

شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

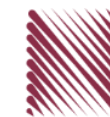


GCC DAILY MORNING BRIEF

Tuesday, June 29, 2021

DAILY MARKETS WRAP,

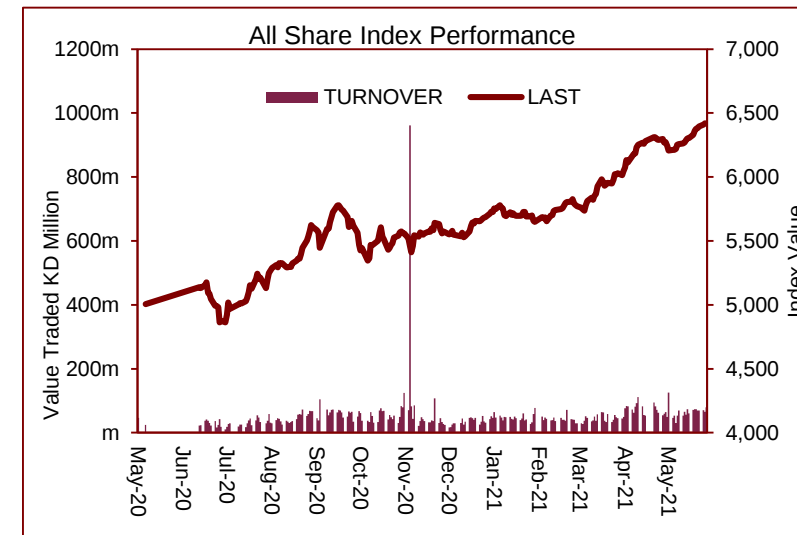
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Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,487.41	0.15	0.27	4.29	12.14	16.79	38.10 KWD	2.14	34.64
Kuwait Premier Index	7,056.98	0.10	0.36	4.48	11.34	16.37	28.61 KWD	2.30	36.49
Kuwait Main Index	5,373.49	0.31	0.00	3.72	14.67	18.07	9.48 KWD	1.63	29.25
NIC 50	7,854.19	0.05	0.31	4.40	11.27	16.37	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,475.04	0.43	0.69	5.93	11.95	16.54	21.68 KWD	1.38	37.49
Telecom	1,090.01	-0.14	1.29	0.03	-2.21	-1.12	3.35 KWD	0.63	14.19
Industrials	1,145.73	-0.46	-0.91	1.75	24.42	28.57	4.08 KWD	0.84	14.37
Financial services	1,181.80	1.08	0.55	4.25	19.99	27.11	3.03 KWD	0.78	10.69
Real estate	1,208.29	-0.24	-0.67	4.20	18.83	26.84	2.60 KWD	0.72	43.60
Basic materials	1,094.83	-3.60	-3.10	-0.93	0.53	21.84	1.01 KWD	1.99	12.56
Health care	786.49	-0.01	-0.01	-0.50	-2.93	-4.86	0.39 KWD	4.14	38.42
Consumer services	778.03	-0.74	-1.81	-0.87	9.93	4.24	0.51 KWD	0.93	9.77
Insurance	1,357.85	0.07	0.61	8.82	13.05	17.44	0.52 KWD	0.80	9.46
Consumer Disc	978.53	-0.29	-1.59	3.17	15.73	19.54	0.24 KWD	1.35	8.78
Energy	1,449.92	-0.81	-2.17	3.54	18.33	13.51	0.30 KWD	1.09	14.62
Technology	858.45	0.85	0.85	37.53	43.90	70.77	0.01 KWD	0.99	0.00
Utilities	605.26	0.00	-1.29	-4.17	-14.18	-16.97	0.26 KWD	3.65	20.73

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,996.38	0.36	0.47	3.98	10.73	26.26	9,712 SAR	2.79	22.66
Qatar (QE Index)	10,749.11	0.66	-0.16	-0.04	3.30	2.95	548 QAR	1.54	20.35
Dubai (DFMGI)	2,827.71	-0.43	-1.03	1.08	10.88	13.47	313 AED	1.42	11.79
Abu Dhabi (ADI)	6,763.08	0.21	2.84	3.12	14.38	34.05	969 AED	1.83	12.55
Bahrain (BAX)	1,596.05	0.61	1.07	4.48	9.47	7.13	17 BHD	1.25	23.10
MUSCAT SE INDEX	4,058.08	0.01	0.28	5.33	9.42	10.91	5 OMR	0.89	13.25
Developed Markets									
MSCI World Index	3,025.22	0.01	0.01	1.66	7.59	12.46			
U.S. (S&P 500)	4,290.61	0.33	0.23	2.06	8.00	14.23			
U.K. (FTSE 100)	7,092.18	0.27	-0.62	0.99	5.64	9.78			
Japan (Topix)	1,949.48	-0.82	-0.67	1.38	-0.23	8.02			
Emerging Markets									
MSCI EM Index	1,380.90	0.10	0.10	0.34	4.90	6.94			
China (SSE Composite)	3,573.18	-0.92	-0.95	-1.17	3.81	2.88			
India (Sensex)	52,549.66	-0.35	-0.67	1.22	6.18	10.09			



What Move the GCC markets ,

Oil Prices

Oil prices dropped for a second day on Tuesday on worries about slower fuel demand growth as outbreaks of the highly contagious COVID-19 variant Delta sparked new mobility restrictions around the world, Brent crude futures fell 35 cents, or 0.5%, to \$74.33 a barrel.

Kuwait Market

The market closed today up by 0.15%, value traded 63.5 million KD, Premier market value traded reached 33.7 million KD and closed at 7,056 change by 0.10%.

Saudi Market

The Market closed up today by 0.36%, today market Performance is linked to oil prices raised to \$74.

DAILY MARKETS WRAP,

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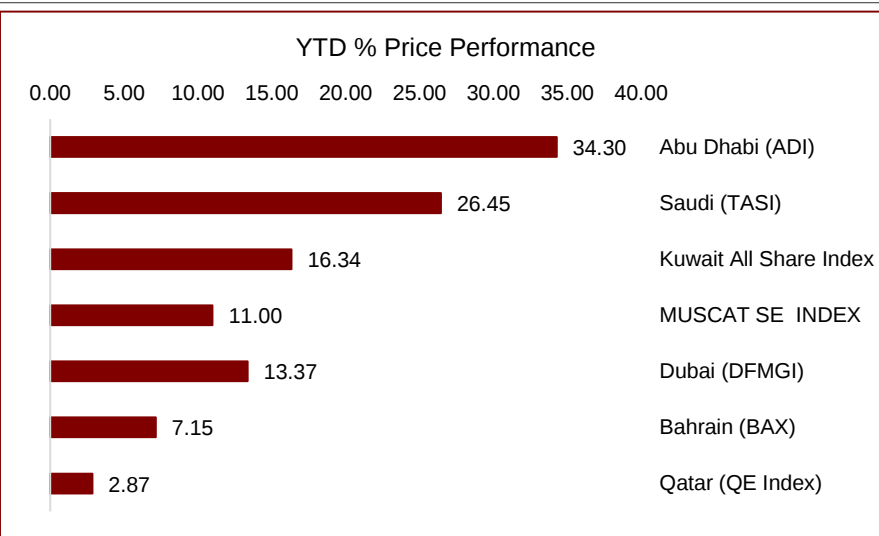
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.868	0.70	0.70	4.22	7.19	8.13	6.20 KWD	1.60	27.00
KFH	0.772	-0.26	-0.65	3.36	10.29	25.11	6.53 KWD	3.47	32.00
Zain	0.594	-0.50	1.19	-0.34	-1.98	-2.15	2.58 KWD	2.31	14.19
BOUBYAN BANK	0.756	1.61	3.29	12.37	30.86	39.38	2.36 KWD	3.88	34.00
Agility	0.937	-0.74	-1.79	1.63	41.52	51.98	2.10 KWD	1.72	46.86
Saudi Arabia									
ARAMCO	35.30	0.57	-0.14	-0.57	-2.50	0.29	7,020.19 SAR	6.94	35.12
SABIC	121.80	0.50	0.17	-2.58	3.07	19.33	363.61 SAR	2.12	35.00
STC	131.80	1.38	0.00	5.14	3.31	23.58	260.01 SAR	3.99	23.60
AL-RAJHI BANK	110.40	-0.72	0.18	7.36	12.15	50.54	278.01 SAR	4.69	23.98
NCB	58.00	1.05	0.70	8.47	8.47	32.87	257.04 SAR	2.06	15.03
United Arab Emirates									
ETISALAT.AD	22.14	-0.27	-0.27	2.22	2.31	31.01	193.07 AED	4.32	20.99
FAB.AD	16.38	0.49	0.74	-2.85	12.19	26.98	178.00 AED	1.73	17.31
EMIRATES NBD	13.40	-1.11	-2.90	-2.90	16.52	30.10	85.59 AED	1.04	13.08
DB ISLAMIC BK	4.86	0.62	-0.21	1.89	6.81	5.42	34.97 AED	0.97	14.12
EMAAR PROPERT	4.18	-0.71	-1.18	5.82	18.08	18.41	30.14 AED	0.54	12.23
Qatar									
QNB	18.08	1.01	0.00	2.15	0.50	1.40	166.91 QAR	1.79	15.39
INDUSTRIES QAT	13.25	1.07	-0.08	2.25	10.46	21.44	80.07 QAR	2.39	24.51
QA ISLAMIC BK	17.29	0.12	0.93	-0.06	5.04	1.05	41.20 QAR	1.84	13.96
MASRAF AL RAYA	4.45	0.02	0.09	0.09	3.82	-1.68	33.72 QAR	2.44	15.16
MESAIEED PETRO	1.90	0.00	-0.26	0.69	1.99	-7.33	24.10 QAR	1.53	27.94
OMAN									
BANK MUSCAT	0.420	0.00	-0.47	7.69	9.38	16.67	1.50 OMR	0.75	8.33
OMANTEL	0.784	-0.51	0.00	-0.51	-0.51	8.29	0.59 OMR	1.11	7.69
BANK DHOFAR	0.126	0.00	1.60	11.40	19.81	30.93	0.38 QAR	0.54	14.93
NAT BANK OF OMAN	0.200	1.01	1.01	19.76	33.33	25.00	0.32 QAR	0.60	12.71
OMINVEST	0.316	0.00	-0.63	-1.25	-1.25	-6.51	0.26 QAR	0.98	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
16-Jun-21	19.92%	12.77%	0.06%	0.43%	0.32%	4.89%	2.59%	10.50%	5.06%	4.11%
23-Jun-21	19.94%	12.60%	0.06%	0.42%	0.33%	4.83%	2.58%	10.55%	5.09%	4.10%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is up today by + 0.15 % The leading sector best performance indices today are Technology 0.85 % Banking 0.43 % Insurance 0.07 % respectively

from YTD performance prespective the best sector performance is Industrials by 28.57 % while the bottom sector performance is Utilities by -16.97 %

Telecommunication sector are down today by -0.14 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -17.91 %

KSA

Saudi Armco has positive performance today by +0.57 %, SABIC has positive performance today +0.50 %

STC has a positive performance today by + 1.38 %, Al Rajhi Bank have negative performance today by -0.72 %

UAE

ETISALAT AD closed down today by -0.27% , and act defensively with COVID19



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