



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, November 28, 2021

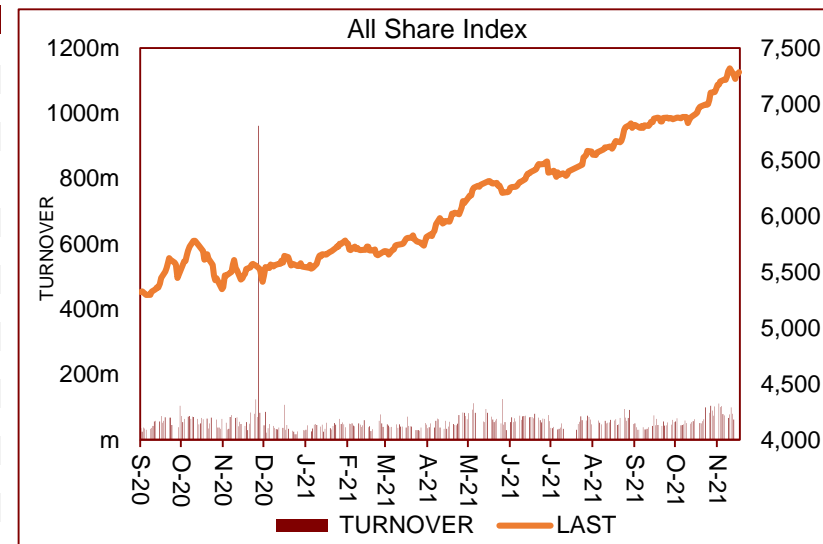




Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,928.74	-2.80	-4.78	-2.43	1.02	25.04	42.33 KWD	2.08	26.30
Kuwait Premier Index	7,512.80	-2.68	-4.62	-2.26	0.30	24.26	31.63 KWD	2.25	26.71
Kuwait Main Index	5,795.74	-3.14	-3.03	-2.94	3.27	27.46	10.70 KWD	1.59	25.18
NIC 50	8,852.99	0.44	-4.67	-2.34	0.23	24.26	28.60 KWD	2.23	25.71
Kuwait Sector									
Banking	1,591.82	-2.44	-2.44	-1.73	0.99	26.09	24.28 KWD	1.24	27.71
Telecom	1,077.35	-1.22	-1.22	-2.34	-1.67	-2.26	3.35 KWD	0.95	15.11
Industrials	1,145.84	-4.05	-4.05	-4.76	-1.82	28.59	4.23 KWD	1.00	14.65
Financial services	1,375.27	-4.01	-4.01	-4.38	4.27	47.92	3.70 KWD	0.91	11.67
Real estate	1,299.56	-4.62	-4.62	-5.09	1.57	36.42	2.94 KWD	0.79	57.05
Basic materials	1,036.56	-2.54	-2.54	-5.73	-4.79	15.35	0.95 KWD	1.81	28.44
Health care	798.89	0.00	0.00	0.51	0.38	-3.36	0.40 KWD	6.16	12.15
Consumer services	738.94	-0.65	-0.65	-4.77	-5.69	-0.99	0.70 KWD	0.91	15.97
Insurance	1,587.17	-0.44	-0.44	7.43	9.45	37.28	0.66 KWD	0.83	8.35
Consumer Disc	1,262.08	-5.54	-5.54	-0.15	12.97	54.18	0.23 KWD	1.36	9.09
Energy	1,401.51	-3.63	-3.63	-3.93	1.79	9.72	0.30 KWD	1.08	16.12
Technology	771.15	0.00	0.00	0.00	7.94	53.40	0.01 KWD	0.91	0.00
Utilities	615.79	0.00	-2.09	-0.85	-1.27	-15.52	0.26 KWD	4.24	20.31

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,787.79	-4.53	-3.93	-7.26	-5.58	24.51	9,956 SAR	2.50	18.37
Qatar (QE Index)	11,463.91	-2.77	-4.12	-2.61	-0.24	9.79	594 QAR	1.68	16.17
Dubai (DFMGI)	3,006.47	-5.17	-7.92	4.97	5.66	20.65	316 AED	1.60	24.01
Abu Dhabi (ADI)	8,299.94	-1.82	-0.59	5.53	7.81	64.51	1,447 AED	1.84	23.31
Bahrain (BAX)	1,744.64	-1.94	-2.59	0.09	2.29	17.11	18 BHD	1.57	9.85
MUSCAT SE INDEX	4,118.22	0.28	1.34	1.06	4.46	12.56	5 OMR	0.88	13.25
Developed Markets									
MSCI World Index	3,131.98	-2.20	-2.73	-1.35	4.17	16.43			
U.S. (S&P 500)	4,594.62	0.33	-2.20	-0.23	6.66	22.33			
U.K. (FTSE 100)	7,044.03	-3.64	-2.49	-2.67	-0.60	9.03			
Japan (Topix)	1,984.98	-2.01	-2.91	-0.81	-2.23	9.99			
Emerging Markets									
MSCI EM Index	1,223.13	-2.52	-3.63	-3.29	-2.39	-5.28			
China (SSE Composite)	3,564.09	-0.56	0.10	0.47	-0.11	2.62			
India (Sensex)	57,107.15	-2.87	-4.24	-3.71	-3.42	19.59			



What Move the GCC markets ,

Oil Prices

Oil posted its worst day of the year on Friday, tumbling to the lowest level in more than two months as the new Covid-19 strain sparked fears about a demand slowdown just as supply increases, International benchmark Brent crude futures slid 11.55% to settle at \$72.72 per barrel.

Kuwait Market

The market closed today down by -2.80%, value traded 90.2 million KD, Premier market value traded reached 62.2 million KD and closed at 7,512.80 down by -2.68%.

Saudi Market

The Market closed down by -4.53%, with positive macroeconomic sentiments bounce of oil reaching \$72.72.

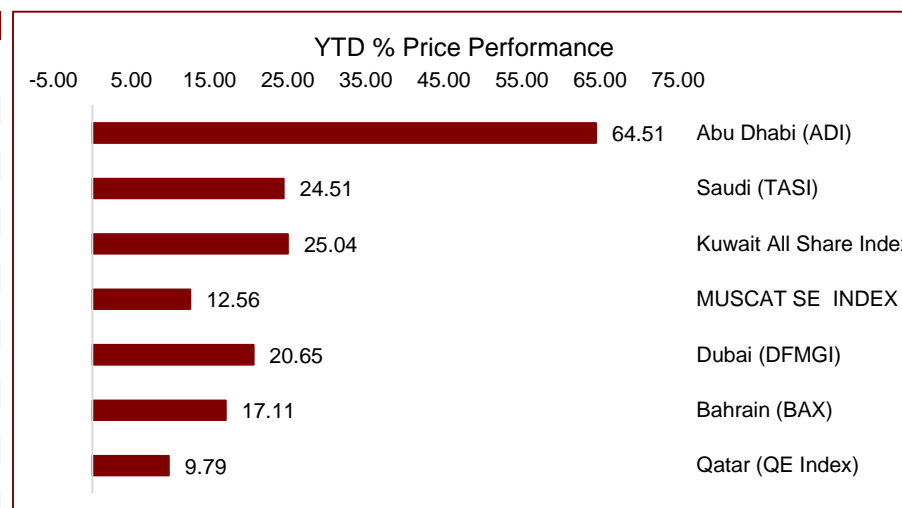


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.995	-2.16	-3.96	0.51	4.41	24.38	7.32 KWD	1.89	27.00
KFH	0.814	-2.40	-3.66	-2.51	-0.85	32.42	7.04 KWD	3.24	32.00
Zain	0.583	-1.19	-2.01	-2.50	-2.50	-3.63	2.55 KWD	2.15	13.51
BOUBYAN BANK	0.787	-1.01	-3.67	0.38	2.60	45.67	2.53 KWD	3.60	34.00
Agility	0.948	-4.91	-8.92	-3.85	-3.55	54.59	2.22 KWD	1.02	2.12
Saudi Arabia									
ARAMCO	34.90	-1.97	-5.16	-7.92	-3.06	-0.29	7,120.00 SAR	6.66	21.78
SABIC	112.00	-6.20	-10.22	-11.36	-11.77	10.85	358.20 SAR	2.06	35.00
STC	111.60	-1.24	-3.82	-3.82	-12.76	4.53	226.00 SAR	3.29	20.18
AL-RAJHI BANK	133.80	-5.37	-6.63	-2.73	10.28	83.70	353.50 SAR	5.55	25.62
NCB	61.00	-5.13	-11.32	-6.29	-0.49	40.95	287.94 SAR	1.79	18.91
United Arab Emirates									
ETISALAT.AD	29.30	-3.30	4.72	14.45	21.98	73.37	263.51 AED	5.72	28.55
FAB.AD	18.90	-1.36	-4.06	6.18	6.30	46.51	209.23 AED	1.91	17.22
EMIRATES NBD	12.90	-1.90	-9.15	-6.18	-9.15	25.24	83.06 AED	0.97	10.41
DB ISLAMIC BK	5.14	-3.93	-7.22	0.59	3.84	11.50	38.74 AED	1.02	14.27
EMAAR PROPERT	4.45	-9.37	-13.09	10.15	9.07	26.06	40.16 AED	0.62	12.74
Qatar									
QNB	20.00	-2.91	-5.67	-2.89	3.45	11.10	190.27 QAR	1.90	16.16
INDUSTRIES QAT	14.76	-4.28	-6.09	-8.64	-4.21	36.15	93.29 QAR	2.49	14.00
QA ISLAMIC BK	17.83	-1.71	-1.76	-2.03	-2.30	4.21	42.86 QAR	1.79	13.53
MASRAF AL RAYA	4.68	-2.50	-3.99	-0.11	4.82	3.64	36.00 QAR	2.43	16.17
MESAIEED PETRO	2.11	-4.52	-8.61	-3.95	-6.38	3.22	27.78 QAR	1.66	16.94
OMAN									
BANK MUSCAT	0.506	0.00	2.01	4.53	12.89	41.11	1.82 OMR	0.86	8.33
OMANTEL	0.744	1.09	-0.54	-3.66	-0.54	1.66	0.55 OMR	0.98	7.69
BANK DHOFAR	0.133	0.00	0.76	2.31	13.68	37.11	0.40 QAR	0.56	14.93
NAT BANK OF OMAN	0.194	0.00	2.65	0.00	4.86	21.25	0.32 QAR	0.57	12.71
OMINVEST	0.312	0.00	-0.64	0.65	-0.64	-7.69	0.25 QAR	0.91	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
17-Nov-21	20.92%	11.68%	0.06%	0.29%	0.41%	4.63%	2.76%	10.64%	5.28%	4.33%
24-Nov-21	20.96%	11.72%	0.06%	0.30%	0.42%	4.61%	2.76%	10.61%	5.30%	4.36%

End of Report

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Leading Sector Performance

The market is down today by -2.8 % The leading sector bottom performance indices today are Consumer Disc -5.54 % Real estate -4.62 % Industrials -4.05 % respectively

Telecommunication sector are down today by -1.22 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -27.3 %

KSA

Saudi Armco have negative performance today by -1.97 %, SABIC has a negative performance today by -6.20 %

STC has a negative performance today by -1.24 %, Al Rajhi Bank has a negative performance today by -5.37 %

UAE

ETISALAT AD closed down today by -3.30 %, and act defensively with COVID19



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