



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY



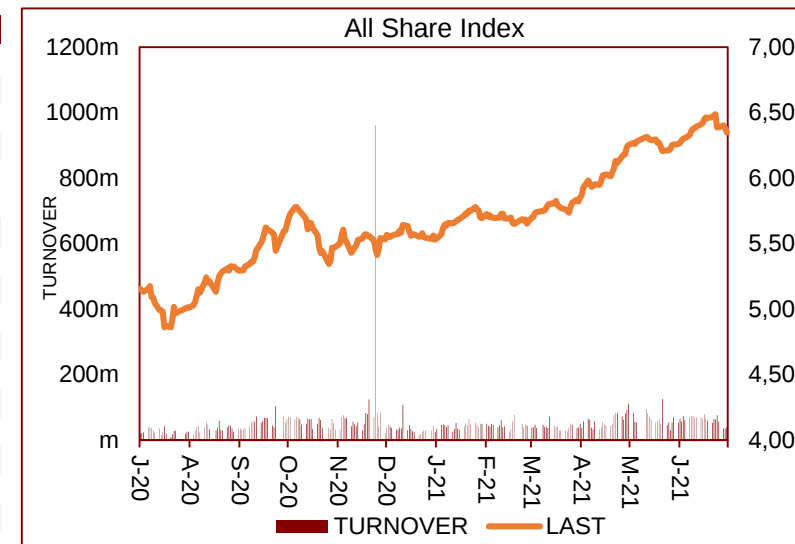
## GCC DAILY MORNING BRIEF

Wednesday, August 4, 2021



### Market Watch

| Description            | Close    | Day Δ | WTD   | MTD   | QTD   | YTD    | M Cap (in Bn) | PBV  | PE    |
|------------------------|----------|-------|-------|-------|-------|--------|---------------|------|-------|
| <b>Kuwait</b>          |          | %     | %     | %     | %     | %      |               |      |       |
| Kuwait All Share Index | 6,542.51 | -0.08 | -0.58 | -0.58 | 2.44  | 17.97  | 38.53 KWD     | 2.17 | 32.78 |
| Kuwait Premier Index   | 7,120.86 | -0.09 | -0.66 | -0.66 | 2.61  | 17.62  | 28.96 KWD     | 2.33 | 34.83 |
| Kuwait Main Index      | 5,409.88 | -0.07 | -0.68 | -0.68 | 1.57  | 18.63  | 9.57 KWD      | 1.69 | 26.77 |
| NIC 50                 | 7,933.99 | -0.07 | -0.71 | -0.74 | 2.54  | 17.62  | 28.60 KWD     | 1.57 | 15.56 |
| <b>Kuwait Sector</b>   |          |       |       |       |       |        |               |      |       |
| Banking                | 1,487.78 | -0.10 | -0.85 | -0.85 | 2.75  | 17.85  | 22.01 KWD     | 1.38 | 35.83 |
| Telecom                | 1,079.93 | -0.05 | -0.92 | -0.92 | -0.05 | -2.03  | 3.31 KWD      | 0.70 | 13.56 |
| Industrials            | 1,146.09 | -0.90 | -1.17 | -1.17 | 1.24  | 28.62  | 4.10 KWD      | 0.85 | 14.39 |
| Financial services     | 1,236.54 | 0.91  | 1.62  | 1.62  | 6.91  | 33.00  | 3.08 KWD      | 0.78 | 11.48 |
| Real estate            | 1,210.53 | -0.03 | 0.11  | 0.11  | 2.16  | 27.07  | 2.61 KWD      | 0.70 | 37.91 |
| Basic materials        | 1,073.04 | 0.23  | -0.37 | -0.37 | -2.05 | 19.41  | 0.95 KWD      | 1.90 | 11.24 |
| Health care            | 800.47   | 0.00  | -0.04 | -0.04 | 1.30  | -3.17  | 0.40 KWD      | 3.72 | 39.71 |
| Consumer services      | 763.93   | 0.27  | -0.98 | -0.98 | -2.58 | 2.35   | 0.53 KWD      | 0.94 | 10.04 |
| Insurance              | 1,393.00 | -0.92 | -0.84 | -0.84 | 0.54  | 20.48  | 0.54 KWD      | 0.92 | 9.56  |
| Consumer Disc          | 1,024.44 | -0.17 | -1.05 | -1.05 | 5.13  | 25.15  | 0.23 KWD      | 1.31 | 8.53  |
| Energy                 | 1,420.85 | 0.25  | 0.33  | 0.33  | -0.66 | 11.24  | 0.30 KWD      | 1.04 | 14.25 |
| Technology             | 749.33   | 0.00  | -0.96 | -0.96 | -8.85 | 49.06  | 0.01 KWD      | 0.87 | 0.00  |
| Utilities              | 592.11   | 0.00  | -0.88 | -0.88 | -1.31 | -18.77 | 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    |
|--------------------------|-----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>GCC Markets</b>       |           | %     | %     | %     | %     | %     |               |      |       |
| Saudi (TASI)             | 11,162.38 | -0.41 | 1.36  | 1.36  | 1.62  | 28.45 | 9,786 SAR     | 2.78 | 22.43 |
| Qatar (QE Index)         | 10,858.42 | 0.14  | 0.98  | 0.98  | 1.19  | 4.05  | 542 QAR       | 1.60 | 17.95 |
| Dubai (DFMGI)            | 2,813.20  | 0.63  | 1.72  | 1.72  | 0.09  | 12.89 | 307 AED       | 1.55 | 12.23 |
| Abu Dhabi (ADI)          | 7,405.09  | -0.38 | 1.19  | 1.19  | 8.33  | 46.77 | 1,020 AED     | 1.96 | 11.48 |
| Bahrain (BAX)            | 1,610.22  | -0.08 | 0.83  | 0.83  | 1.40  | 8.08  | 16 BHD        | 1.23 | 23.25 |
| MUSCAT SE INDEX          | 3,993.76  | -0.14 | -0.91 | -0.91 | -1.71 | 9.16  | 5 OMR         | 0.92 | 13.25 |
| <b>Developed Markets</b> |           |       |       |       |       |       |               |      |       |
| MSCI World Index         | 3,085.83  | -0.22 | 0.76  | 0.76  | 2.50  | 14.96 |               |      |       |
| U.S. (S&P 500)           | 4,402.66  | -0.46 | 0.63  | 0.63  | 2.92  | 17.76 |               |      |       |
| U.K. (FTSE 100)          | 7,123.86  | 0.26  | 1.43  | 1.43  | 1.36  | 10.41 |               |      |       |
| Japan (Topix)            | 1,921.43  | -0.50 | 1.07  | 1.07  | -1.14 | 6.47  |               |      |       |
| <b>Emerging Markets</b>  |           |       |       |       |       |       |               |      |       |
| MSCI EM Index            | 1,303.99  | 0.76  | 1.28  | 1.28  | -5.85 | 0.23  |               |      |       |
| China (SSE Composite)    | 3,477.22  | 0.85  | 2.35  | 2.35  | -3.17 | 0.12  |               |      |       |
| India (Sensex)           | 54,369.77 | 1.02  | 3.39  | 3.39  | 3.60  | 13.86 |               |      |       |

### Oil Prices

Oil prices fell for a third day on Wednesday on mounting concerns that the increasing spread of the delta variant of the coronavirus in top consuming countries will cut fuel demand, Brent crude oil futures slid 22 cents, or 0.3%, to \$72.19 a barrel.

### Kuwait Market

The market closed down by 0.08%, value traded 58.9 million KD, Premier market value traded reached 32.9 million KD and closed at 7,120 change by 0.09%.

### Saudi Market

The Market closed down today by 0.41%, today market Performance is linked to oil prices raised to \$72.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



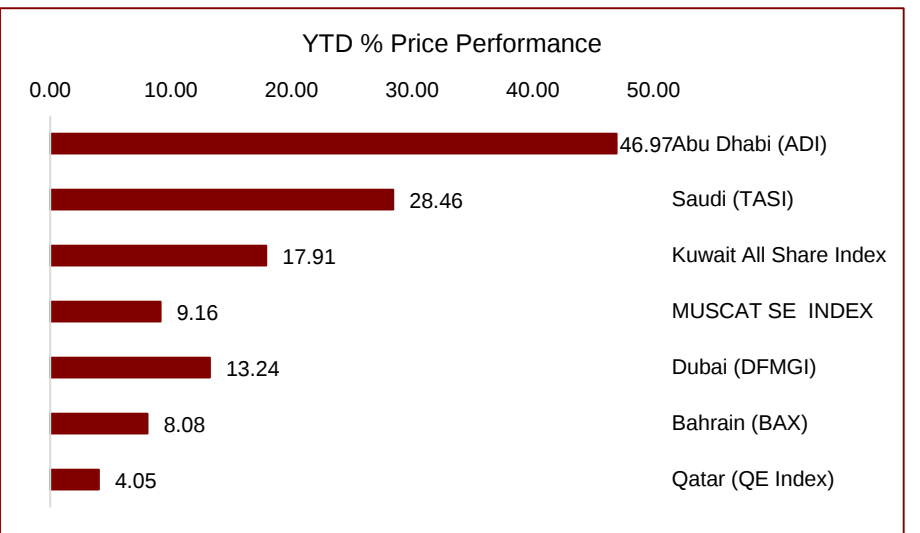
| Description                 | Close  | Day Δ | WTD   | MTD   | QTD    | YTD   | M Cap (in Bn) | PBV  | PE    |
|-----------------------------|--------|-------|-------|-------|--------|-------|---------------|------|-------|
| <b>Blue Chip Watch</b>      |        | %     | %     | %     | %      | %     |               |      |       |
| <b>Kuwait</b>               |        |       |       |       |        |       |               |      |       |
| NBK                         | 0.888  | 0.11  | -0.78 | -0.78 | 4.48   | 10.88 | 6.38 KWD      | 1.69 | 27.00 |
| KFH                         | 0.781  | -0.64 | -0.51 | -0.51 | 2.90   | 26.90 | 6.63 KWD      | 3.53 | 32.00 |
| Zain                        | 0.588  | 0.17  | -0.51 | -0.51 | -0.17  | -2.97 | 2.54 KWD      | 2.20 | 13.56 |
| BOUBAYAN BANK               | 0.756  | -0.53 | -5.25 | -5.25 | 3.55   | 40.12 | 2.42 KWD      | 3.49 | 34.00 |
| Agility                     | 0.968  | -1.73 | -1.72 | -1.72 | 5.56   | 57.68 | 2.20 KWD      | 1.80 | 48.89 |
| <b>Saudi Arabia</b>         |        |       |       |       |        |       |               |      |       |
| ARAMCO                      | 34.95  | -0.43 | 0.14  | 0.14  | -0.57  | -0.29 | 7,019.06 SAR  | 6.94 | 34.92 |
| SABIC                       | 124.20 | 0.81  | 2.64  | 2.64  | 1.97   | 22.49 | 369.55 SAR    | 2.16 | 35.00 |
| STC                         | 136.60 | 0.15  | 1.19  | 1.19  | 3.04   | 27.92 | 272.76 SAR    | 4.19 | 24.54 |
| AL-RAJHI BANK               | 117.80 | -0.51 | 5.95  | 5.95  | 5.95   | 59.78 | 295.96 SAR    | 5.00 | 22.96 |
| NCB                         | 57.20  | 0.35  | 4.00  | 4.00  | -0.69  | 31.95 | 255.21 SAR    | 2.05 | 14.46 |
| <b>United Arab Emirates</b> |        |       |       |       |        |       |               |      |       |
| ETISALAT.AD                 | 24.14  | 0.17  | 5.88  | 5.88  | 9.73   | 42.84 | 209.58 AED    | 4.45 | 22.77 |
| FAB.AD                      | 16.70  | -1.18 | 0.72  | 0.72  | 0.00   | 29.46 | 184.54 AED    | 1.74 | 17.16 |
| EMIRATES NBD                | 13.25  | -1.12 | -1.12 | -1.12 | 0.00   | 28.64 | 84.64 AED     | 1.01 | 12.14 |
| DB ISLAMIC BK               | 5.08   | 2.83  | 5.18  | 5.18  | 5.39   | 10.20 | 35.77 AED     | 0.97 | 14.97 |
| EMAAR PROPERT               | 4.05   | 1.00  | 1.76  | 1.76  | -2.64  | 14.73 | 28.71 AED     | 0.51 | 11.65 |
| <b>Qatar</b>                |        |       |       |       |        |       |               |      |       |
| QNB                         | 18.21  | 0.61  | 0.05  | 0.05  | 1.45   | 2.13  | 164.69 QAR    | 1.73 | 14.69 |
| INDUSTRIES QAT              | 13.33  | 0.00  | -0.15 | -0.15 | 0.60   | 22.63 | 79.45 QAR     | 2.43 | 24.93 |
| QA ISLAMIC BK               | 17.20  | -0.58 | -0.52 | -0.52 | -0.93  | 0.12  | 40.27 QAR     | 1.78 | 13.50 |
| MASRAF AL RAYA              | 4.43   | -0.45 | 2.55  | 2.55  | -0.65  | -2.21 | 32.88 QAR     | 2.34 | 14.93 |
| MESAIEED PETRO              | 1.98   | 1.22  | 3.61  | 3.61  | 5.26   | -3.22 | 24.26 QAR     | 1.58 | 28.82 |
| <b>OMAN</b>                 |        |       |       |       |        |       |               |      |       |
| BANK MUSCAT                 | 0.444  | 0.00  | -0.45 | -0.45 | 5.19   | 23.89 | 1.59 OMR      | 0.77 | 8.33  |
| OMANTEL                     | 0.780  | -1.02 | -1.52 | -1.52 | -2.01  | 7.73  | 0.59 OMR      | 1.11 | 7.69  |
| BANK DHOFAR                 | 0.119  | 0.00  | -3.25 | -3.25 | -4.80  | 22.68 | 0.36 QAR      | 0.51 | 14.93 |
| NAT BANK OF OMAN            | 0.177  | -1.67 | -3.78 | -3.78 | -11.00 | 11.25 | 0.29 QAR      | 0.54 | 12.71 |
| OMINVEST                    | 0.320  | 0.63  | 1.27  | 1.27  | 1.92   | -5.92 | 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

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### Leading Sector Performance

The market is down today by -0.08 %The leading sector bottom performance indices today are Insurance -0.92 % Industrials -0.9 % Consumer Disc -0.17 % 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 -0.05 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-20 %

### KSA

Saudi Armco has a negative performance today by - 0.43 %, SABIC have positive performance today by + 0.81 %

STC have positive performance today by + 0.15 %, Al Rajhi Bank has a negative performance today by + 0.51 %

### UAE

ETISALAT AD closed up today by 0.17 %, and act defensively with COVID19



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