

شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, December 15, 2021

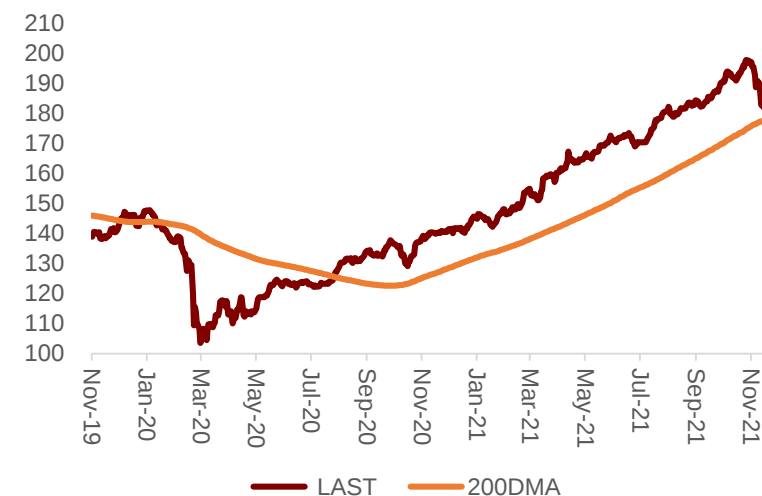




Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,143.38	1.08	1.51	3.18	-3.41	27.78	9,770 SAR	2.55	17.87
Qatar (QE Index)	11,642.07	-0.73	0.62	2.68	1.79	12.03	589 QAR	1.67	15.89
Dubai (DFMGI)	3,254.86	-0.65	0.89	5.92	14.39	30.61	329 AED	1.60	24.30
Abu Dhabi (ADI)	8,819.12	-0.26	-0.72	3.19	14.55	74.80	1,502 AED	1.88	16.76
Bahrain (BAX)	1,782.20	-0.19	-0.20	3.04	4.49	19.63	18 BHD	1.51	9.91
MUSCAT SE INDEX	4,020.59	-0.13	0.31	0.51	1.98	9.89	5 OMR	0.86	13.25
SP GCC Comp LMC	187.16	0.17	0.59	2.71	0.86	32.99			
Developed Markets									
MSCI World Index	3,138.06	-0.76	-1.57	1.17	4.37	16.65			
U.S. (S&P 500)	4,634.09	0.33	-1.65	1.47	7.58	23.38			
U.K. (FTSE 100)	7,197.15	-0.30	-1.30	1.95	1.56	11.40			
Japan (Topix)	1,984.10	0.52	0.44	2.89	-2.27	9.94			
Emerging Markets									
MSCI EM Index	1,222.10	-0.69	-1.33	0.80	-2.47	-5.36			
China (SSE Composite)	3,647.63	-0.38	-0.51	2.35	2.23	5.03			
India (Sensex)	57,788.03	-0.57	-1.79	1.18	-2.35	20.91			
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,988.88	-0.54	-0.73	2.95	1.83	26.04	41.72 KWD	2.09	25.76
Kuwait Premier Index	7,568.21	-0.64	-0.83	3.04	0.97	25.08	31.20 KWD	2.25	26.24
Kuwait Main Index	5,868.98	-0.24	-0.47	2.62	4.46	28.92	10.52 KWD	1.60	24.43
NIC 50	8,852.99	0.44	-0.88	2.96	0.90	25.08	28.60 KWD	2.23	25.24
Kuwait Sector									
Banking	1,598.15	-0.92	-0.93	2.59	1.39	26.59	24.01 KWD	1.24	27.24
Telecom	1,094.93	0.80	0.11	3.70	-0.06	-0.67	3.33 KWD	0.89	15.18
Industrials	1,144.48	-0.42	-0.65	2.31	-1.94	28.43	4.08 KWD	0.89	13.81
Financial services	1,417.99	-0.16	-0.13	5.06	7.51	52.52	3.65 KWD	0.88	11.62
Real estate	1,336.97	0.00	-0.55	3.41	4.50	40.35	2.88 KWD	0.75	54.56
Basic materials	1,039.34	0.69	0.02	5.45	-4.53	15.66	0.92 KWD	1.89	27.16
Health care	804.86	-0.09	-0.21	-0.51	1.13	-2.63	0.40 KWD	5.90	11.96
Consumer services	739.97	0.28	-0.14	0.98	-5.56	-0.86	0.69 KWD	0.88	15.74
Insurance	1,483.08	-1.42	-5.87	-6.74	2.28	28.28	0.63 KWD	0.78	8.41
Consumer Disc	1,343.62	0.37	-0.19	10.47	20.27	64.14	0.23 KWD	1.35	9.02
Energy	1,448.53	-2.25	-1.91	4.41	5.21	13.40	0.31 KWD	1.03	15.53
Technology	749.33	0.00	3.00	0.98	4.89	49.06	0.01 KWD	0.89	0.00
Utilities	605.26	0.00	-0.86	-0.86	-2.95	-16.97	0.25 KWD	4.08	19.54

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices fell on Wednesday for a third day on growing expectations that supply growth will outpace demand growth next year, even though the omicron coronavirus variant is not seen curbing mobility as sharply as earlier Covid-19 variants, Brent crude futures fell 43 cents, or 0.6%, to \$73.27 a barrel, after losing 69 cents on Tuesday.

Kuwait Market

The market closed today down by -0.54%, value traded 66.3 million KD, Premier market value traded reached 47.6 million KD and closed at 7,568.21 down by -0.64%.

Saudi Market

The Market closed up by + 1.08 %, with positive macroeconomic sentiments bounce of oil reaching \$73.27.



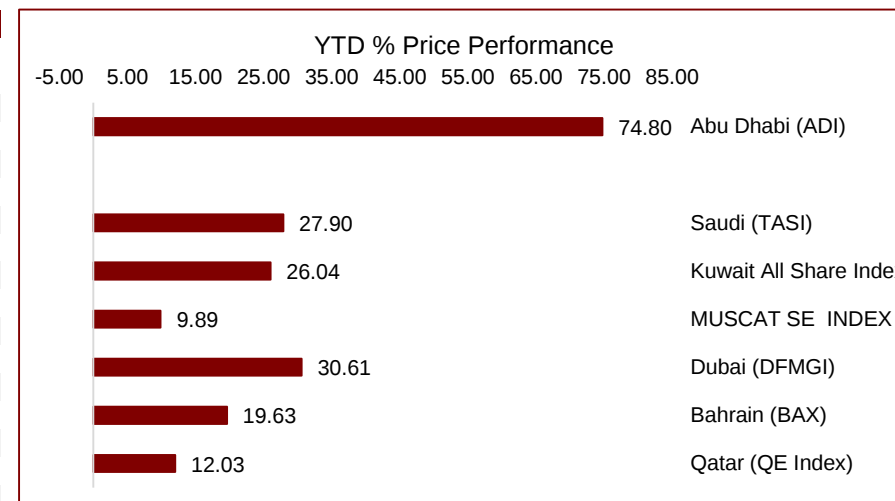
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.975	-1.42	-1.52	-0.91	2.31	21.88	7.11 KWD	1.83	27.00
KFH	0.827	-1.55	-0.96	4.42	0.61	34.37	7.09 KWD	3.26	32.00
Zain	0.598	1.01	-0.33	4.92	-0.33	-1.49	2.56 KWD	2.16	13.56
BOUBYAN BANK	0.789	-0.13	-0.25	4.22	2.86	46.04	2.51 KWD	3.58	34.00
Agility	0.945	-0.32	0.11	2.71	-3.86	54.10	2.11 KWD	0.97	2.02
Saudi Arabia									
ARAMCO	35.15	0.43	1.15	1.44	-2.36	0.43	7,000.19 SAR	6.55	21.08
SABIC	114.40	1.96	4.98	5.18	-10.67	12.23	336.61 SAR	1.93	35.00
STC	109.60	0.55	-0.55	-1.44	-13.86	3.21	218.01 SAR	3.18	19.40
AL-RAJHI BANK	139.00	1.61	2.52	4.54	12.72	87.77	342.01 SAR	5.37	24.58
NCB	61.90	1.98	-0.64	2.32	0.65	42.56	271.82 SAR	1.69	17.87
United Arab Emirates									
ETISALAT.AD	36.20	-0.28	3.49	13.34	50.71	114.20	315.69 AED	6.85	34.20
FAB.AD	19.64	-0.30	-2.87	2.40	10.46	52.25	215.12 AED	1.97	17.70
EMIRATES NBD	14.00	-1.06	0.72	6.06	-1.41	35.92	89.38 AED	1.05	11.20
DB ISLAMIC BK	5.53	-1.07	2.41	7.17	11.72	19.96	40.48 AED	1.06	14.91
EMAAR PROPERT	5.01	-0.20	2.45	6.82	22.79	41.93	41.06 AED	0.63	13.03
Qatar									
QNB	19.78	-1.10	-0.55	2.68	3.97	11.67	183.26 QAR	1.84	15.69
INDUSTRIES QAT	15.00	-2.28	1.33	5.03	-1.29	40.29	92.13 QAR	2.48	13.94
QA ISLAMIC BK	18.12	-0.71	1.28	5.87	-0.22	6.43	42.78 QAR	1.80	13.61
MASRAF AL RAYA	4.85	-0.51	0.10	0.10	8.39	7.17	44.93 QAR	2.46	16.40
MESAIEED PETRO	2.23	-0.49	3.51	7.69	-0.75	9.43	27.89 QAR	1.68	17.15
OMAN									
BANK MUSCAT	0.490	-1.61	-0.81	3.38	8.89	36.11	1.78 OMR	0.85	8.33
OMANTEL	0.704	0.00	-0.56	0.57	-4.86	-2.76	0.53 OMR	0.94	7.69
BANK DHOFAR	0.125	0.00	0.81	-2.34	6.84	28.87	0.37 QAR	0.53	14.93
NAT BANK OF OMAN	0.188	-1.05	1.62	-2.08	1.62	17.50	0.31 QAR	0.56	12.71
OMINVEST	0.304	-0.65	-0.65	-1.94	-3.18	-10.06	0.25 QAR	0.89	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
8-Dec-21	20.92%	11.76%	0.06%	0.30%	0.41%	4.62%	2.75%	10.54%	5.30%	4.38%
15-Dec-21	20.64%	12.12%	0.06%	2.80%	0.41%	4.53%	2.73%	10.34%	5.30%	4.35%

End of Report

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Leading Sector Performance

The market is down today by -0.54 %The leading sector bottom performance indices today are 0 0 % China (SSE Composite) -0.38 % SP GCC Comp LMC 0.168 % respectively

Telecommunication sector are up today by + 0.8 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-26.71 %

KSA

Saudi Armco has a positive performance today by + 0.43 %, SABIC have positive performance today by + 1.96 %

STC has a positive performance today by + 0.55 %, Al Rajhi Bank has a positive performance today by + 1.61 %

UAE

ETISALAT AD closed down today by - 0.28%, and act defensively with COVID19



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