



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

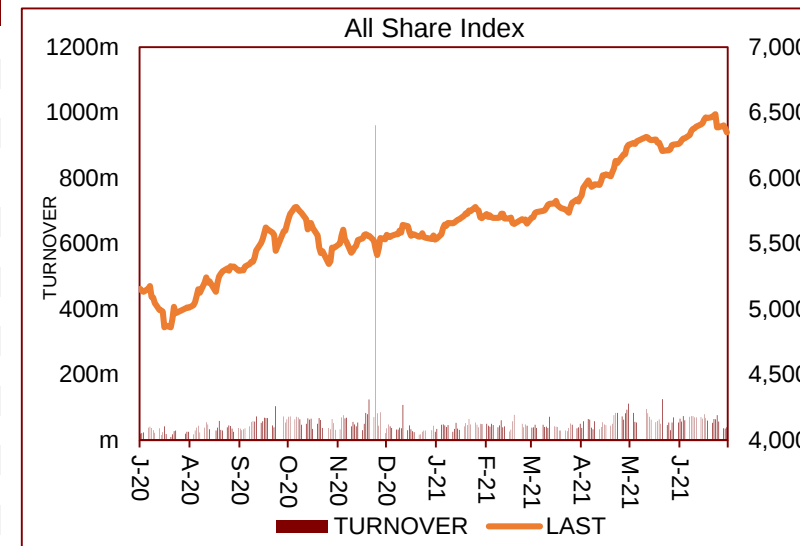


GCC DAILY MORNING BRIEF

Thursday, August 5, 2021



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,565.84	0.36	-0.23	-0.23	2.80	18.39	38.60 KWD	2.09	31.20
Kuwait Premier Index	7,153.37	0.46	-0.34	-0.34	2.94	18.00	29.03 KWD	2.22	32.71
Kuwait Main Index	5,412.50	0.05	-0.26	-0.26	2.00	19.12	9.57 KWD	1.69	26.80
NIC 50	7,969.15	0.44	-0.39	-0.42	2.87	18.00	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,494.15	0.43	-0.43	-0.43	3.19	18.35	22.04 KWD	1.37	33.71
Telecom	1,080.86	0.09	-0.83	-0.83	0.04	-1.95	3.31 KWD	0.72	13.58
Industrials	1,150.56	0.39	-1.08	-1.08	1.33	28.73	4.09 KWD	0.83	14.30
Financial services	1,242.84	0.51	2.14	2.14	7.46	33.68	3.10 KWD	0.80	11.76
Real estate	1,212.27	0.14	0.25	0.25	2.31	27.26	2.61 KWD	0.69	37.95
Basic materials	1,067.22	-0.54	-0.91	-0.91	-2.58	18.77	0.95 KWD	1.89	11.43
Health care	816.20	1.97	1.93	1.93	3.29	-1.26	0.40 KWD	3.72	39.71
Consumer services	763.93	0.00	-0.98	-0.98	-2.58	2.35	0.53 KWD	0.89	9.52
Insurance	1,393.69	0.05	-0.79	-0.79	0.59	20.54	0.53 KWD	0.93	9.44
Consumer Disc	1,025.20	0.07	-0.98	-0.98	5.21	25.24	0.23 KWD	1.31	8.56
Energy	1,414.59	-0.44	-0.11	-0.11	-1.10	10.75	0.29 KWD	1.04	14.21
Technology	742.05	-0.97	-1.92	-1.92	-9.74	47.61	0.01 KWD	0.86	0.00
Utilities	594.74	0.00	-0.44	-0.44	-0.88	-18.41	0.25 KWD	3.55	20.11



What Move the GCC markets ,

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,209.42	0.42	1.62	1.62	1.88	28.78	9,752 SAR	2.77	21.97
Qatar (QE Index)	10,908.11	0.46	1.44	1.44	1.65	4.52	555 QAR	1.62	18.02
Dubai (DFMGI)	2,820.37	0.25	1.98	1.98	0.35	13.18	309 AED	1.54	12.28
Abu Dhabi (ADI)	7,419.27	0.17	1.38	1.38	8.54	47.05	1,311 AED	1.96	11.49
Bahrain (BAX)	1,614.91	0.29	1.12	1.12	1.70	8.40	16 BHD	1.21	23.26
MUSCAT SE INDEX	4,002.02	0.21	-0.70	-0.70	-1.51	9.38	5 OMR	0.92	13.25
Developed Markets									
MSCI World Index	3,085.83	-0.22	0.54	0.54	2.27	14.71			
U.S. (S&P 500)	4,402.66	0.33	0.17	0.17	2.45	17.21			
U.K. (FTSE 100)	7,115.91	-0.11	1.19	1.19	1.11	10.14			
Japan (Topix)	1,928.98	0.39	1.47	1.47	-0.75	6.89			
Emerging Markets									
MSCI EM Index	1,303.99	0.76	2.05	2.05	-5.14	0.99			
China (SSE Composite)	3,466.55	-0.31	2.04	2.04	-3.47	-0.19			
India (Sensex)	54,492.84	0.23	3.62	3.62	3.83	14.12			

Oil Prices

Oil prices rose more than 1% on Tuesday, recouping some of the losses in the previous session when prices hit a three-week low, but gains are likely to be limited on worries that rising Covid-19 cases and restrictions in China will dent fuel demand.

Kuwait Market

The market closed up by 0.36%, value traded 51.8 million KD, Premier market value traded reached 30.3 million KD and closed at 7,153 change by 0.46%.

Saudi Market

The Market closed down today by 0.42%, with positive macroeconomic sentiments .

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



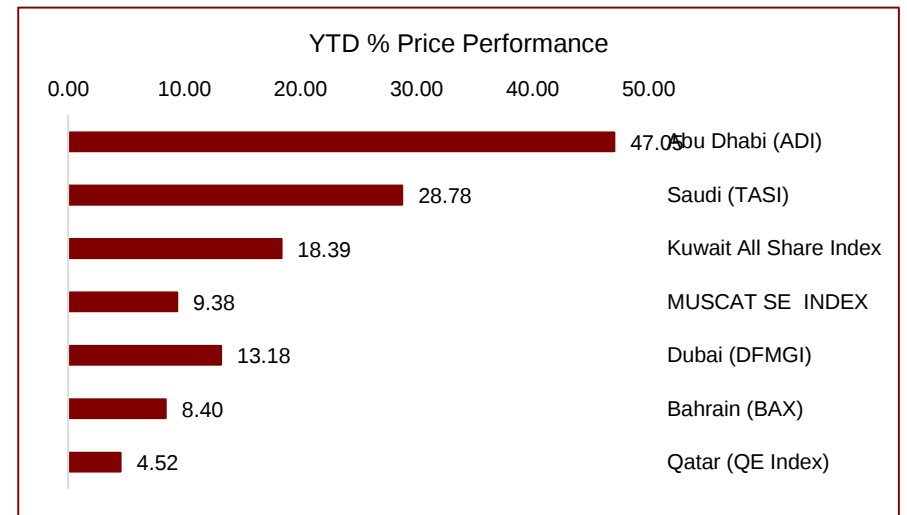
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	0.891	0.34	-0.34	-0.34	4.95	11.38	6.41 KWD	1.69	27.00
KFH	0.785	0.51	0.00	0.00	3.43	27.55	6.63 KWD	3.13	32.00
Zain	0.589	0.17	-0.34	-0.34	0.00	-2.81	2.55 KWD	2.20	13.58
BOUBYAN BANK	0.758	0.26	-5.25	-5.25	3.55	40.12	2.41 KWD	3.48	34.00
Agility	0.973	0.52	-1.32	-1.32	5.99	58.33	2.17 KWD	1.77	48.05
Saudi Arabia									
ARAMCO	35.05	0.43	0.72	0.72	0.00	0.29	6,990.37 SAR	6.91	35.07
SABIC	125.20	0.64	3.31	3.31	2.63	23.27	372.62 SAR	2.17	35.00
STC	137.80	0.44	2.39	2.39	4.26	29.43	273.21 SAR	4.19	24.51
AL-RAJHI BANK	117.20	-0.68	5.41	5.41	5.41	58.97	294.52 SAR	4.97	23.23
NCB	57.50	0.35	4.36	4.36	-0.35	32.41	256.16 SAR	2.06	14.77
United Arab Emirates									
ETISALAT.AD	24.00	-0.58	5.26	5.26	9.09	42.01	208.72 AED	4.43	22.81
FAB.AD	16.64	-0.36	0.36	0.36	-0.36	28.99	181.71 AED	1.72	16.95
EMIRATES NBD	13.40	1.13	0.00	0.00	1.13	30.10	84.64 AED	1.01	12.01
DB ISLAMIC BK	5.07	-0.20	4.97	4.97	5.19	9.98	36.71 AED	0.99	15.39
EMAAR PROPERT	4.08	0.74	2.51	2.51	-1.92	15.58	29.21 AED	0.52	11.76
Qatar									
QNB	18.32	0.60	0.44	0.44	1.84	2.52	169.21 QAR	1.75	14.77
INDUSTRIES QAT	13.37	0.30	0.15	0.15	0.91	23.00	80.89 QAR	2.43	24.93
QA ISLAMIC BK	17.30	0.58	0.46	0.46	0.06	1.11	40.88 QAR	1.78	13.42
MASRAF AL RAYA	4.45	0.45	2.89	2.89	-0.31	-1.88	33.38 QAR	2.34	14.87
MESAIEED PETRO	1.99	0.30	4.08	4.08	5.74	-2.78	25.00 QAR	1.60	29.18
OMAN									
BANK MUSCAT	0.446	0.00	-0.89	-0.89	4.72	23.33	1.59 OMR	0.77	8.33
OMANTEL	0.792	1.54	0.00	0.00	-0.50	9.39	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	0.178	0.00	-3.78	-3.78	-11.00	11.25	0.29 QAR	0.53	12.71
OMINVEST	0.318	0.00	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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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

Premier Market closed week ended at 05st Aug 21 down by -11.25 points (-0.16%) WTD holding above 7.15k.

Worries about the impact of Covid on global growth continued to weigh on investor sentiment, with countries grappling with the spread of the highly transmissible delta variant of the virus. Gold, Silver declined on strong US labor market Dollar index in Uptrend , and oil prices fell 4% amid fears that a wave of Covid cases could lead to a demand slowdown

Basic Material ,Telecom and industrial sector underperform the market while Financial and Real Estate outperform .

KSA

Saudi Armco has positive performance today by 0.43 %, SABIC have positive performance today by +0.64%

STC have positive performance today by + 0.44 %, Al Rajhi Bank has a negative performance today by 0.68 %

UAE

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



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