



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MORNING BRIEF

Tuesday, May 18, 2021

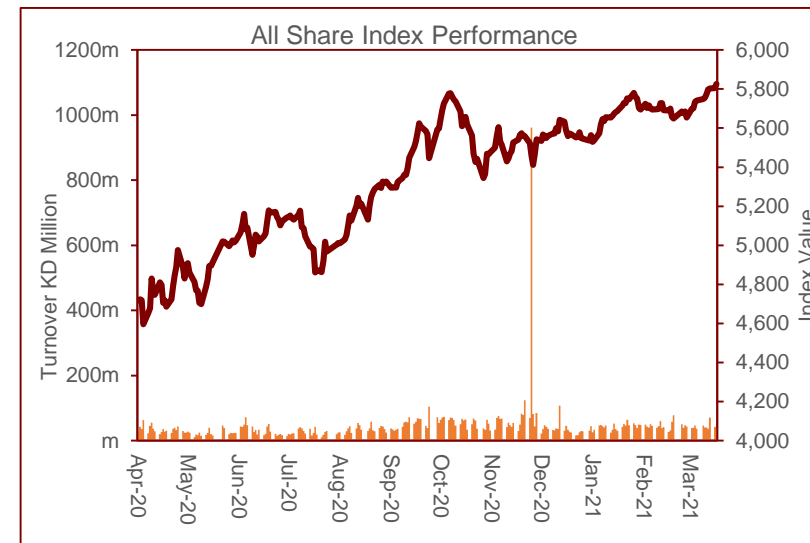


Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,308.97	-0.07	0.39	3.10	9.13	13.66	37.07 KWD	2.07	38.27
Kuwait Premier Index	6,830.63	-0.10	0.51	3.05	7.91	12.79	27.69 KWD	2.20	34.91
Kuwait Main Index	5,301.15	0.05	0.03	3.28	12.99	16.33	9.38 KWD	1.64	48.43
NIC 50	7,645.45	-0.14	0.46	2.97	7.84	12.79	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,395.31	0.20	0.78	2.41	6.17	10.52	20.48 KWD	1.39	35.91
Telecom	1,099.37	-0.90	-0.73	-0.64	-1.37	-0.27	3.40 KWD	0.62	14.33
Industrials	1,161.76	-1.72	-0.57	9.12	26.16	30.37	4.23 KWD	0.87	12.02
Financial services	1,177.48	1.09	1.77	4.88	19.55	26.65	2.96 KWD	0.82	9.65
Real estate	1,194.48	-0.03	-0.60	3.92	17.48	25.39	2.57 KWD	0.70	51.83
Basic materials	1,173.71	0.06	0.08	-0.36	7.77	30.62	1.05 KWD	1.87	10.16
Health care	793.76	0.00	0.00	0.06	-2.03	-3.98	0.39 KWD	4.53	40.51
Consumer services	822.49	-0.74	2.10	11.21	16.21	10.20	0.52 KWD	0.95	11.52
Insurance	1,326.59	2.07	3.20	4.97	10.45	14.74	0.50 KWD	0.81	8.18
Consumer Disc	993.94	-1.01	0.65	10.05	17.55	21.42	0.25 KWD	1.39	9.19
Energy	1,362.06	-1.04	-0.73	4.20	11.16	6.63	0.29 KWD	0.98	14.54
Technology	756.60	-0.95	1.96	-2.80	26.83	50.51	0.01 KWD	0.87	0.00
Utilities	668.42	0.00	0.00	-0.39	-5.22	-8.30	0.28 KWD	4.01	22.79

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,423.51	0.26	0.82	-0.12	5.04	19.76	9,666 SAR	2.55	21.79
Qatar (QE Index)	10,809.12	0.14	-1.12	-1.00	3.86	3.52	551 QAR	1.68	19.96
Dubai (DFMGI)	2,704.84	1.19	0.33	3.82	6.06	8.54	294 AED	1.48	30.84
Abu Dhabi (ADI)	6,528.39	0.78	5.14	7.96	10.42	29.40	928 AED	1.75	12.45
Bahrain (BAX)	1,536.11	0.48	0.48	3.45	5.35	3.11	16 BHD	1.44	15.76
MUSCAT SE INDEX	3,847.29	0.19	0.31	2.29	3.74	5.15	5 OMR	0.84	13.25
Developed Markets									
MSCI World Index	2,928.68	-1.70	-0.15	-0.16	4.36	9.08			
U.S. (S&P 500)	4,127.83	-2.48	-0.25	-0.43	4.79	10.84			
U.K. (FTSE 100)	7,034.24	-1.34	0.21	1.27	5.14	9.26			
Japan (Topix)	1,907.74	1.54	1.29	0.50	-2.37	5.71			
Emerging Markets									
MSCI EM Index	1,311.45	0.30	0.30	-2.68	-0.38	1.56			
China (SSE Composite)	3,529.01	0.32	1.11	2.38	2.53	1.61			
India (Sensex)	50,193.33	1.24	3.01	2.90	1.39	5.12			

Sources, Bursa Kuwait , Refinitiv , NIC.



What Move the GCC markets ,

Oil Prices

Oil prices climbed on Tuesday, extending gains from the previous day, as optimism over the reopening's of the U.S. and European economies outweighed fears of slower fuel demand in Asia due to surging COVID-19 cases and a new wave of restrictions. Brent crude oil futures were up 42 cents, or 0.6%, at \$69.88 a barrel

Kuwait Market

The market closed today down by 0.07%, value traded 82.6 million KD, Premier market value traded reached 45.1 million KD and closed at 6,830 change by 0.10%.

Saudi Market

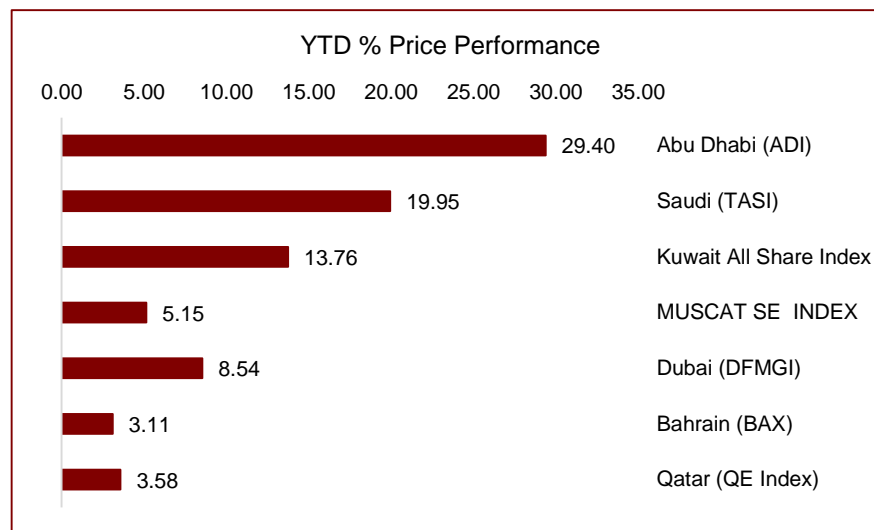
The Market closed up by 0.26% , today market Performance is linked to oil prices raised to \$69.

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	0.839	0.24	0.72	1.82	3.84	4.75	6.02 KWD	1.56	27.00
KFH	0.740	0.54	1.51	2.35	5.99	20.24	6.21 KWD	3.30	32.00
Zain	0.600	-0.50	-0.33	-0.50	-0.83	-0.99	2.61 KWD	2.33	14.33
BOUBYAN BANK	0.664	1.07	0.61	1.37	15.24	22.75	2.09 KWD	3.43	34.00
Agility	1.050	-3.49	-0.85	10.76	44.63	55.33	2.21 KWD	1.82	49.10
Saudi Arabia									
ARAMCO	35.55	0.00	-0.70	0.42	-1.25	1.57	7,110.00 SAR	7.03	35.77
SABIC	123.80	0.16	0.81	-0.16	5.45	22.09	370.80 SAR	2.16	35.00
STC	121.20	-0.17	-0.16	-4.57	-4.42	14.34	242.40 SAR	3.72	22.00
AL-RAJHI BANK	102.40	1.38	2.71	3.54	3.64	39.13	254.00 SAR	4.29	21.58
NCB	54.50	0.93	0.93	-4.05	2.64	25.72	241.81 SAR	1.94	14.00
United Arab Emirates									
ETISALAT.AD	22.14	1.19	2.69	4.53	2.31	31.01	190.30 AED	4.26	20.69
FAB.AD	16.48	1.35	13.03	15.73	12.88	27.75	177.57 AED	1.73	17.27
EMIRATES NBD	12.75	1.19	1.19	2.41	10.87	23.79	79.59 AED	0.96	12.16
DB ISLAMIC BK	4.58	0.44	0.66	2.92	0.66	-0.65	33.02 AED	0.91	13.33
EMAAR PROPERT	3.91	0.77	-2.25	4.83	10.45	10.76	27.78 AED	0.50	11.27
Qatar									
QNB	17.90	0.34	-0.56	0.00	-0.50	0.39	165.00 QAR	1.78	15.34
INDUSTRIES QAT	12.89	-0.08	-4.16	-4.38	7.87	18.58	78.15 QAR	2.35	24.12
QA ISLAMIC BK	17.29	0.70	-0.12	-0.69	4.98	0.99	40.63 QAR	1.83	13.88
MASRAF AL RAYA	4.46	-0.65	0.13	0.27	4.43	-1.10	33.71 QAR	2.46	15.28
MESAIEED PETRO	1.91	-0.05	-0.73	-1.09	2.63	-6.74	23.99 QAR	1.53	28.04
OMAN									
BANK MUSCAT	0.396	0.00	-1.00	1.54	3.13	10.00	1.42 OMR	0.70	8.33
OMANTEL	0.792	-1.49	-2.46	2.59	0.51	9.39	0.60 OMR	1.13	7.69
BANK DHOFAR	0.112	3.70	5.66	2.75	5.66	15.46	0.32 QAR	0.46	14.93
NAT BANK OF OMAN	0.163	0.00	5.16	3.16	8.67	1.88	0.27 QAR	0.49	12.71
OMINVEST	0.300	0.00	-3.23	-3.23	-6.25	-11.24	0.24 QAR	0.93	6.85



Leading Sector Performance

The market is down today by - 0.07 % The leading sector bottom performance indices today are Industrials -1.72 % Energy -1.04 % Consumer Disc -1.01 % respectively

from YTD performance perspective the best sector performance is Basic materials by 30.62 % while the bottom sector performance is Utilities by -8.3 %

Telecommunication sector are down today by -0.9 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -13.93 %

KSA

Saudi Armco flat performance today 0 %, SABIC have positive performance today by + 0.16 %

STC performance was down today by - 0.17 %, Al Rajhi Bank has a positive performance today by + 1.38 %

UAE

ETISALAT AD closed today up by 1.19 % and act defensively with COVID19

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
5-May-21	19.83%	11.62%	0.06%	1.07%	0.32%	4.49%	2.67%	10.21%	5.01%	4.17%
12-May-21	19.83%	11.65%	0.06%	1.07%	0.31%	4.60%	2.69%	10.21%	5.02%	4.19%

End of Report

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