2.17	0.10	0.10	34.38	255.00 SAR	4.39	21.19
NCB	56.80	-1.90	5.77	6.97	6.97	31.03	259.28 SAR	2.18	14.09
United Arab Emirates									
ETISALAT.AD	21.18	-0.56	-0.84	-2.13	-2.13	25.33	184.20 AED	4.12	20.52
FAB.AD	14.24	-0.97	-1.52	-2.47	-2.47	10.39	155.50 AED	1.51	15.28
EMIRATES NBD	12.45	-0.40	3.75	8.26	8.26	20.87	78.64 AED	0.95	12.06
DB ISLAMIC BK	4.45	-0.45	-1.55	-2.20	-2.20	-3.47	32.22 AED	0.89	13.07
EMAAR PROPERT	3.73	-0.80	-3.62	5.37	5.37	5.67	26.71 AED	0.47	10.29
Qatar									
QNB	17.90	-0.56	-0.28	-0.50	-0.50	0.39	165.33 QAR	1.79	15.47
INDUSTRIES QAT	13.48	-0.88	4.25	12.80	12.80	24.01	81.55 QAR	2.45	25.43
QA ISLAMIC BK	17.40	0.06	-0.29	5.71	5.71	1.69	41.12 QAR	1.86	14.06
MASRAF AL RAYA	4.47	0.00	-0.04	4.15	4.15	-1.37	33.51 QAR	2.45	15.21
MESAIEED PETRO	1.93	-1.08	4.30	4.30	4.30	-5.23	24.25 QAR	1.55	28.69
OMAN									
BANK MUSCAT	0.390	0.00	0.52	1.56	1.56	8.33	1.39 OMR	0.69	8.33
OMANTEL	0.772	1.58	2.66	-2.03	-2.03	6.63	0.58 OMR	1.01	7.69
BANK DHOFAR	0.109	2.83	-0.93	0.94	0.94	10.31	0.32 QAR	0.46	14.93
NAT BANK OF OMAN	0.158	1.28	1.94	5.33	5.33	-1.25	0.26 QAR	0.48	12.71
OMINVEST	0.310	0.65	0.65	-3.12	-3.12	-8.28	0.25 QAR	0.94	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

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document is confidential and may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed and others authorized to receive it.

Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market are down today by -0.29 % The leading sector bottom performance indices today are Industrials -1.28 % Banking -0.42 % Telecom -0.2 % respectively

from YTD performance prespective the best sector performance are Basic materials by 31.09 % while the bottom sector performance is Utilities by -7.94 %

Telecommunication sector are down today by -0.2 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -9.85 %

KSA

Saudi Armco are have negative performance today by -1.12 %, SABIC have negative performance today by -2.97 %

STC are have negative performance today by -0.47 %, Al Rajhi Bank have negative performance today by -3.04 %

UAE

ETISALAT AD closed today down by - 0.56% and act defensively with COVID19



شركة الاستثمار الوطنية
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