



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, September 23, 2021

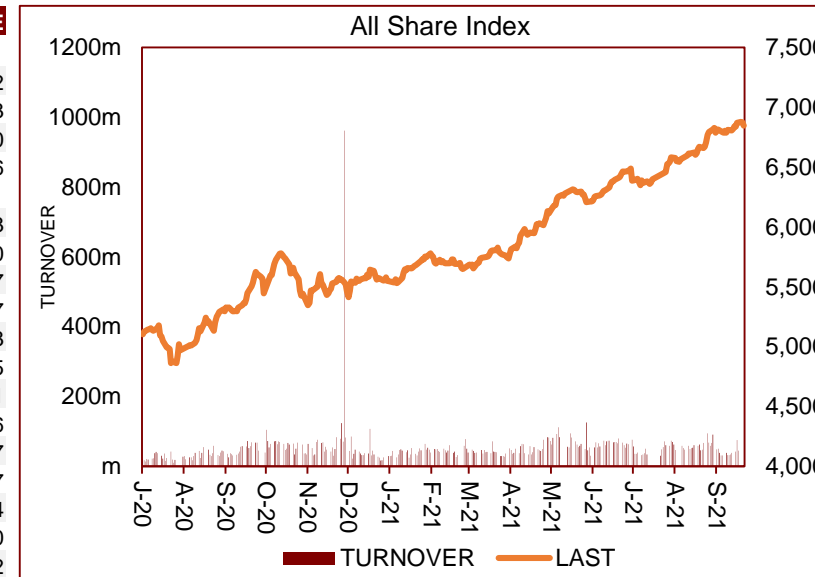




Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,876.00	0.45	0.09	1.31	7.66	23.98	40.29 KWD	2.65	26.92
Kuwait Premier Index	7,516.72	0.47	-0.11	0.96	8.17	23.99	30.36 KWD	2.32	28.33
Kuwait Main Index	5,609.09	0.37	0.10	1.80	5.44	23.15	9.93 KWD	3.65	22.70
NIC 50	8,362.44	0.47	-0.16	0.88	8.10	23.99	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,582.35	0.57	0.08	1.39	9.28	25.34	23.22 KWD	1.30	29.33
Telecom	1,100.60	0.30	-0.01	-1.16	1.87	-0.16	3.37 KWD	0.70	13.00
Industrials	1,166.95	0.05	-0.14	0.11	3.08	30.96	4.13 KWD	0.88	11.47
Financial services	1,311.55	0.27	0.24	4.09	13.40	41.07	3.25 KWD	0.81	10.97
Real estate	1,280.27	0.70	0.09	2.96	8.05	34.39	2.74 KWD	0.69	28.13
Basic materials	1,074.18	-0.13	0.75	-0.80	-1.94	19.54	0.96 KWD	1.94	11.75
Health care	791.65	-0.49	-0.83	-0.01	0.19	-4.23	0.39 KWD	4.50	13.31
Consumer services	774.23	-0.04	1.85	4.62	-1.27	3.73	0.57 KWD	1.05	9.96
Insurance	1,450.66	0.45	0.26	-0.60	4.70	25.47	0.60 KWD	0.80	9.67
Consumer Disc	1,110.45	0.53	-0.06	1.89	13.96	35.65	0.24 KWD	1.37	9.67
Energy	1,374.21	0.77	0.79	0.89	-3.93	7.58	0.28 KWD	1.02	14.44
Technology	727.50	5.26	1.01	-0.20	-11.50	44.72	0.01 KWD	0.81	0.00
Utilities	623.68	0.00	0.42	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)	11,270.57	-0.40	-1.33	-0.43	2.61	29.70	9,781 SAR	2.73	20.16
Qatar (QE Index)	11,240.53	0.56	0.56	1.36	4.78	7.74	563 QAR	1.71	16.32
Dubai (DFMGI)	2,839.57	-0.15	-2.12	-2.18	1.03	13.95	313 AED	1.55	19.38
Abu Dhabi (ADI)	7,824.79	0.55	-0.74	1.82	14.47	55.09	1,348 AED	1.77	24.52
Bahrain (BAX)	1,702.49	0.59	1.39	3.47	7.21	14.28	17 BHD	1.17	11.04
MUSCAT SE INDEX	3,927.08	0.25	-0.20	-1.00	-3.35	7.33	5 OMR	0.89	13.25
Developed Markets									
MSCI World Index	3,074.35	0.81	-0.72	-2.13	1.89	14.29			
U.S. (S&P 500)	4,395.64	0.33	-0.84	-2.81	2.28	17.03			
U.K. (FTSE 100)	7,092.75	0.13	1.85	-0.38	0.79	9.79			
Japan (Topix)	2,043.55	-1.02	-2.70	4.23	5.14	13.24			
Emerging Markets									
MSCI EM Index	1,262.79	0.11	-1.29	-3.51	-8.14	-2.20			
China (SSE Composite)	3,642.22	0.38	0.78	2.77	1.42	4.87			
India (Sensex)	59,885.36	1.63	1.47	4.05	14.10	25.40			



What Move the GCC markets ,

Oil Prices

Oil prices extended gains on Thursday, riding higher on growing fuel demand and a bigger-than-expected draw in U.S. crude inventories as production remains hampered in the Gulf of Mexico after two hurricanes. Brent crude rose 18 cents, or 0.2%, to \$76.37 a barrel.

Kuwait Market

The market closed up today by + 0.45%, value traded 56.0 million KD, Premier market value traded reached 31.9 million KD and closed at 7,516 change by + 0.47%.

Saudi Market

The Market closed down today by - 0.40%, with positive macroeconomic sentiments bounce of oil reaching \$76.37 or +0.2%.



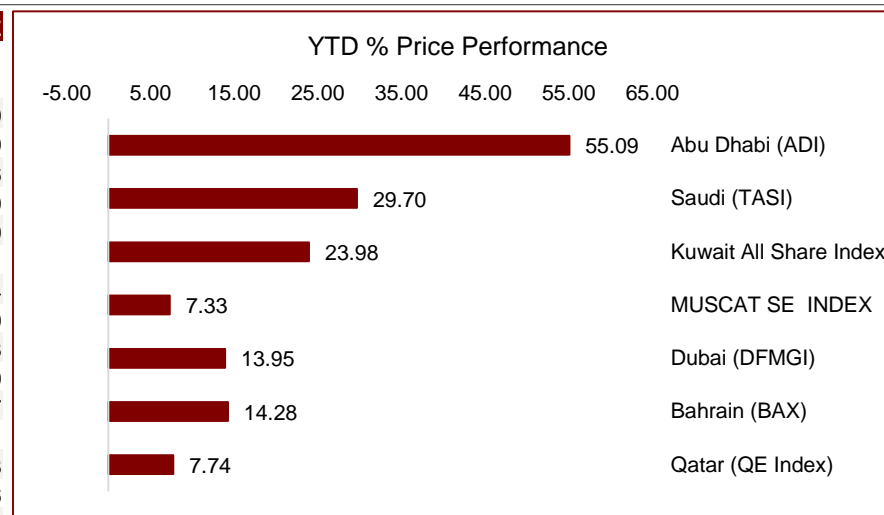
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.960	0.73	-0.42	2.14	12.60	19.50	6.86 KWD	1.81	27.00
KFH	0.825	0.24	-0.84	-0.36	8.43	33.72	6.95 KWD	3.28	32.00
Zain	0.602	0.33	-0.17	-1.80	1.87	-0.99	2.60 KWD	2.24	13.86
BOUBYAN BANK	0.771	0.52	-1.41	-1.66	5.19	42.34	2.44 KWD	3.52	34.00
Agility	0.989	0.00	-0.10	-1.10	7.63	60.77	2.21 KWD	1.78	27.60
Saudi Arabia									
ARAMCO	34.95	0.14	-0.57	-0.57	-0.43	-0.14	6,990.93 SAR	6.79	26.34
SABIC	122.20	-0.81	-1.29	-0.65	0.33	20.51	366.65 SAR	2.16	35.00
STC	130.60	-0.31	-1.51	-3.26	-0.76	23.21	261.23 SAR	4.08	23.68
AL-RAJHI BANK	121.00	-0.98	-1.94	0.00	9.01	64.40	302.54 SAR	5.07	23.90
NCB	59.80	-0.83	-2.76	-1.64	3.82	37.95	267.82 SAR	1.66	16.57
United Arab Emirates									
ETISALAT.AD	24.56	0.99	-1.37	4.07	11.64	45.33	211.51 AED	4.49	22.98
FAB.AD	18.40	0.66	-1.60	8.24	10.18	42.64	199.62 AED	1.89	18.56
EMIRATES NBD	14.00	0.00	-1.75	1.08	5.66	35.92	88.43 AED	1.06	12.68
DB ISLAMIC BK	4.92	-0.81	-1.99	-3.53	2.07	6.72	35.91 AED	0.97	15.03
EMAAR PROPERT	4.07	-0.25	-3.10	-3.10	-2.16	15.30	29.21 AED	0.52	13.46
Qatar									
QNB	19.10	0.53	-1.35	-0.68	6.07	6.79	173.93 QAR	1.82	15.42
INDUSTRIES QAT	14.18	2.01	5.27	10.35	7.02	30.45	83.35 QAR	2.38	16.72
QA ISLAMIC BK	17.98	0.00	-1.10	-1.69	4.05	5.14	42.11 QAR	1.85	14.03
MASRAF AL RAYA	4.45	-0.07	0.18	-2.20	-0.20	-1.77	33.07 QAR	2.34	14.93
MESAIEED PETRO	2.22	-0.80	2.00	12.15	19.18	9.58	27.87 QAR	1.74	21.52
OMAN									
BANK MUSCAT	0.442	0.00	0.45	0.45	4.25	22.78	1.58 OMR	0.77	8.33
OMANTEL	0.748	0.54	-0.53	-1.06	-6.03	3.31	0.56 OMR	1.01	7.69
BANK DHOFAR	0.118	0.00	0.00	0.00	-5.60	21.65	0.35 QAR	0.51	14.93
NAT BANK OF OMAN	0.185	0.00	-2.63	-1.60	-7.50	15.63	0.30 QAR	0.55	12.71
OMINVEST	0.310	0.00	-0.64	-2.52	-0.64	-8.28	0.25 QAR	0.92	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
15-Sep-21	20.77%	10.56%	0.06%	0.35%	0.36%	4.68%	2.72%	10.92%	5.22%	4.19%
22-Sep-21	20.89%	9.91%	0.06%	0.37%	0.38%	4.58%	2.61%	11.00%	5.25%	4.11%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is up today by + 0.45 %The leading sector best performance indices today are Energy 0.77 % Real estate 0.7 % Banking 0.57 % 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 up today by + 0.3 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -24.14 %

KSA

Saudi Armco has a positive performance today by + 0.14 %, SABIC have negative performance today by -0.81 %

STC have negative performance today by -0.31 %, Al Rajhi Bank have negative performance today by -0.98 %

UAE

ETISALAT AD closed up today by + 0.99%, and act defensively with COVID19



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