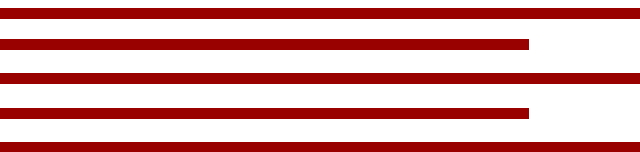
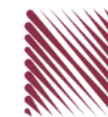


شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



## GCC DAILY MORNING BRIEF

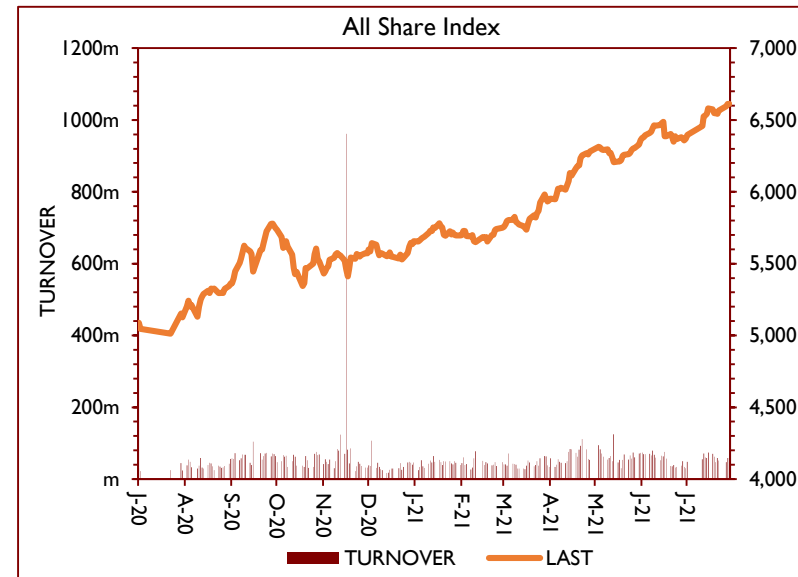
Sunday, August 29, 2021



### Market Watch

| Description            | Close    | Day Δ | WTD   | MTD   | QTD   | YTD    | M Cap (in Bn) | PBV  | PE    |
|------------------------|----------|-------|-------|-------|-------|--------|---------------|------|-------|
| <b>Kuwait</b>          |          | %     | %     | %     | %     | %      |               |      |       |
| Kuwait All Share Index | 6,797.35 | 0.09  | 1.94  | 3.29  | 6.43  | 22.71  | 40.03 KWD     | 2.62 | 27.02 |
| Kuwait Premier Index   | 7,453.24 | 0.08  | 2.22  | 4.03  | 7.46  | 23.17  | 30.24 KWD     | 2.31 | 28.50 |
| Kuwait Main Index      | 5,492.28 | 0.11  | 1.06  | 1.01  | 3.30  | 20.65  | 9.79 KWD      | 3.55 | 22.54 |
| NIC 50                 | 8,272.72 | 0.67  | 2.17  | 3.95  | 7.39  | 23.17  | 28.60 KWD     | 1.57 | 15.56 |
| <b>Kuwait Sector</b>   |          |       |       |       |       |        |               |      |       |
| Banking                | 1,566.13 | 0.04  | 0.04  | 4.37  | 8.16  | 24.05  | 23.11 KWD     | 1.30 | 29.50 |
| Telecom                | 1,108.23 | 0.32  | 0.32  | 1.68  | 2.57  | 0.54   | 3.39 KWD      | 0.71 | 13.06 |
| Industrials            | 1,167.33 | 0.08  | 0.08  | 0.66  | 3.11  | 31.00  | 4.14 KWD      | 0.83 | 10.85 |
| Financial services     | 1,263.72 | 0.26  | 0.26  | 3.85  | 9.26  | 35.93  | 3.19 KWD      | 0.79 | 10.81 |
| Real estate            | 1,234.49 | 0.01  | 0.01  | 2.09  | 4.18  | 29.59  | 2.66 KWD      | 0.67 | 29.34 |
| Basic materials        | 1,100.20 | 0.19  | 0.19  | 2.15  | 0.43  | 22.44  | 0.98 KWD      | 1.99 | 11.69 |
| Health care            | 807.12   | 0.00  | 0.00  | 0.79  | 2.15  | -2.36  | 0.40 KWD      | 4.60 | 14.27 |
| Consumer services      | 744.10   | 0.42  | 0.42  | -3.55 | -5.11 | -0.30  | 0.55 KWD      | 0.93 | 9.86  |
| Insurance              | 1,419.72 | -1.53 | -1.53 | 1.06  | 2.47  | 22.80  | 0.60 KWD      | 0.83 | 9.29  |
| Consumer Disc          | 1,063.01 | 0.33  | 0.33  | 2.67  | 9.09  | 29.86  | 0.23 KWD      | 1.32 | 9.18  |
| Energy                 | 1,381.99 | 1.62  | 1.62  | -2.41 | -3.38 | 8.19   | 0.28 KWD      | 1.01 | 14.21 |
| Technology             | 792.98   | 7.92  | 3.81  | 4.81  | -3.54 | 57.74  | 0.01 KWD      | 0.86 | 0.00  |
| Utilities              | 615.79   | 0.00  | 0.86  | 3.08  | 2.63  | -15.52 | 0.26 KWD      | 4.86 | 20.07 |

| Description              | Close     | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|--------------------------|-----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>GCC Markets</b>       |           | %     | %     | %     | %     | %     |               |      |       |
| Saudi (TASI)             | 11,180.19 | 0.46  | -0.65 | 1.05  | 1.32  | 28.66 | 9,713 SAR     | 2.70 | 20.07 |
| Qatar (QE Index)         | 11,082.74 | -0.18 | 0.45  | 3.06  | 3.28  | 6.19  | 562 QAR       | 1.53 | 16.09 |
| Dubai (DFMGI)            | 2,905.15  | 0.18  | 2.36  | 5.04  | 3.37  | 16.59 | 316 AED       | 1.62 | 20.11 |
| Abu Dhabi (ADI)          | 7,630.55  | 0.07  | 0.14  | 4.27  | 11.63 | 51.42 | 1,340 AED     | 1.75 | 24.11 |
| Bahrain (BAX)            | 1,666.54  | 0.00  | 1.74  | 4.35  | 4.95  | 11.59 | 17 BHD        | 1.16 | 10.90 |
| MUSCAT SE INDEX          | 3,972.33  | 0.25  | -0.27 | -1.44 | -2.24 | 8.49  | 5 OMR         | 0.91 | 13.25 |
| <b>Developed Markets</b> |           |       |       |       |       |       |               |      |       |
| MSCI World Index         | 3,133.67  | 0.75  | 1.74  | 2.10  | 3.86  | 16.49 |               |      |       |
| U.S. (S&P 500)           | 4,509.37  | 0.33  | 1.52  | 2.60  | 4.93  | 20.06 |               |      |       |
| U.K. (FTSE 100)          | 7,148.01  | 0.32  | 0.85  | 1.65  | 1.57  | 10.64 |               |      |       |
| Japan (Topix)            | 1,928.77  | -0.34 | 2.56  | 1.46  | -0.76 | 6.88  |               |      |       |
| <b>Emerging Markets</b>  |           |       |       |       |       |       |               |      |       |
| MSCI EM Index            | 1,272.67  | 0.52  | 4.25  | -0.40 | -7.42 | -1.44 |               |      |       |
| China (SSE Composite)    | 3,522.16  | 0.59  | 2.77  | 3.67  | -1.92 | 1.41  |               |      |       |
| India (Sensex)           | 56,124.72 | 0.31  | 1.44  | 6.73  | 6.94  | 17.54 |               |      |       |



### What Move the GCC markets ,

#### Oil Prices

Oil prices rose 2% on Friday, posting their biggest weekly gains in over a year, as energy firms began shutting U.S. production in the Gulf of Mexico ahead of a major hurricane expected to hit early next week, Brent futures rose \$1.63, or 2.3%, to settle at \$72.70 a barrel.

#### Kuwait Market

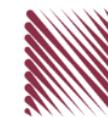
The market closed up by + 0.09%, value traded 58.3 million KD, Premier market value traded reached 38.6 million KD and closed at 7,453 change by + 0.08%.

#### Saudi Market

The Market closed up today by + 0.46%, with positive macroeconomic sentiments bounce of oil + 2.3% recouping some of the losses in the previous session when prices hit a three-week low.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



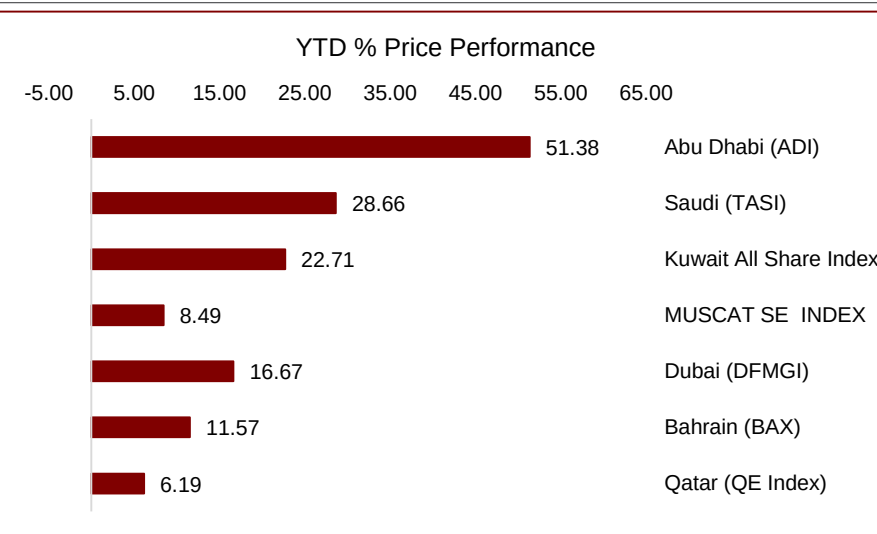
| Description                 | Close  | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|-----------------------------|--------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>Blue Chip Watch</b>      |        | %     | %     | %     | %     | %     |               |      |       |
| <b>Kuwait</b>               |        |       |       |       |       |       |               |      |       |
| NBK                         | 0.939  | 0.00  | 4.80  | 5.03  | 10.60 | 17.38 | 6.76 KWD      | 1.79 | 27.00 |
| KFH                         | 0.820  | 0.12  | 1.86  | 4.46  | 8.04  | 33.23 | 6.92 KWD      | 3.27 | 32.00 |
| Zain                        | 0.608  | 0.50  | 1.67  | 2.88  | 3.23  | 0.33  | 2.62 KWD      | 2.26 | 13.98 |
| BOUBYAN BANK                | 0.787  | -0.63 | 0.64  | -1.62 | 7.51  | 45.48 | 2.52 KWD      | 3.64 | 34.00 |
| Agility                     | 1.004  | 0.00  | 0.80  | 1.83  | 9.37  | 63.37 | 2.24 KWD      | 1.81 | 28.02 |
| <b>Saudi Arabia</b>         |        |       |       |       |       |       |               |      |       |
| ARAMCO                      | 34.90  | 0.14  | -0.29 | 0.00  | -0.71 | -0.43 | 6,970.19 SAR  | 6.77 | 26.19 |
| SABIC                       | 121.00 | 0.50  | -0.99 | -0.50 | -1.15 | 18.74 | 361.21 SAR    | 2.13 | 35.00 |
| STC                         | 128.80 | -0.92 | -0.91 | -2.99 | -1.22 | 22.64 | 260.00 SAR    | 4.06 | 23.46 |
| AL-RAJHI BANK               | 120.80 | 1.17  | -2.29 | 7.57  | 7.57  | 62.23 | 298.51 SAR    | 5.00 | 23.78 |
| NCB                         | 58.90  | 0.34  | -0.51 | 6.73  | 1.91  | 35.41 | 262.87 SAR    | 1.65 | 16.19 |
| <b>United Arab Emirates</b> |        |       |       |       |       |       |               |      |       |
| ETISALAT.AD                 | 23.64  | -0.42 | -2.23 | 3.68  | 7.45  | 39.88 | 206.46 AED    | 4.38 | 22.43 |
| FAB.AD                      | 16.98  | -0.12 | 0.95  | 2.41  | 1.68  | 31.63 | 185.64 AED    | 1.75 | 17.26 |
| EMIRATES NBD                | 13.90  | 0.00  | 2.96  | 3.73  | 4.91  | 34.95 | 87.80 AED     | 1.05 | 12.59 |
| DB ISLAMIC BK               | 5.15   | 0.19  | 1.78  | 6.63  | 6.85  | 11.71 | 37.22 AED     | 1.01 | 15.57 |
| EMAAR PROPERT               | 4.16   | 0.48  | 1.96  | 4.52  | 0.00  | 17.85 | 29.64 AED     | 0.53 | 13.65 |
| <b>Qatar</b>                |        |       |       |       |       |       |               |      |       |
| QNB                         | 19.15  | 0.10  | -0.16 | 5.22  | 6.69  | 7.40  | 176.69 QAR    | 1.83 | 15.52 |
| INDUSTRIES QAT              | 12.90  | 0.16  | -1.45 | -3.37 | -2.64 | 18.68 | 77.92 QAR     | 2.21 | 15.50 |
| QA ISLAMIC BK               | 18.24  | -1.08 | 1.16  | 5.92  | 5.49  | 6.60  | 43.57 QAR     | 1.89 | 14.39 |
| MASRAF AL RAYA              | 4.56   | -0.07 | 1.67  | 5.56  | 2.27  | 0.66  | 34.22 QAR     | 2.40 | 15.31 |
| MESAIEED PETRO              | 1.98   | -0.30 | 2.27  | 3.56  | 5.21  | -3.27 | 24.95 QAR     | 1.54 | 19.10 |
| <b>OMAN</b>                 |        |       |       |       |       |       |               |      |       |
| BANK MUSCAT                 | 0.446  | 1.36  | 1.36  | -0.45 | 5.19  | 23.89 | 1.57 OMR      | 0.77 | 8.33  |
| OMANTEL                     | 0.772  | 0.00  | -1.53 | -2.53 | -3.02 | 6.63  | 0.58 OMR      | 1.05 | 7.69  |
| BANK DHOFAR                 | 0.118  | 0.00  | 0.00  | -4.06 | -5.60 | 21.65 | 0.35 QAR      | 0.51 | 14.93 |
| NAT BANK OF OMAN            | 0.187  | 0.00  | -0.53 | 1.08  | -6.50 | 16.88 | 0.30 QAR      | 0.56 | 12.71 |
| OMINVEST                    | 0.312  | 0.00  | 0.00  | -0.64 | 0.00  | -7.69 | 0.25 QAR      | 0.93 | 6.85  |

| Foreign Holding |        |        |       |       |         |       |       |        |       |       |
|-----------------|--------|--------|-------|-------|---------|-------|-------|--------|-------|-------|
| Date            | NBK    | GBK    | CBK   | ABK   | MUTAHED | KIB   | BURG  | KFH    | BOUB  | WARBA |
| 18-Aug-21       | 20.23% | 11.54% | 0.06% | 0.38% | 0.36%   | 4.72% | 2.59% | 10.74% | 5.12% | 4.15% |
| 25-Aug-21       | 20.33% | 11.14% | 0.06% | 0.38% | 0.35%   | 4.91% | 2.67% | 10.80% | 5.14% | 4.18% |

### End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



### Leading Sector Performance

The market is up today by + 0.09 %The leading sector best performance indices today are Energy 1.62 % Consumer services 0.42 % Consumer Disc 0.33 % 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 + 0.32 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-22.02 %

### KSA

Saudi Armco has positive performance today by + 0.14 %, SABIC has positive performance today by + 0.50 %

STC has negative performance today by – 0.92 %, Al Rajhi Bank has positive performance today by + 1.17 %

### UAE

ETISALAT AD closed down today by - 0.42%, and act defensively with COVID19



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