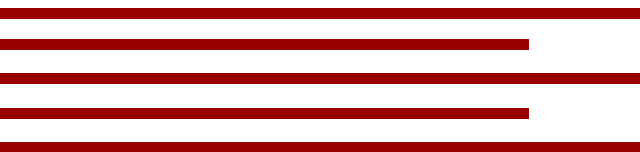


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

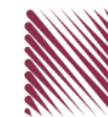


GCC DAILY MORNING BRIEF

Thursday, July 29, 2021

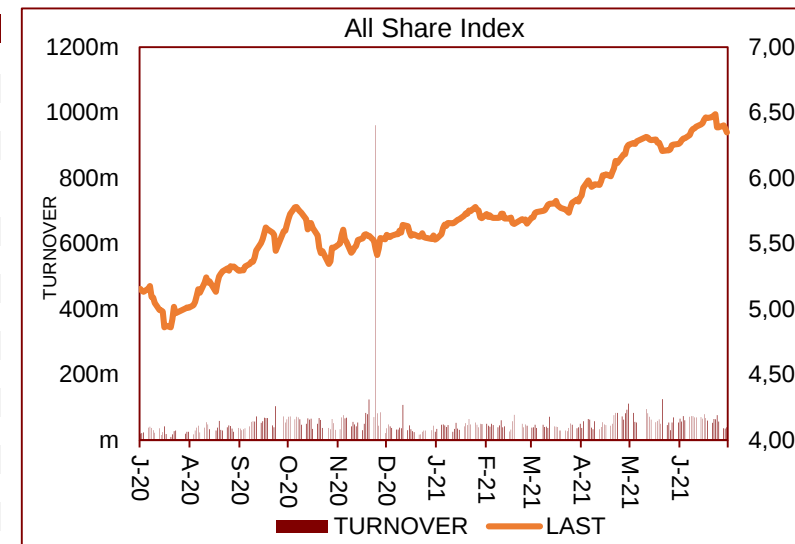
DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,581.01	0.58	2.91	3.07	3.07	18.69	38.50 KWD	2.15	34.16
Kuwait Premier Index	7,164.62	0.76	3.35	3.32	3.32	18.44	28.89 KWD	2.31	35.56
Kuwait Main Index	5,437.35	0.06	1.54	2.27	2.27	19.44	9.61 KWD	1.68	30.17
NIC 50	7,946.08	0.26	3.30	3.25	3.25	18.44	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,500.59	0.94	3.79	3.63	3.63	18.86	21.96 KWD	1.40	36.56
Telecom	1,089.91	0.43	1.58	0.88	0.88	-1.12	3.33 KWD	0.73	13.61
Industrials	1,159.62	0.62	2.66	2.43	2.43	30.13	4.09 KWD	0.84	14.35
Financial services	1,216.82	-0.15	1.32	5.21	5.21	30.88	3.08 KWD	0.79	11.82
Real estate	1,209.24	-0.47	2.04	2.05	2.05	26.94	2.61 KWD	0.70	49.33
Basic materials	1,077.06	-0.61	-0.80	-1.68	-1.68	19.86	0.97 KWD	1.95	11.61
Health care	800.77	-0.07	-0.77	1.34	1.34	-3.13	0.40 KWD	3.85	39.71
Consumer services	771.48	0.54	0.94	-1.62	-1.62	3.37	0.53 KWD	1.01	10.29
Insurance	1,404.77	-0.01	2.11	1.39	1.39	21.50	0.54 KWD	0.92	9.56
Consumer Disc	1,035.36	0.89	3.57	6.25	6.25	26.48	0.24 KWD	1.32	8.59
Energy	1,416.13	-1.82	-0.80	-0.99	-0.99	10.87	0.30 KWD	1.05	14.52
Technology	756.60	-1.89	-2.80	-7.97	-7.97	50.51	0.01 KWD	0.89	0.00
Utilities	597.37	0.00	1.34	-0.44	-0.44	-18.05	0.25 KWD	3.54	20.11



What Move the GCC markets ,

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,012.71	0.72	1.69	-0.07	-0.07	26.32	9,675 SAR	2.81	21.84
Qatar (QE Index)	10,753.28	0.42	0.56	0.24	0.24	3.07	544 QAR	1.52	19.45
Dubai (DFMGI)	2,765.71	0.51	0.79	-1.60	-1.60	10.98	303 AED	1.60	11.62
Abu Dhabi (ADI)	7,318.18	1.03	3.58	7.06	7.06	45.05	1,000 AED	1.96	11.41
Bahrain (BAX)	1,597.00	0.14	1.14	0.57	0.57	7.20	16 BHD	1.25	23.50
MUSCAT SE INDEX	4,030.40	0.31	-1.10	-0.81	-0.81	10.16	5 OMR	0.93	13.25
Developed Markets									
MSCI World Index	3,089.82	0.66	-0.09	1.73	1.73	14.11			
U.S. (S&P 500)	4,419.15	0.42	-0.25	2.40	2.40	17.16			
U.K. (FTSE 100)	7,078.42	0.88	0.73	0.59	0.59	9.57			
Japan (Topix)	1,927.43	0.41	1.21	-0.83	-0.83	6.80			
Emerging Markets									
MSCI EM Index	1,295.41	2.15	-3.29	-7.74	-7.74	-1.79			
China (SSE Composite)	3,411.72	1.49	-3.91	-5.00	-5.00	-1.77			
India (Sensex)	52,653.07	0.40	-0.55	0.38	0.38	10.33			

Oil Prices

Oil prices rose on Thursday as crude stockpiles in the United States, the world's top oil consumer, fell to their lowest since January 2020, with Brent crude oil prices pushing back past \$75 a barrel, Brent crude oil futures were up 17 cents, or 0.2 %, at \$74.91 a barrel.

Kuwait Market

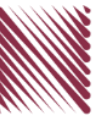
The market closed up by 0.58%, value traded 73.5 million KD, Premier market value traded reached 41.6 million KD and closed at 7,164 change by 0.76%.

Saudi Market

The Market closed up today by 0.72%, today market Performance is linked to oil prices raised to \$74.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



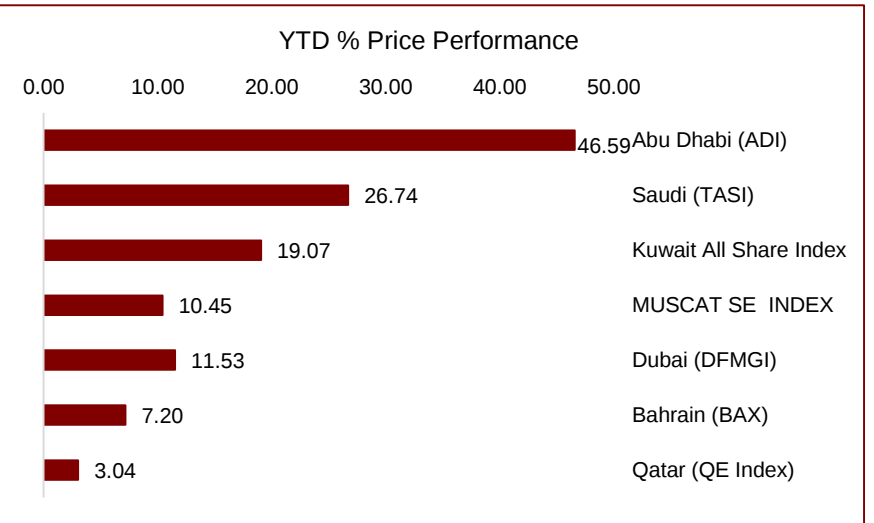
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.894	0.68	4.56	5.30	5.30	11.75	6.39 KWD	1.69	27.00
KFH	0.785	1.03	2.88	3.43	3.43	27.55	6.56 KWD	3.49	32.00
Zain	0.591	0.34	1.20	0.34	0.34	-2.48	2.55 KWD	2.20	13.61
BOUBYAN BANK	0.800	2.04	9.73	9.43	9.43	48.07	2.49 KWD	3.60	34.00
Agility	0.986	0.72	4.90	7.30	7.30	60.28	2.18 KWD	1.78	48.60
Saudi Arabia									
ARAMCO	34.85	-0.14	-0.29	-0.85	-0.85	-0.57	6,979.81 SAR	6.90	34.67
SABIC	121.00	0.50	1.18	-1.15	-1.15	18.74	361.19 SAR	2.11	35.00
STC	134.00	3.40	5.86	1.52	1.52	26.04	259.19 SAR	3.98	23.45
AL-RAJHI BANK	111.00	1.09	2.22	-0.36	-0.36	50.27	274.49 SAR	4.64	23.68
NCB	55.00	1.10	-1.44	-5.03	-5.03	26.18	243.60 SAR	1.96	14.23
United Arab Emirates									
ETISALAT.AD	22.80	0.00	2.24	3.64	3.64	34.91	198.29 AED	4.44	21.56
FAB.AD	16.58	1.97	1.72	-0.72	-0.72	28.53	177.56 AED	1.73	16.51
EMIRATES NBD	13.40	0.00	2.29	1.13	1.13	30.10	84.64 AED	1.02	12.93
DB ISLAMIC BK	4.83	1.68	1.47	0.21	0.21	4.77	34.39 AED	0.95	14.39
EMAAR PROPERT	3.98	1.79	1.02	-4.33	-4.33	12.75	27.99 AED	0.50	11.36
Qatar									
QNB	18.20	0.61	2.25	1.39	1.39	2.08	167.09 QAR	1.73	14.68
INDUSTRIES QAT	13.35	1.29	0.91	0.53	0.53	22.54	79.74 QAR	2.40	24.64
QA ISLAMIC BK	17.22	0.23	1.29	-0.29	-0.29	0.76	40.60 QAR	1.76	13.40
MASRAF AL RAYA	4.32	-1.71	-0.23	-1.55	-1.55	-3.09	32.96 QAR	2.31	14.75
MESAIEED PETRO	1.91	1.06	1.76	1.38	1.38	-6.79	23.77 QAR	1.52	27.82
OMAN									
BANK MUSCAT	0.448	-0.44	-2.18	5.66	5.66	24.44	1.61 OMR	0.80	8.33
OMANTEL	0.792	1.02	1.02	-0.50	-0.50	9.39	0.59 OMR	1.10	7.69
BANK DHOFAR	0.123	0.00	-2.38	-1.60	-1.60	26.80	0.37 QAR	0.52	14.93
NAT BANK OF OMAN	0.185	0.00	0.00	-7.50	-7.50	15.63	0.30 QAR	0.56	12.71
OMINVEST	0.314	-1.26	-0.63	0.64	0.64	-7.10	0.26 QAR	0.99	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
21-Jul-21	20.02%	12.78%	0.06%	0.41%	0.37%	4.66%	2.55%	10.55%	5.05%	4.08%
28-Jul-21	20.03%	12.92%	0.06%	0.41%	0.37%	4.66%	2.55%	10.58%	5.04%	4.09%

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 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 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

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 up today by + 0.43 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-19.81 %

KSA

Saudi Armco have negative performance today by -0.14 %, SABIC has positive performance today by 0.50 %

STC has a positive performance today by + 3.40 %, Al Rajhi Bank has a positive performance today by + 1.09 %

UAE

ETISALAT AD closed flat today , 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