



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

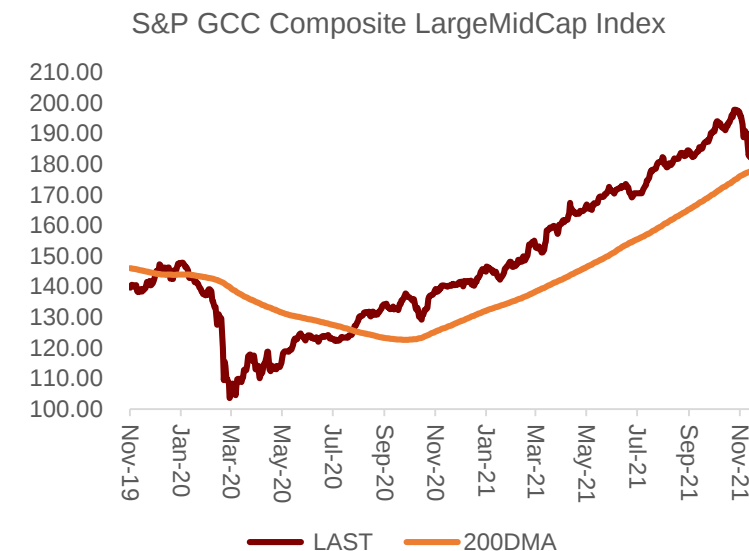
Thursday, December 19, 2021





Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,160.24	-1.34	-1.34	3.70	-2.92	28.43	9,899 SAR	2.57	17.82
Qatar (QE Index)	11,687.41	0.39	0.59	2.64	1.76	11.99	592 QAR	1.67	15.79
Dubai (DFMGI)	3,156.72	-3.56	-3.56	2.73	10.94	26.68	329 AED	1.56	24.10
Abu Dhabi (ADI)	8,650.71	-2.32	-2.32	1.22	12.36	71.46	1,507 AED	1.87	16.01
Bahrain (BAX)	1,782.20	-0.19	-0.20	3.04	4.49	19.63	18 BHD	1.51	9.91
MUSCAT SE INDEX	4,043.11	0.31	0.31	1.07	2.55	10.50	5 OMR	0.86	13.25
SP GCC Comp LMC	190.26	0.01	0.90	3.02	1.17	33.40			
Developed Markets									
MSCI World Index	3,139.75	-0.87	-1.52	1.22	4.43	16.72			
U.S. (S&P 500)	4,620.64	0.33	-1.94	1.17	7.27	23.02			
U.K. (FTSE 100)	7,269.92	0.13	-0.30	2.98	2.59	12.53			
Japan (Topix)	1,984.47	-1.42	0.46	2.91	-2.25	9.96			
Emerging Markets									
MSCI EM Index	1,216.30	-0.62	-1.80	0.32	-2.94	-5.81			
China (SSE Composite)	3,632.36	-1.16	-0.93	1.92	1.80	4.59			
India (Sensex)	57,011.74	-1.54	-3.02	-0.09	-3.58	19.39			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,933.95	-0.60	-0.60	2.12	1.01	25.03	41.42 KWD	2.07	25.55
Kuwait Premier Index	7,501.32	-0.63	-0.63	2.12	0.06	23.97	30.91 KWD	2.22	25.92
Kuwait Main Index	5,840.14	-0.52	-0.52	2.12	3.94	28.29	10.50 KWD	1.62	24.55
NIC 50	8,385.51	-0.61	-0.61	2.32	0.57	25.49	28.60 KWD	2.20	24.92
Kuwait Sector									
Banking	1,583.48	-0.57	-0.57	1.65	0.46	25.43	23.70 KWD	1.24	26.92
Telecom	1,086.45	-0.28	-0.28	2.89	-0.84	-1.44	3.34 KWD	0.89	14.95
Industrials	1,139.37	-1.13	-1.13	1.85	-2.38	27.86	4.09 KWD	0.89	13.77
Financial services	1,402.46	-0.94	-0.94	3.91	6.33	50.85	3.64 KWD	0.87	11.58
Real estate	1,326.91	-0.95	-0.95	2.64	3.71	39.29	2.89 KWD	0.75	52.69
Basic materials	1,030.99	0.25	0.25	4.60	-5.30	14.73	0.92 KWD	1.94	27.04
Health care	801.56	-0.56	-0.56	-0.92	0.71	-3.03	0.40 KWD	6.11	11.96
Consumer services	737.55	0.09	0.09	0.65	-5.86	-1.18	0.70 KWD	0.89	15.88
Insurance	1,501.15	1.70	1.70	-5.60	3.52	29.84	0.62 KWD	0.75	8.41
Consumer Disc	1,363.10	0.42	0.42	12.07	22.01	66.52	0.23 KWD	1.35	9.00
Energy	1,435.67	-2.34	-2.34	3.49	4.27	12.40	0.31 KWD	1.03	15.41
Technology	749.33	0.00	0.00	0.98	4.89	49.06	0.01 KWD	0.89	0.00
Utilities	600.00	-0.44	-0.44	-1.72	-3.80	-17.69	0.25 KWD	4.06	19.46



What Move the GCC markets

Oil Prices

Oil prices dipped on Friday, putting the market on track for a weekly loss, as surging cases of the Omicron coronavirus variant raised fears new curbs may hit fuel demand. Brent crude futures settled 2% lower at \$73.52 per barrel, while U.S. West Texas Intermediate (WTI) crude futures dropped 2.1% to settle at \$70.86 a barrel. Brent and WTI are both headed for a 1.4% loss this week.

Kuwait Market

The market closed today down by -0.60%, value traded 39.5 million KD, Premier market value traded reached 22.3 million KD and closed at 7,501 down by -0.63%.

Saudi Market

The Market closed down by -1.34%, with positive macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



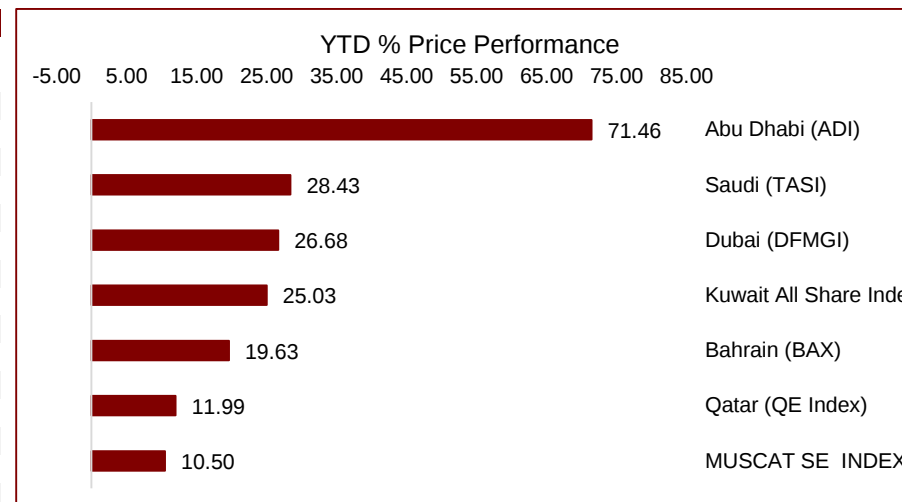
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.959	-1.13	-1.13	-2.54	0.63	19.88	6.97 KWD	1.80	27.00
KFH	0.824	-0.24	-0.24	4.04	0.24	33.88	6.97 KWD	3.21	32.00
Zain	0.592	-0.50	-0.50	4.04	-1.17	-2.31	2.57 KWD	2.17	13.62
BOUBYAN BANK	0.777	-0.64	-0.64	2.51	1.17	43.64	2.49 KWD	3.54	34.00
Agility	0.944	-1.05	-1.05	2.39	-4.16	53.61	2.13 KWD	0.97	2.03
Saudi Arabia									
ARAMCO	35.05	-0.57	-0.57	1.15	-2.64	0.14	7,052.07 SAR	6.59	21.26
SABIC	113.80	-2.57	-2.57	5.18	-10.67	12.23	350.50 SAR	2.01	35.00
STC	110.20	-0.54	-0.54	-0.72	-13.23	3.96	221.66 SAR	3.23	19.40
AL-RAJHI BANK	139.80	-1.55	-1.55	5.75	14.03	89.95	355.10 SAR	5.58	25.08
NCB	61.90	-1.43	-1.43	2.48	0.81	42.79	281.30 SAR	1.74	17.95
United Arab Emirates									
ETISALAT.AD	35.58	-3.58	-3.58	11.40	48.13	110.53	320.91 AED	6.97	34.77
FAB.AD	18.80	-3.09	-3.09	-1.98	5.74	45.74	211.85 AED	1.94	17.43
EMIRATES NBD	13.55	-4.24	-4.24	2.65	-4.58	31.55	89.38 AED	1.05	11.20
DB ISLAMIC BK	5.39	-3.23	-3.23	4.46	8.89	16.92	40.33 AED	1.06	14.85
EMAAR PROPERT	4.80	-4.00	-4.00	2.35	17.65	35.98	40.90 AED	0.63	12.98
Qatar									
QNB	19.90	0.61	-0.60	2.63	3.92	11.61	183.80 QAR	1.83	15.51
INDUSTRIES QAT	15.13	0.87	0.53	4.20	-2.07	39.19	91.54 QAR	2.45	13.62
QA ISLAMIC BK	18.20	0.44	1.22	5.81	-0.27	6.37	43.01 QAR	1.80	13.51
MASRAF AL RAYA	4.94	1.96	1.86	1.86	10.29	9.05	45.94 QAR	2.50	16.32
MESAIEED PETRO	2.23	0.13	3.05	7.21	-1.20	8.94	28.02 QAR	1.68	17.07
OMAN									
BANK MUSCAT	0.494	1.23	0.00	4.22	9.78	37.22	1.74 OMR	0.83	8.33
OMANTEL	0.716	0.56	0.57	1.71	-3.78	-1.66	0.53 OMR	0.95	7.69
BANK DHOFAR	0.125	0.00	0.00	-2.34	6.84	28.87	0.37 QAR	0.53	14.93
NAT BANK OF OMAN	0.185	0.00	0.00	-3.65	0.00	15.63	0.30 QAR	0.54	12.71
OMINVEST	0.302	0.00	0.67	-2.58	-3.82	-10.65	0.24 QAR	0.88	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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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is down today by -0.60 %, The leading sector bottom performance indices today are Energy 2.3% ,

Telecommunication sector are down today by -0.28 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -26.4

KSA

Saudi Armco has a negative performance today by -0.57 %, SABIC have negative performance today by + 35.05 %

STC has a negative performance today by -0.54%, Al Rajhi Bank has a negative performance today by -1.55 %

UAE

ETISALAT AD closed down today by -3.58%, and act defensively with COVID19



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