

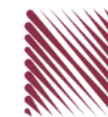


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, December 20, 2021



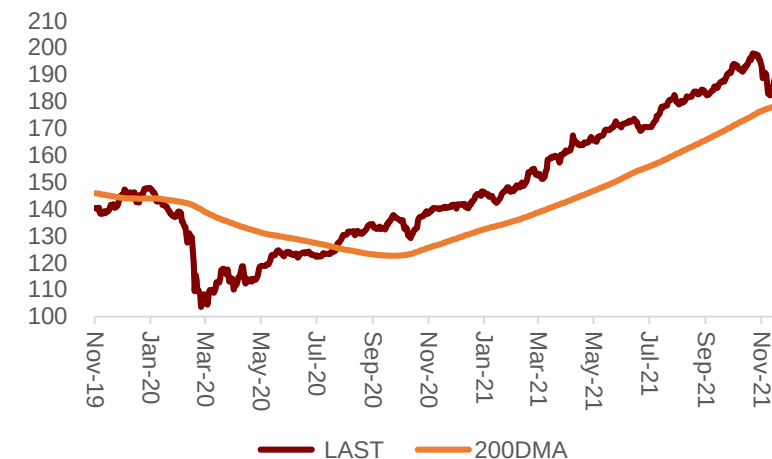


Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,170.48	0.09	-1.25	3.80	-2.83	28.55	9,864 SAR	2.54	17.79
Qatar (QE Index)	11,658.53	-0.25	-0.25	2.39	1.51	11.72	594 QAR	1.66	15.83
Dubai (DFMGI)	3,156.91	0.01	-3.55	2.73	10.94	26.68	318 AED	1.54	23.08
Abu Dhabi (ADI)	8,557.38	-1.08	-3.37	0.13	11.15	69.61	1,452 AED	1.84	15.55
Bahrain (BAX)	1,770.98	-0.63	-0.63	2.39	3.84	18.88	18 BHD	1.50	9.86
MUSCAT SE INDEX	4,050.01	0.17	0.48	1.24	2.73	10.69	5 OMR	0.86	13.25
SP GCC Comp LMC	187.73	-1.33	-1.25	3.11	1.26	33.51			
Developed Markets									
MSCI World Index	3,139.75	-0.87	-1.25	-0.04	3.12	15.26			
U.S. (S&P 500)	4,620.64	0.33	-1.14	0.02	6.05	21.62			
U.K. (FTSE 100)	7,183.89	-1.18	-0.99	1.96	1.58	11.42			
Japan (Topix)	1,941.33	-2.17	-0.77	2.11	-3.01	9.11			
Emerging Markets									
MSCI EM Index	1,216.30	-0.62	-2.16	-1.84	-5.03	-7.84			
China (SSE Composite)	3,593.60	-1.07	-0.35	1.56	1.44	4.22			
India (Sensex)	55,822.01	-2.09	-0.46	-0.55	-4.02	18.84			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,940.92	0.10	-0.50	2.22	1.11	25.15	41.20 KWD	2.07	25.45
Kuwait Premier Index	7,525.40	0.32	-0.31	2.45	0.39	24.36	30.83 KWD	2.22	25.87
Kuwait Main Index	5,807.40	-0.56	-1.08	1.55	3.36	27.57	10.37 KWD	1.61	24.31
NIC 50	8,400.42	-0.61	-0.61	2.32	0.57	25.61	28.60 KWD	2.20	24.87
Kuwait Sector									
Banking	1,589.10	0.35	-0.21	2.01	0.82	25.87	23.65 KWD	1.24	26.87
Telecom	1,087.36	0.08	-0.20	2.98	-0.75	-1.36	3.33 KWD	0.93	14.74
Industrials	1,139.38	0.00	-1.13	1.85	-2.37	27.86	4.04 KWD	0.88	13.57
Financial services	1,396.53	-0.42	-1.36	3.47	5.88	50.21	3.57 KWD	0.84	11.42
Real estate	1,320.04	-0.52	-1.46	2.10	3.17	38.57	2.85 KWD	0.72	52.02
Basic materials	1,026.79	-0.41	-0.16	4.17	-5.68	14.27	0.92 KWD	1.94	26.96
Health care	801.56	0.00	-0.56	-0.92	0.71	-3.03	0.40 KWD	6.11	11.61
Consumer services	736.52	-0.14	-0.05	0.50	-6.00	-1.32	0.69 KWD	0.88	15.72
Insurance	1,499.69	-0.10	1.60	-5.69	3.42	29.71	0.62 KWD	0.75	8.41
Consumer Disc	1,344.74	-1.35	-0.93	10.56	20.37	64.27	0.23 KWD	1.34	9.02
Energy	1,432.07	-0.25	-2.59	3.23	4.01	12.11	0.30 KWD	1.03	15.04
Technology	749.33	0.00	0.00	0.98	4.89	49.06	0.01 KWD	0.89	0.00
Utilities	602.63	0.00	0.00	-1.29	-3.38	-17.33	0.25 KWD	4.06	19.46

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

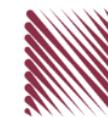
Oil investors remained worried about the rapid spread of the omicron coronavirus variant globally, prompting countries to consider more restrictions potentially denting fuel demand. Brent crude futures increased by 9 cents, or 0.1%, to \$71.61 a barrel by 0105 GMT, while U.S. West Texas Intermediate (WTI) crude futures rose by 23 cents, or 0.3%, to \$68.84 a barrel.

Kuwait Market

The market closed today up by +0.10%, value traded 44.9 million KD, Premier market value traded reached 32.0 million KD and closed at 7,525.4 up by +0.32%.

Saudi Market

The Market closed up by 0.09%, with positive macroeconomic sentiments and volatility of oil prices linked by Omicron variant.



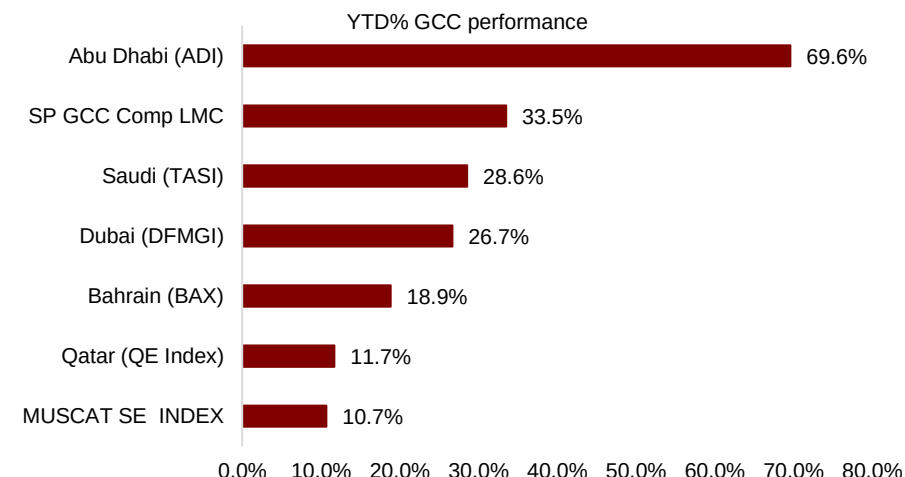
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.965	0.63	-0.52	-1.93	1.26	20.63	6.94 KWD	1.79	27.00
KFH	0.834	1.21	0.97	5.30	1.46	35.51	7.04 KWD	3.24	32.00
Zain	0.596	0.68	0.17	4.75	-0.50	-1.65	2.58 KWD	2.17	13.65
BOUBAYAN BANK	0.773	-0.51	-1.15	1.98	0.65	42.90	2.46 KWD	3.50	34.00
Agility	0.943	-0.11	-1.15	2.28	-4.26	53.45	2.10 KWD	0.96	2.01
Saudi Arabia									
ARAMCO	35.25	0.57	0.00	1.73	-2.08	0.71	7,051.69 SAR	6.59	21.20
SABIC	114.80	0.88	-1.71	6.10	-9.89	13.22	344.48 SAR	1.98	35.00
STC	112.00	1.63	1.08	0.90	-11.81	5.66	224.05 SAR	3.27	19.51
AL-RAJHI BANK	139.60	-0.14	-1.69	5.60	13.87	89.67	349.08 SAR	5.48	25.23
NCB	62.30	0.65	-0.80	3.15	1.47	43.71	279.05 SAR	1.73	17.95
United Arab Emirates									
ETISALAT.AD	33.70	-5.28	-8.67	5.51	40.30	99.41	293.08 AED	6.36	31.75
FAB.AD	19.00	1.06	-2.06	-0.94	6.86	47.29	207.48 AED	1.90	17.07
EMIRATES NBD	13.90	2.58	-1.77	5.30	-2.11	34.95	87.80 AED	1.03	11.00
DB ISLAMIC BK	5.40	0.19	-3.05	4.65	9.09	17.14	39.10 AED	1.02	14.40
EMAAR PROPERT	4.76	-0.83	-4.80	1.49	16.67	34.84	38.94 AED	0.60	12.35
Qatar									
QNB	19.93	0.15	0.15	2.78	4.07	11.78	185.27 QAR	1.84	15.63
INDUSTRIES QAT	15.24	0.73	0.73	4.96	-1.36	40.20	92.80 QAR	2.46	13.84
QA ISLAMIC BK	18.24	0.22	0.22	6.05	-0.05	6.60	43.38 QAR	1.80	13.60
MASRAF AL RAYA	4.90	-0.89	-0.89	0.95	9.31	8.08	45.83 QAR	2.48	16.49
MESAIEED PETRO	2.20	-1.17	-1.17	5.96	-2.35	7.67	27.87 QAR	1.66	16.89
OMAN									
BANK MUSCAT	0.490	-0.81	-0.40	3.80	9.33	36.67	1.76 OMR	0.84	8.33
OMANTEL	0.716	0.56	1.13	2.29	-3.24	-1.10	0.54 OMR	0.95	7.69
BANK DHOFAR	0.125	0.00	0.00	-2.34	6.84	28.87	0.38 QAR	0.53	14.93
NAT BANK OF OMAN	0.189	2.16	1.08	-2.60	1.08	16.88	0.30 QAR	0.55	12.71
OMINVEST	0.300	-0.66	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, Bursa Kuwait , Refinitiv , NIC



Leading Sector Performance

The market is up today by + 0.1 %The leading sector best performance indices today are Banking 0.35 % Telecom 0.08 % Utilities 0 % respectively

KSA

Saudi Armco has a positive performance today by +0.57 %, SABIC have up performance today by + 0.88 %

STC has a positive performance today by 1.63%, Al Rajhi Bank has a negative performance today by -0.14%

UAE

ETISALAT AD closed down today by -5.28%, and act defensively with COVID19



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