



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, December 23, 2021





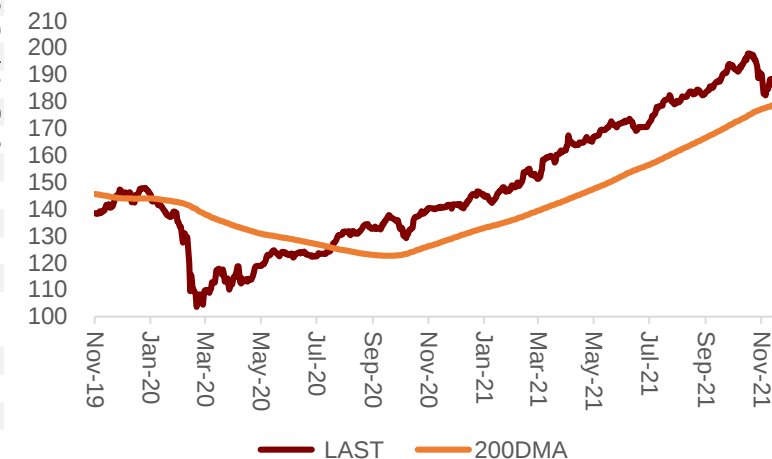
Market Watch

Thursday, December 23, 2021

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,271.46	0.60	-0.36	4.74	-1.95	29.71	9,902 SAR	2.52	17.76
Qatar (QE Index)	11,696.47	0.11	-0.20	2.44	1.55	12.1	592 QAR	1.66	15.89
Dubai (DFMGI)	3,144.53	0.58	-3.93	2.33	10.51	26.19	313 AED	1.52	23.04
Abu Dhabi (ADI)	8,431.36	0.39	-4.80	-1.35	9.52	67.11	1,430 AED	1.84	15.27
Bahrain (BAX)	1,779.51	0.11	-0.15	2.89	4.34	19.45	18 BHD	1.50	9.80
MUSCAT SE INDEX	4,124.94	0.36	2.34	3.11	4.63	12.74	5 OMR	0.87	13.25
SP GCC Comp LMC	188.07	-0.33	-1.15	3.21	1.36	34.6			
Developed Markets									
MSCI World Index	3,183.62	0.99	1.40	2.64	5.89	18.35			
U.S. (S&P 500)	4,696.56	0.33	1.64	2.84	9.03	25.04			
U.K. (FTSE 100)	7,352.52	0.15	1.11	4.13	3.73	13.78			
Japan (Topix)	1,989.43	0.91	0.25	3.17	-2.01	10.24			
Emerging Markets									
MSCI EM Index	1,209.88	0.52	-0.53	-0.21	-3.45	-6.30			
China (SSE Composite)	3,643.34	0.57	0.30	2.23	2.11	4.90			
India (Sensex)	57,315.28	0.68	0.53	0.44	-3.06	20.03			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,041.06	0.13	0.93	3.70	2.57	26.96	41.69 KWD	2.09	25.74
Kuwait Premier Index	7,649.83	0.23	1.34	4.14	2.05	26.42	31.22 KWD	2.24	26.24
Kuwait Main Index	5,854.18	-0.15	-0.28	2.37	4.19	28.59	10.47 KWD	1.61	24.34
NIC 50	8,525.85	0.12	-0.61	2.32	0.57	27.59	28.60 KWD	2.22	25.24
Kuwait Sector									
Banking	1,623.20	0.23	1.93	4.20	2.98	28.57	24.05 KWD	1.26	27.24
Telecom	1,085.76	-0.14	-0.34	2.83	-0.90	-1.50	3.33 KWD	0.91	14.83
Industrials	1,148.84	0.01	-0.31	2.70	-1.56	28.92	4.08 KWD	0.88	13.70
Financial services	1,409.97	-0.05	-0.41	4.47	6.90	51.66	3.62 KWD	0.86	12.06
Real estate	1,327.29	-0.20	-0.92	2.67	3.74	39.33	2.87 KWD	0.74	50.79
Basic materials	1,051.94	1.42	2.29	6.73	-3.37	17.07	0.92 KWD	1.94	27.26
Health care	807.01	0.00	0.11	-0.24	1.40	-2.37	0.40 KWD	6.11	12.03
Consumer services	739.27	0.04	0.32	0.88	-5.65	-0.95	0.69 KWD	0.89	15.48
Insurance	1,464.88	0.11	-0.76	-7.88	1.02	26.70	0.61 KWD	0.75	8.41
Consumer Disc	1,338.50	-0.11	-1.39	10.05	19.81	63.51	0.23 KWD	1.35	9.03
Energy	1,423.71	-0.35	-3.16	2.63	3.40	11.46	0.30 KWD	1.02	14.99
Technology	749.33	0.00	0.00	0.98	4.89	49.06	0.01 KWD	0.89	0.00
Utilities	597.37	0.00	-0.87	-2.16	-4.22	-18.05	0.25 KWD	4.03	19.29

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices shrugged off early gains on Thursday as countries imposed new travel curbs to combat surging cases, though the downside remained capped over positive developments around COVID-19.

U.S. West Texas Intermediate (WTI) crude futures were down 3 cents at \$72.73 a barrel after jumping 2.3% in the previous session. Brent crude futures advanced 6 cents, or 0.1%, to \$75.35 a barrel, after a 1.8% gain in the previous session.

Kuwait Market

The market closed today up by +0.13%, value traded 51.7 million KD, Premier market value traded reached 37.6 million KD and closed at 7,649.8 up by +0.23%.

Saudi Market

The Market closed up by 0.6%, with the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



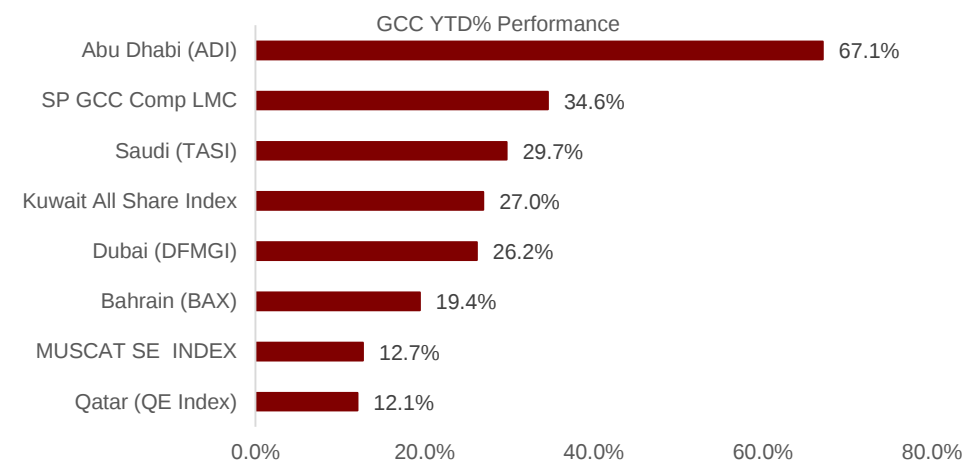
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.999	0.60	2.78	1.32	4.62	24.63	7.14 KWD	1.84	27.00
KFH	0.839	0.00	1.57	5.93	2.07	36.32	7.08 KWD	3.26	32.00
Zain	0.594	-0.17	-0.17	4.39	-0.83	-1.98	2.57 KWD	2.17	13.62
BOUBAYAN BANK	0.788	0.77	0.51	3.69	2.34	45.30	2.49 KWD	3.54	34.00
Agility	0.950	0.21	-0.52	2.93	-3.65	54.42	2.11 KWD	0.97	2.02
Saudi Arabia									
ARAMCO	35.70	0.85	1.28	3.03	-0.83	2.00	7,080.00 SAR	6.62	21.45
SABIC	115.60	1.40	-1.03	6.84	-9.26	14.00	342.00 SAR	1.97	35.00
STC	111.80	0.54	0.90	0.72	-11.97	5.47	222.40 SAR	3.24	19.90
AL-RAJHI BANK	141.20	0.86	-0.56	6.81	15.17	91.85	350.00 SAR	5.50	25.59
NCB	63.90	0.95	1.75	5.79	4.07	47.40	283.46 SAR	1.76	18.24
United Arab Emirates									
ETISALAT.AD	31.08	1.24	-15.77	-2.69	29.39	83.91	266.99 AED	5.80	28.93
FAB.AD	19.14	0.74	-1.34	-0.21	7.65	48.37	207.48 AED	1.90	17.07
EMIRATES NBD	13.55	3.44	-4.24	2.65	-4.58	31.55	82.75 AED	0.97	10.37
DB ISLAMIC BK	5.36	0.19	-3.77	3.88	8.28	16.27	38.74 AED	1.02	14.27
EMAAR PROPERT	4.76	-0.63	-4.80	1.49	16.67	34.84	39.18 AED	0.60	12.43
Qatar									
QNB	20.19	0.85	0.40	3.04	4.33	12.06	184.91 QAR	1.85	15.70
INDUSTRIES QAT	15.47	0.00	2.25	6.54	0.13	42.32	93.59 QAR	2.50	14.05
QA ISLAMIC BK	18.23	-0.27	-0.16	5.64	-0.44	6.20	43.19 QAR	1.81	13.63
MASRAF AL RAYA	4.87	-0.16	-1.60	0.23	8.53	7.31	45.37 QAR	2.47	16.43
MESAIEED PETRO	2.19	-0.95	-0.99	6.15	-2.17	7.87	27.78 QAR	1.66	16.94
OMAN									
BANK MUSCAT	0.496	-0.80	0.40	4.64	10.22	37.78	1.79 OMR	0.85	8.33
OMANTEL	0.736	-0.54	3.95	5.14	-0.54	1.66	0.56 OMR	0.99	7.69
BANK DHOFAR	0.126	0.80	0.80	-1.56	7.69	29.90	0.37 QAR	0.53	14.93
NAT BANK OF OMAN	0.192	0.52	3.78	0.00	3.78	20.00	0.31 QAR	0.56	12.71
OMINVEST	0.306	-1.29	2.00	-1.29	-2.55	-9.47	0.25 QAR	0.91	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
15-Dec-21	20.64%	12.12%	0.06%	2.80%	0.41%	4.53%	2.73%	10.34%	5.30%	4.35%
22-Dec-21	20.67%	12.17%	0.06%	0.28%	0.41%	4.48%	2.74%	10.37%	5.27%	4.56%

End of Report

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Leading Sector, Security Performance

Kuwait

The market is up today by + 0.13 %The leading sector best performance indices today are Basic Materials1.4 % Banking 0.23 respectively.

KSA

Saudi Armco has a positive performance today by 0.9%, SABIC has up performance today by 1.4%

STC has a positive performance today by 0.5%, Al Rajhi Bank has a positive performance today by 0.9%

UAE

ETISALAT AD closed up today by 1.2%, and act defensively with COVID19



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