

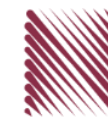


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, September 29, 2021

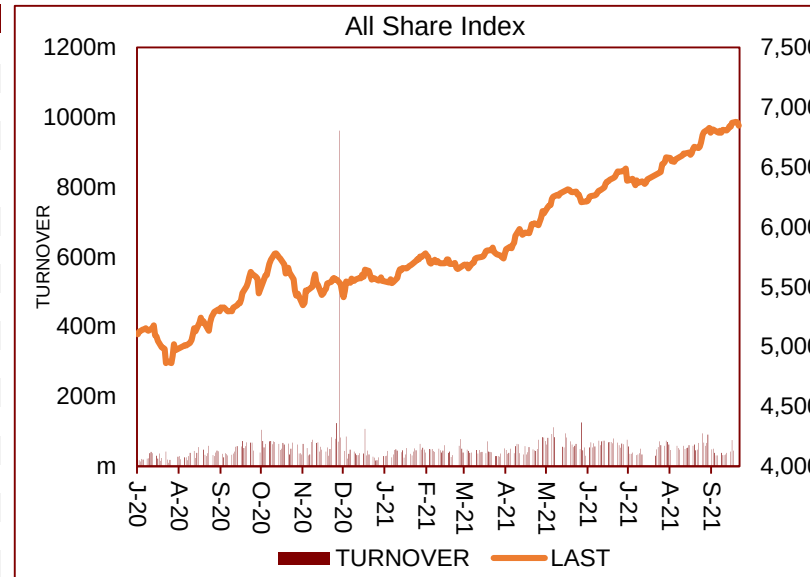




Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,872.87	-0.03	-0.05	1.27	7.61	23.92	40.49 KWD	2.65	26.97
Kuwait Premier Index	7,504.90	0.02	-0.16	0.99	8.20	24.03	30.47 KWD	2.32	28.41
Kuwait Main Index	5,626.13	-0.18	0.30	2.15	5.82	23.58	10.02 KWD	3.64	22.70
NIC 50	8,346.14	0.00	-0.21	0.91	8.13	24.03	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,579.36	0.03	-0.26	1.12	8.99	25.01	23.33 KWD	1.30	29.41
Telecom	1,097.28	0.02	-0.44	-1.59	1.42	-0.59	3.37 KWD	0.71	12.98
Industrials	1,166.10	-0.32	-0.21	-0.10	2.86	30.68	4.14 KWD	0.90	11.88
Financial services	1,320.72	-0.29	0.84	4.96	14.35	42.25	3.30 KWD	0.82	10.69
Real estate	1,277.77	0.15	-0.15	2.80	7.88	34.19	2.75 KWD	0.71	28.44
Basic materials	1,080.89	0.20	0.61	-0.19	-1.34	20.27	0.96 KWD	1.93	11.81
Health care	796.19	0.19	0.57	0.57	0.76	-3.68	0.39 KWD	4.50	13.23
Consumer services	781.41	0.44	0.93	5.59	-0.35	4.70	0.58 KWD	1.09	10.17
Insurance	1,466.80	-0.09	1.17	0.57	5.93	26.94	0.61 KWD	0.80	9.97
Consumer Disc	1,112.61	-0.06	-0.01	1.88	13.94	35.64	0.24 KWD	1.38	9.70
Energy	1,385.01	0.03	-0.11	0.78	-4.03	7.47	0.29 KWD	1.05	14.57
Technology	714.41	0.00	-1.80	-2.00	-13.10	42.11	0.01 KWD	0.84	0.00
Utilities	621.05	0.00	0.00	1.72	3.95	-14.44	0.26 KWD	4.96	20.50

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,383.65	0.01	0.90	0.47	3.53	30.87	10,084 SAR	2.71	20.93
Qatar (QE Index)	11,431.15	0.39	1.70	3.05	6.53	9.54	578 QAR	1.76	16.67
Dubai (DFMGI)	2,826.53	-0.15	-0.46	-2.63	0.57	13.43	312 AED	1.56	19.41
Abu Dhabi (ADI)	7,730.63	-0.33	-1.20	0.60	13.10	53.22	1,340 AED	1.77	24.54
Bahrain (BAX)	1,703.22	0.08	0.04	3.51	7.26	14.33	18 BHD	1.17	11.06
MUSCAT SE INDEX	3,943.39	-0.22	0.42	-0.59	-2.95	7.78	5 OMR	0.92	13.25
Developed Markets									
MSCI World Index	3,028.75	-0.13	-2.28	-3.46	0.51	12.74			
U.S. (S&P 500)	4,359.46	0.16	-2.31	-3.76	1.28	15.88			
U.K. (FTSE 100)	7,108.16	1.14	0.54	-0.42	0.74	9.74			
Japan (Topix)	2,038.29	-2.09	-2.51	3.96	4.87	12.94			
Emerging Markets									
MSCI EM Index	1,251.28	-0.76	-0.33	-3.65	-8.27	-2.35			
China (SSE Composite)	3,536.29	-1.83	-2.12	-0.22	-1.53	1.82			
India (Sensex)	59,413.27	-0.43	-1.06	3.23	13.21	24.42			



What Move the GCC markets ,

Oil Prices

Oil prices fell for the second straight day on Wednesday as doubts re-emerged over demand, with Covid-19 cases continuing to rise worldwide and gasoline shortages in some regions, Brent crude fell 43 cents, or 0.6%, to \$78.65 per barrel

Kuwait Market

The market closed down today by - 0.03%, value traded 45.8 million KD, Premier market value traded reached 17.8 million KD and closed at 7,503 up by + 0.02%.

Saudi Market

The Market closed up today by + 0.01%, with positive macroeconomic sentiments bounce of oil reaching \$78.65 or -0.6%.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



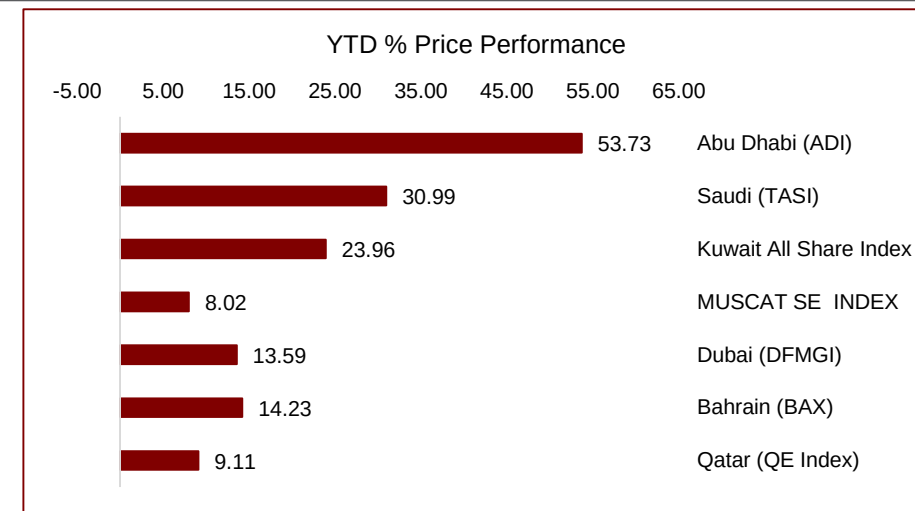
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	0.955	-0.10	-0.42	2.14	12.60	19.50	6.88 KWD	1.82	27.00
KFH	0.825	0.24	-0.24	-0.36	8.43	33.72	6.95 KWD	3.28	32.00
Zain	0.600	0.17	-0.50	-1.96	1.70	-1.16	2.59 KWD	2.24	13.84
BOUBYAN BANK	0.769	-0.26	0.26	-1.28	5.60	42.90	2.45 KWD	3.54	34.00
Agility	0.987	0.00	-0.20	-1.20	7.52	60.61	2.20 KWD	1.77	27.55
Saudi Arabia									
ARAMCO	36.00	-0.96	2.86	2.28	2.42	2.71	7,270.19 SAR	7.06	26.42
SABIC	127.00	-1.40	4.26	3.58	4.60	25.64	386.41 SAR	2.28	35.00
STC	123.80	-0.64	-5.21	-8.30	-5.93	16.79	249.21 SAR	3.89	22.74
AL-RAJHI BANK	121.00	-0.33	0.00	0.00	9.01	64.40	303.51 SAR	5.09	23.86
NCB	60.20	-0.50	0.84	-0.82	4.69	39.10	270.93 SAR	1.68	16.51
United Arab Emirates									
ETISALAT.AD	24.02	-0.58	-2.20	1.78	9.18	42.13	210.09 AED	4.46	22.82
FAB.AD	18.08	-1.09	-1.74	6.35	8.26	40.16	199.59 AED	1.89	18.56
EMIRATES NBD	14.05	0.00	0.36	1.44	6.04	36.41	88.74 AED	1.06	12.73
DB ISLAMIC BK	4.92	-0.81	0.00	-3.53	2.07	6.72	35.91 AED	0.97	15.03
EMAAR PROPERT	4.03	0.25	-0.98	-4.05	-3.12	14.16	28.78 AED	0.51	13.26
Qatar									
QNB	19.01	0.05	-0.47	-0.83	5.91	6.62	175.49 QAR	1.82	15.42
INDUSTRIES QAT	15.24	1.46	7.48	18.60	15.02	40.20	90.87 QAR	2.57	18.07
QA ISLAMIC BK	18.18	0.17	1.06	-0.71	5.09	6.20	42.89 QAR	1.86	14.16
MASRAF AL RAYA	4.46	0.34	0.09	-2.20	-0.20	-1.77	33.34 QAR	2.34	14.92
MESAIEED PETRO	2.27	0.53	2.43	13.70	20.83	11.09	28.41 QAR	1.76	21.74
OMAN									
BANK MUSCAT	0.444	-0.45	0.45	0.91	4.72	23.33	1.59 OMR	0.78	8.33
OMANTEL	0.740	-1.60	-1.07	-2.12	-7.04	2.21	0.56 OMR	1.02	7.69
BANK DHOFAR	0.118	0.00	0.00	0.00	-5.60	21.65	0.35 QAR	0.51	14.93
NAT BANK OF OMAN	0.184	-1.08	-0.54	-2.13	-8.00	15.00	0.30 QAR	0.55	12.71
OMINVEST	0.310	0.00	0.00	-2.52	-0.64	-8.28	0.25 QAR	0.92	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
15-Sep-21	20.77%	10.56%	0.06%	0.35%	0.36%	4.68%	2.72%	10.92%	5.22%	4.19%
22-Sep-21	20.89%	9.91%	0.06%	0.37%	0.38%	4.58%	2.61%	11.00%	5.25%	4.11%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is down today by -0.03 %The leading sector bottom performance indices today are Industrials -0.32 % Financial services -0.29 % Insurance -0.09 % 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 + 0.02 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-24.51 %

KSA

Saudi Armco have negative performance today by -0.96 %, SABIC have negative performance today by -1.4 %

STC have negative performance today by -0.64 %, Al Rajhi Bank have negative performance today by -0.33 %

UAE

ETISALAT AD closed down today by - 0.58%, and act defensively with COVID19



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