

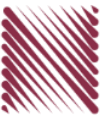


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

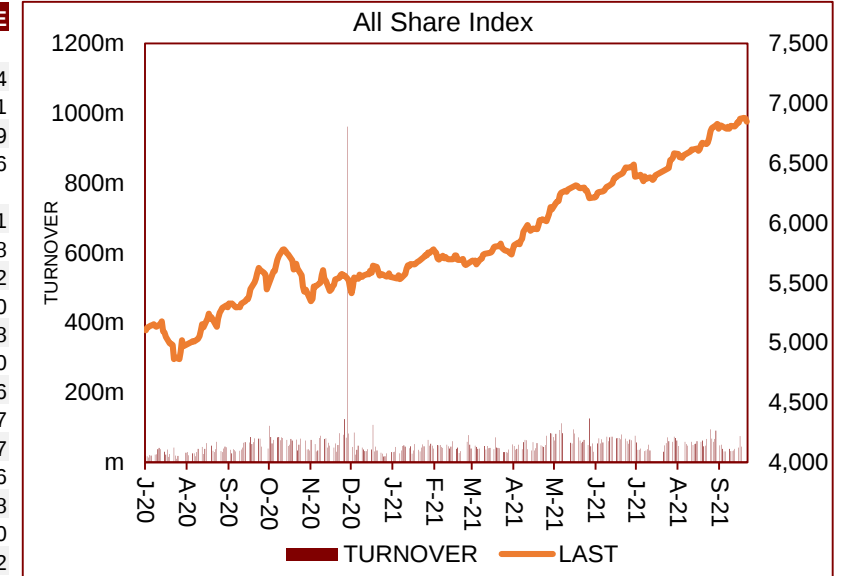
Thursday, September 30, 2021





Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,864.83	-0.12	-0.16	1.15	7.48	23.78	40.49 KWD	2.65	26.94
Kuwait Premier Index	7,496.50	-0.11	-0.27	0.87	8.08	23.89	30.48 KWD	2.32	28.41
Kuwait Main Index	5,618.67	-0.13	0.26	2.11	5.77	23.54	10.01 KWD	3.64	22.59
NIC 50	8,337.61	-0.10	-0.32	0.80	8.01	23.89	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,576.23	-0.20	-0.39	1.00	8.86	24.85	23.33 KWD	1.30	29.41
Telecom	1,095.62	-0.15	-0.45	-1.60	1.40	-0.61	3.37 KWD	0.70	12.98
Industrials	1,167.09	0.08	0.01	0.13	3.09	30.97	4.13 KWD	0.89	11.72
Financial services	1,318.92	-0.14	0.56	4.67	14.04	41.86	3.29 KWD	0.82	10.60
Real estate	1,279.43	0.13	-0.07	2.89	7.98	34.31	2.76 KWD	0.71	28.48
Basic materials	1,088.67	0.72	1.35	0.54	-0.62	21.15	0.97 KWD	1.94	11.90
Health care	795.89	-0.04	0.54	0.53	0.72	-3.72	0.40 KWD	4.50	13.36
Consumer services	783.50	0.27	1.20	5.87	-0.09	4.98	0.58 KWD	1.08	10.27
Insurance	1,450.07	-1.14	-0.04	-0.64	4.66	25.42	0.61 KWD	0.80	9.97
Consumer Disc	1,117.19	0.41	0.61	2.51	14.65	36.48	0.24 KWD	1.38	9.76
Energy	1,376.83	-0.59	0.19	1.09	-3.74	7.79	0.29 KWD	1.05	14.58
Technology	714.41	0.00	-1.80	-2.00	-13.10	42.11	0.01 KWD	0.84	0.00
Utilities	623.68	0.00	0.00	1.72	3.95	-14.44	0.26 KWD	4.94	20.42



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,495.76	0.98	1.63	1.19	4.28	31.81	10,013 SAR	2.74	20.67
Qatar (QE Index)	11,485.23	0.47	2.03	3.39	6.88	9.90	584 QAR	1.76	16.66
Dubai (DFMGI)	2,845.49	0.67	0.21	-1.98	1.24	14.19	312 AED	1.56	19.33
Abu Dhabi (ADI)	7,698.82	-0.41	-1.61	0.18	12.63	52.59	1,342 AED	1.77	24.59
Bahrain (BAX)	1,705.56	0.14	0.18	3.66	7.40	14.48	18 BHD	1.17	11.07
MUSCAT SE INDEX	3,942.50	-0.02	0.39	-0.61	-2.98	7.75	5 OMR	0.92	13.25
Developed Markets									
MSCI World Index	3,006.60	-0.73	-2.41	-3.58	0.38	12.59			
U.S. (S&P 500)	4,307.54	-1.19	-2.16	-3.61	1.44	16.06			
U.K. (FTSE 100)	7,086.42	-0.31	1.08	0.11	1.28	10.33			
Japan (Topix)	2,030.16	-0.40	-2.90	3.54	4.46	12.49			
Emerging Markets									
MSCI EM Index	1,253.10	0.15	-1.09	-4.39	-8.97	-3.10			
China (SSE Composite)	3,568.17	0.90	-1.24	0.68	-0.64	2.74			
India (Sensex)	59,126.36	-0.48	-1.54	2.73	12.66	23.82			

What Move the GCC markets ,

Oil Prices

Oil prices held steady on Thursday after rising above \$80 a barrel this week, shrugging off bearish factors such as rising U.S. crude oil inventories and a strong dollar amid consensus that a supply deficit will stay for coming months, Brent crude for November delivery was up 21 cents at \$78.85 a barrel.

Kuwait Market

The market closed down today by - 0.12%, value traded 61.4 million KD, Premier market value traded reached 29.5 million KD and closed at 7,496 down by - 0.11%.

Saudi Market

The Market closed up today by + 0.98%, with positive macroeconomic sentiments bounce of oil reaching \$78.85.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

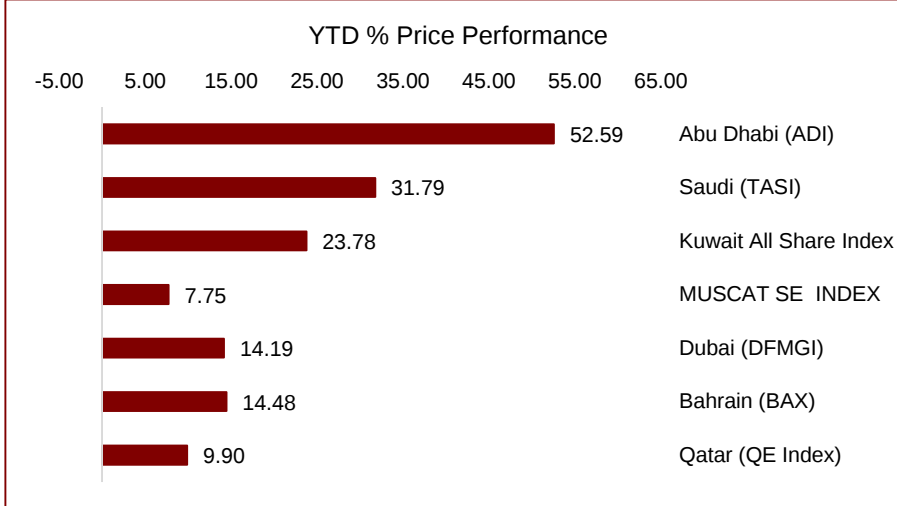


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE	
Blue Chip Watch		%	%	%	%	%				
Kuwait										
NBK	0.953	-0.21	-0.73	1.82	12.25	19.13	6.87 KWD	1.82	27.00	
KFH	0.822	-0.36	0.00	-0.12	8.70	34.05	6.97 KWD	3.29	32.00	
Zain	0.599	-0.17	-0.33	-1.80	1.87	-0.99	2.60 KWD	2.24	13.86	
BOUBYAN BANK	0.768	-0.13	-0.39	-1.92	4.92	41.97	2.45 KWD	3.53	34.00	
Agility	0.985	-0.20	-0.40	-1.40	7.30	60.28	2.20 KWD	1.77	27.55	
Saudi Arabia										
ARAMCO	36.00	0.00	3.00	2.42	2.56	2.86	7,199.62 SAR	6.99	27.36	
SABIC	127.40	0.31	3.93	3.25	4.27	25.25	380.98 SAR	2.25	35.00	
STC	127.00	2.58	-3.98	-7.11	-4.71	18.30	247.59 SAR	3.87	22.38	
AL-RAJHI BANK	122.60	1.32	1.16	1.16	10.27	66.30	302.48 SAR	5.07	23.86	
NCB	61.40	1.99	1.84	0.16	5.73	40.48	269.56 SAR	1.67	16.60	
United Arab Emirates										
ETISALAT.AD	24.02	0.00	-2.20	1.78	9.18	42.13	208.92 AED	4.43	22.69	
FAB.AD	17.78	-1.66	-3.37	4.59	6.47	37.83	197.46 AED	1.87	18.36	
EMIRATES NBD	14.20	1.07	1.43	2.53	7.17	37.86	88.76 AED	1.06	12.73	
DB ISLAMIC BK	4.95	0.61	0.61	-2.94	2.70	7.38	35.63 AED	0.96	14.90	
EMAAR PROPERT	4.08	1.24	0.25	-2.86	-1.92	15.58	28.86 AED	0.51	13.29	
Qatar										
QNB	19.15	0.74	-0.42	-0.78	5.96	6.67	176.68 QAR	1.82	15.42	
INDUSTRIES QAT	15.45	1.38	8.67	19.92	16.30	41.77	92.78 QAR	2.61	18.34	
QA ISLAMIC BK	18.25	0.39	1.39	-0.38	5.44	6.55	43.23 QAR	1.87	14.18	
MASRAF AL RAYA	4.48	0.43	0.34	-1.96	0.04	-1.52	33.66 QAR	2.35	14.97	
MESAIEED PETRO	2.26	-0.70	1.98	13.20	20.30	10.60	28.73 QAR	1.77	21.86	
OMAN										
BANK MUSCAT	0.450	1.35	0.45	0.91	4.72	23.33	1.59 OMR	0.77	8.33	
OMANTEL	0.740	0.00	-1.07	-2.12	-7.04	2.21	0.56 OMR	1.01	7.69	
BANK DHOFAR	0.117	-0.85	-0.85	-0.85	-6.40	20.62	0.35 QAR	0.51	14.93	
NAT BANK OF OMAN	0.185	0.00	0.00	-1.60	-7.50	15.63	0.30 QAR	0.55	12.71	
OMINVEST	0.314	1.29	1.29	-1.26	0.64	-7.10	0.25 QAR	0.92	6.85	
Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
22-Sep-21	20.89%	9.91%	0.06%	0.37%	0.38%	4.58%	2.61%	11.00%	5.25%	4.11%
29-Sep-21	20.91%	9.81%	0.06%	0.37%	0.41%	4.64%	2.59%	11.00%	5.24%	4.16%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is down today by -0.12 %The leading sector bottom performance indices today are Insurance -1.14 % Energy -0.59 % Banking -0.2 % 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 down today by -0.15 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-24.39 %

KSA

Saudi Armco has a flat performance today, SABIC have positive performance today by + 0.31 %

STC has a positive performance today by + 2.58 %, Al Rajhi Bank has a positive performance today by + 1.32 %

UAE

ETISALAT AD closed flat today, and act defensively with COVID19



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