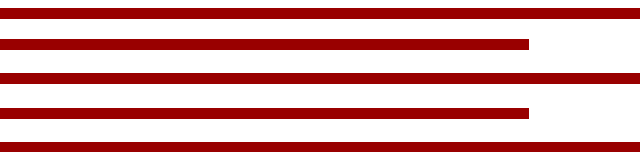


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY



GCC DAILY MORNING BRIEF

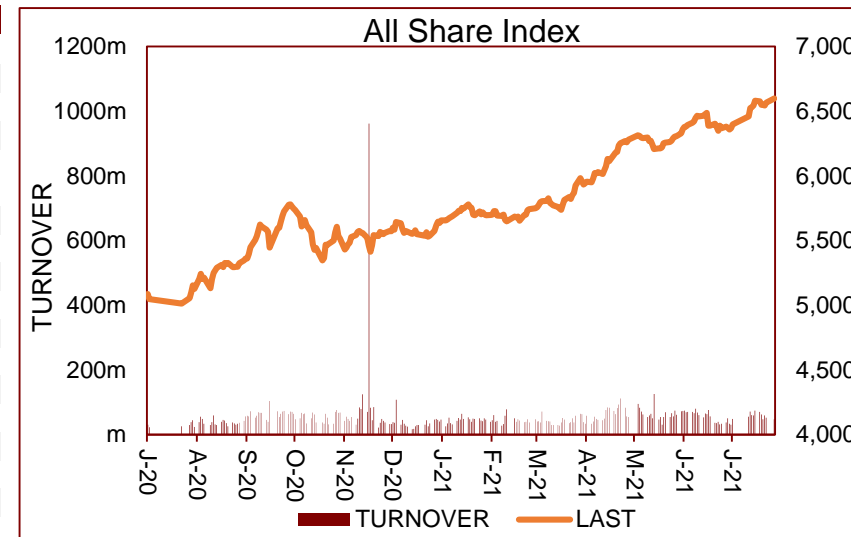
Tuesday, August 10, 2021



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,596.57	0.47	0.37	0.14	3.18	18.82	38.63 KWD	2.09	31.54
Kuwait Premier Index	7,189.90	0.51	0.34	0.19	3.49	18.62	29.05 KWD	2.23	32.75
Kuwait Main Index	5,430.70	0.34	0.37	-0.09	2.17	19.33	9.59 KWD	1.69	28.09
NIC 50	8,013.64	0.56	0.29	0.11	3.42	18.62	28.60 KWD	1.57	15.56
Kuwait Sector									
Banking	1,502.04	0.53	0.53	0.10	3.73	18.98	22.06 KWD	1.37	33.75
Telecom	1,085.45	0.42	0.42	-0.41	0.46	-1.53	3.32 KWD	0.72	13.61
Industrials	1,152.78	0.19	0.19	-0.59	1.83	29.37	4.09 KWD	0.83	14.46
Financial services	1,248.81	0.48	0.48	2.63	7.97	34.32	3.11 KWD	0.80	9.54
Real estate	1,222.91	0.88	0.88	1.13	3.21	28.37	2.62 KWD	0.69	38.71
Basic materials	1,063.25	-0.37	-0.37	-1.28	-2.94	18.32	0.95 KWD	1.89	11.43
Health care	814.99	-0.15	-0.15	1.78	3.14	-1.41	0.41 KWD	3.72	39.71
Consumer services	761.55	-0.31	-0.31	-1.29	-2.89	2.04	0.53 KWD	0.88	7.44
Insurance	1,406.96	0.95	0.95	0.16	1.55	21.69	0.54 KWD	0.93	9.44
Consumer Disc	1,027.83	0.26	0.26	-0.73	5.48	25.56	0.23 KWD	1.31	8.56
Energy	1,409.96	-0.33	-0.33	-0.44	-1.43	10.38	0.30 KWD	1.04	14.08
Technology	749.33	0.98	0.98	-0.96	-8.85	49.06	0.01 KWD	0.86	0.00
Utilities	600.00	0.00	0.88	0.44	0.00	-17.69	0.25 KWD	3.55	20.20

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,299.87	0.91	0.81	2.61	2.87	30.04	9,796 SAR	2.82	21.17
Qatar (QE Index)	10,913.04	-0.25	0.01	1.45	1.66	4.54	555 QAR	1.57	16.35
Dubai (DFMGI)	2,816.67	-0.24	-0.13	1.84	0.22	13.03	309 AED	1.54	12.30
Abu Dhabi (ADI)	7,558.74	-0.19	1.88	3.29	10.58	49.82	1,339 AED	2.00	21.99
Bahrain (BAX)	1,617.93	0.40	0.19	1.31	1.89	8.60	16 BHD	1.21	23.29
MUSCAT SE INDEX	4,000.10	-0.18	-0.05	-0.75	-1.56	9.33	5 OMR	0.92	13.25
Developed Markets									
MSCI World Index	3,097.06	-0.03	-0.03	0.91	2.65	15.13			
U.S. (S&P 500)	4,432.35	0.33	-0.09	0.84	3.14	18.01			
U.K. (FTSE 100)	7,126.44	-0.08	0.04	1.33	1.26	10.30			
Japan (Topix)	1,936.28	0.36	0.36	1.85	-0.38	7.29			
Emerging Markets									
MSCI EM Index	1,294.20	0.13	0.13	1.28	-5.85	0.23			
China (SSE Composite)	3,529.93	1.01	2.07	3.90	-1.71	1.64			
India (Sensex)	54,554.66	0.28	0.44	3.67	3.87	14.17			



What Move the GCC markets ,

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 0.47%, value traded 47.4 million KD, Premier market value traded reached 22.2 million KD and closed at 7,190 change by 0.51%.

Saudi Market

The Market closed up today by 0.91%, with positive macroeconomic sentiments bounce of oil +1% recouping some of the losses in the previous session when prices hit a three-week low.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



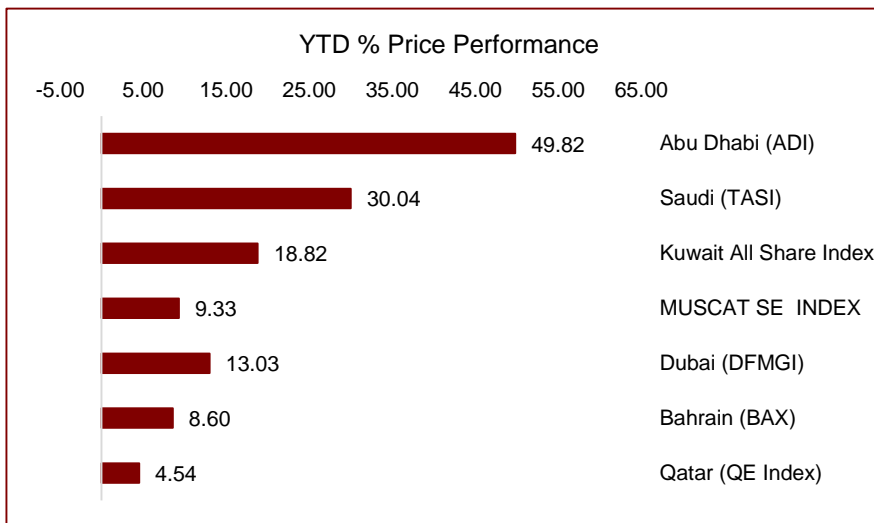
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	0.892	0.11	-0.45	-0.78	4.48	10.88	6.42 KWD	1.69	27.00
KFH	0.788	0.38	0.38	0.38	3.82	28.04	6.63 KWD	3.13	32.00
Zain	0.592	0.51	0.17	-0.17	0.17	-2.64	2.55 KWD	2.20	13.61
BOUBYAN BANK	0.777	2.51	1.85	-3.50	5.46	42.71	2.41 KWD	3.48	34.00
Agility	0.980	0.72	0.72	-0.61	6.75	59.47	2.17 KWD	1.77	48.30
Saudi Arabia									
ARAMCO	35.15	0.00	0.29	0.86	0.14	0.43	7,030.19 SAR	6.95	26.45
SABIC	123.20	1.15	-1.60	1.82	1.15	21.50	365.41 SAR	2.13	35.00
STC	137.20	0.15	-0.44	2.39	4.26	29.43	274.01 SAR	4.20	24.39
AL-RAJHI BANK	119.00	0.68	1.54	7.21	7.21	61.68	295.51 SAR	4.95	23.19
NCB	59.60	3.47	3.65	8.36	3.47	37.49	257.94 SAR	2.07	16.25
United Arab Emirates									
ETISALAT.AD	24.00	-0.17	0.00	5.26	9.09	42.01	209.08 AED	4.44	22.71
FAB.AD	16.84	-0.36	1.20	1.57	0.84	30.54	184.55 AED	1.74	17.16
EMIRATES NBD	13.60	0.00	1.49	1.49	2.64	32.04	85.91 AED	1.03	12.32
DB ISLAMIC BK	5.03	-0.79	-0.79	4.14	4.36	9.11	36.71 AED	0.99	15.36
EMAAR PROPERT	4.01	-0.50	-1.72	0.75	-3.61	13.60	28.85 AED	0.52	11.70
Qatar									
QNB	18.50	0.05	0.82	1.48	2.90	3.59	169.94 QAR	1.77	15.00
INDUSTRIES QAT	13.40	0.00	0.00	0.15	0.91	23.00	80.67 QAR	2.30	16.12
QA ISLAMIC BK	17.29	0.41	0.00	0.46	0.06	1.11	40.49 QAR	1.77	13.43
MASRAF AL RAYA	4.43	-0.32	-0.56	2.43	-0.76	-2.32	33.17 QAR	2.34	14.91
MESAIEED PETRO	2.00	-0.65	-0.15	3.92	5.58	-2.93	25.13 QAR	1.56	19.33
OMAN									
BANK MUSCAT	0.442	-0.45	-0.90	-1.34	4.25	22.78	1.58 OMR	0.77	8.33
OMANTEL	0.792	0.00	-0.51	-0.51	-1.00	8.84	0.59 OMR	1.07	7.69
BANK DHOFAR	0.120	-0.83	2.54	-1.63	-3.20	24.74	0.36 QAR	0.52	14.93
NAT BANK OF OMAN	0.182	0.00	2.25	-1.62	-9.00	13.75	0.30 QAR	0.54	12.71
OMINVEST	0.320	0.63	0.63	1.91	2.56	-5.33	0.26 QAR	1.00	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, Borsa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is up today by + 0.47 % The leading sector best performance indices today are Insurance 0.95 % Real estate 0.88 % Banking 0.53 % respectively.

Telecommunication sector are up today by + 0.42 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -20.35 %

from sectoral analysis performance perspective the Banking sector performance year to date are 18.98 %

KSA

Saudi Armco flat performance today 0 %, SABIC have positive performance today by + 1.15 %

STC has a positive performance today by + 0.15 %, Al Rajhi Bank has a positive performance today by + 0.68 %.

UAE

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



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw