



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MORNING BRIEF

Wednesday, June 30, 2021

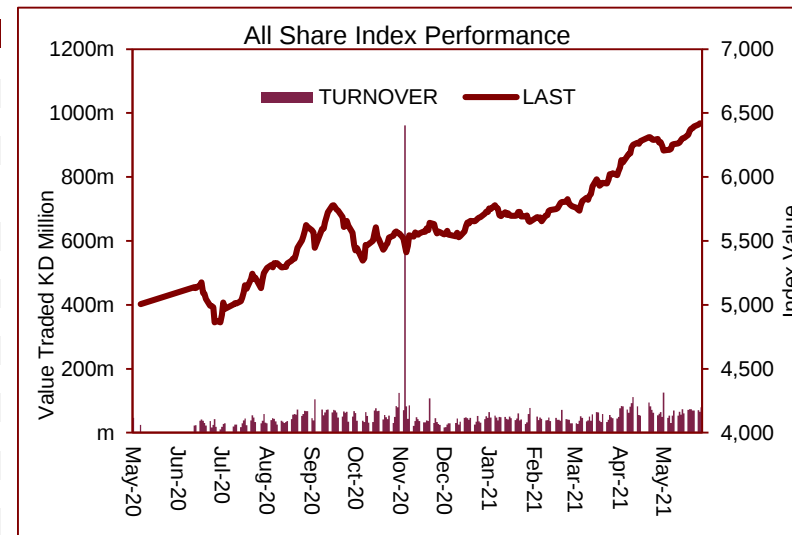
DAILY MARKETS WRAP,

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	6,386.79	-1.55	-1.13	2.83	10.58	15.16	38.06 KWD	2.14	34.63
Kuwait Premier Index	6,936.12	-1.71	-1.14	2.91	9.67	14.63	28.59 KWD	2.31	36.60
Kuwait Main Index	5,316.87	-1.05	-1.08	2.60	13.43	16.79	9.47 KWD	1.63	28.86
NIC 50	7,728.62	-1.60	-1.19	2.83	9.60	14.63	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,447.99	-1.83	-0.90	4.25	10.18	14.70	21.73 KWD	1.38	37.60
Telecom	1,080.45	-0.88	0.40	-0.85	-3.07	-1.98	3.34 KWD	0.63	14.12
Industrials	1,132.08	-1.19	-2.10	0.54	22.94	27.04	4.05 KWD	0.83	14.36
Financial services	1,156.58	-2.13	-1.60	2.03	17.43	24.40	3.03 KWD	0.82	10.85
Real estate	1,184.91	-1.93	-2.59	2.19	16.54	24.38	2.59 KWD	0.72	43.54
Basic materials	1,095.47	0.06	-3.04	-0.87	0.59	21.91	0.98 KWD	1.93	11.77
Health care	790.17	0.47	0.46	-0.04	-2.48	-4.41	0.39 KWD	4.12	38.42
Consumer services	784.19	0.79	-1.04	-0.08	10.80	5.07	0.51 KWD	0.93	9.68
Insurance	1,385.54	2.04	2.66	11.04	15.36	19.84	0.52 KWD	0.80	9.46
Consumer Disc	974.46	-0.42	-2.00	2.74	15.24	19.04	0.24 KWD	1.34	8.69
Energy	1,430.36	-1.35	-3.49	2.15	16.74	11.98	0.30 KWD	1.08	14.43
Technology	822.08	-4.24	-3.42	31.70	37.81	63.53	0.01 KWD	0.99	0.00
Utilities	600.00	0.00	-2.15	-5.00	-14.92	-17.69	0.25 KWD	3.61	20.55



What Move the GCC markets ,

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,984.15	-0.11	0.28	3.78	10.52	26.01	9,766 SAR	2.84	22.55
Qatar (QE Index)	10,730.68	-0.17	0.03	0.15	3.49	3.15	548 QAR	1.54	20.25
Dubai (DFMGI)	2,810.56	-0.61	-1.63	0.47	10.21	12.78	311 AED	1.40	11.74
Abu Dhabi (ADI)	6,835.43	1.07	3.94	4.22	15.61	35.48	969 AED	1.84	12.54
Bahrain (BAX)	1,587.97	-0.51	0.56	3.95	8.91	6.59	17 BHD	1.25	23.13
MUSCAT SE INDEX	4,063.40	0.13	0.41	5.47	9.56	11.06	5 OMR	0.90	13.25
Developed Markets									
MSCI World Index	3,024.44	-0.03	-0.02	1.64	7.57	12.43			
U.S. (S&P 500)	4,291.80	0.33	0.26	2.09	8.03	14.26			
U.K. (FTSE 100)	7,056.15	-0.44	-1.12	0.48	5.10	9.22			
Japan (Topix)	1,943.57	-0.30	-0.97	1.07	-0.53	7.70			
Emerging Markets									
MSCI EM Index	1,377.15	-0.27	-0.18	0.07	4.61	6.65			
China (SSE Composite)	3,591.20	0.50	-0.45	-0.67	4.34	3.40			
India (Sensex)	52,482.71	-0.13	-0.84	1.05	6.01	9.91			

Oil Prices

Oil prices were broadly steady on Wednesday, heading for monthly and quarterly gains, after some data suggested U.S. crude stockpiles were shrinking while an OPEC report warned of a possibly significant glut building by the end of next year, Brent crude was up 6 cents, or 0.08% at \$74.82 a barrel.

Kuwait Market

The market closed today down by 1.55%, value traded 31.2 million KD, Premier market value traded reached 44.5 million KD and closed at 6,936 change by 1.71%.

Saudi Market

The Market closed down today by 0.11%, today market Performance is linked to oil prices raised to \$74.

DAILY MARKETS WRAP,

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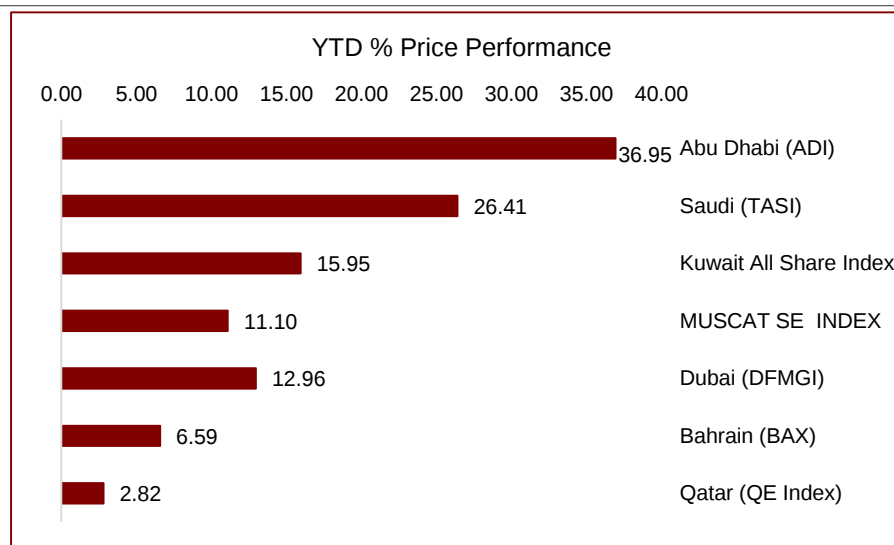
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.849	-2.19	-0.93	2.53	5.45	6.38	6.23 KWD	1.61	27.00
KFH	0.759	-1.68	-1.42	2.55	9.43	24.14	6.50 KWD	3.46	32.00
Zain	0.589	-0.84	0.51	-1.01	-2.64	-2.81	2.57 KWD	2.29	14.12
BOUBYAN BANK	0.732	-3.17	0.68	9.54	27.56	35.87	2.40 KWD	3.95	34.00
Agility	0.918	-2.03	-3.15	0.22	39.55	49.87	2.09 KWD	1.71	46.51
Saudi Arabia									
ARAMCO	35.10	-0.57	-0.28	-0.71	-2.64	0.14	7,060.19 SAR	6.98	35.07
SABIC	121.80	0.00	0.00	-2.74	2.90	19.13	365.41 SAR	2.13	35.00
STC	131.60	-0.15	0.00	5.14	3.31	23.58	263.61 SAR	4.05	23.56
AL-RAJHI BANK	111.00	0.54	0.00	7.17	11.94	50.27	276.01 SAR	4.66	24.07
NCB	57.60	-0.69	1.05	8.85	8.85	33.33	259.73 SAR	2.08	14.88
United Arab Emirates									
ETISALAT.AD	22.00	-0.63	-0.90	1.57	1.66	30.18	192.55 AED	4.31	20.93
FAB.AD	16.70	1.95	2.71	-0.95	14.38	29.46	178.87 AED	1.74	17.40
EMIRATES NBD	13.25	-1.12	-3.99	-3.99	15.22	28.64	84.64 AED	1.02	12.93
DB ISLAMIC BK	4.82	-0.82	-1.03	1.05	5.93	4.56	35.19 AED	0.97	14.21
EMAAR PROPERT	4.16	-0.48	-1.65	5.32	17.51	17.85	29.93 AED	0.54	12.14
Qatar									
QNB	17.95	-0.72	-0.50	1.64	0.00	0.90	167.03 QAR	1.81	15.54
INDUSTRIES QAT	13.25	0.00	0.30	2.63	10.88	21.90	80.18 QAR	2.41	24.78
QA ISLAMIC BK	17.29	0.00	0.93	-0.06	5.04	1.05	40.86 QAR	1.85	13.98
MASRAF AL RAYA	4.46	0.11	0.20	0.20	3.94	-1.57	33.41 QAR	2.44	15.16
MESAIEED PETRO	1.88	-0.95	-1.05	-0.11	1.18	-8.06	23.87 QAR	1.53	27.94
OMAN									
BANK MUSCAT	0.424	0.95	-0.47	7.69	9.38	16.67	1.50 OMR	0.75	8.33
OMANTEL	0.796	1.53	1.02	0.51	0.51	9.39	0.59 OMR	1.10	7.69
BANK DHOFAR	0.125	-1.58	0.00	9.65	17.92	28.87	0.38 QAR	0.54	14.93
NAT BANK OF OMAN	0.200	0.00	1.01	19.76	33.33	25.00	0.33 QAR	0.61	12.71
OMINVEST	0.312	-1.27	-1.89	-2.50	-2.50	-7.69	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 down today by -1.55 % The leading sector bottom performance indices today are Technology -4.24 % Financial services -2.13 % Real estate -1.93 % respectively

from YTD performance perspective the best sector performance is Industrials by 27.04 % while the bottom sector performance is Utilities by -17.69 %

Telecommunication sector are down today by -0.88 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -17.14 %

KSA

Saudi Armco has negative performance today by -0.57 %, SABIC has flat performance today

STC has negative performance today by -0.15 %, Al Rajhi Bank has a positive performance today by + 0.54 %

UAE

ETISALAT AD closed down today by -0.63% , and act defensively with COVID19



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