



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, December 21, 2021

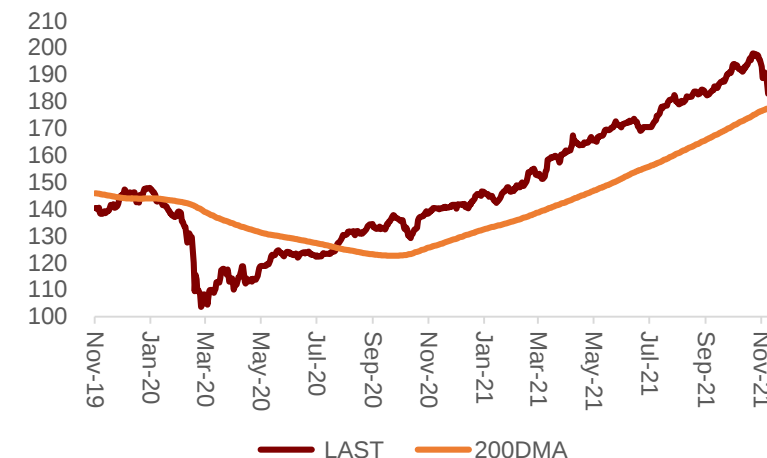




Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,261.28	0.81	-0.45	4.64	-2.04	29.60	9,930 SAR	2.55	17.63
Qatar (QE Index)	11,653.27	-0.05	-0.29	2.34	1.46	11.66	587 QAR	1.65	15.82
Dubai (DFMGI)	3,152.93	-0.13	-3.67	2.60	10.80	26.52	316 AED	1.52	23.09
Abu Dhabi (ADI)	8,458.62	-1.15	-4.49	-1.03	9.87	67.65	1,442 AED	1.83	15.26
Bahrain (BAX)	1,769.51	-0.08	-0.71	2.31	3.75	18.78	18 BHD	1.50	9.87
MUSCAT SE INDEX	4,075.11	0.62	1.11	1.87	3.36	11.38	5 OMR	0.86	13.25
SP GCC Comp LMC	188.694	0.43	-0.83	3.55	1.69	34.08			
Developed Markets									
MSCI World Index	3,100.50	-1.25	0.40	1.63	4.85	17.18			
U.S. (S&P 500)	4,568.02	0.33	0.62	1.80	7.93	23.78			
U.K. (FTSE 100)	7,264.63	0.93	0.38	3.37	2.98	12.95			
Japan (Topix)	1,969.79	1.47	-0.79	2.09	-3.03	9.09			
Emerging Markets									
MSCI EM Index	1,190.08	-2.16	-1.04	-0.72	-3.95	-6.78			
China (SSE Composite)	3,625.13	0.88	-0.30	1.62	1.50	4.27			
India (Sensex)	56,319.01	0.89	-0.81	-0.90	-4.36	18.43			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,981.63	0.59	0.08	2.82	1.70	25.89	41.36 KWD	2.07	25.53
Kuwait Premier Index	7,589.60	0.85	0.54	3.32	1.24	25.43	31.02 KWD	2.23	26.02
Kuwait Main Index	5,794.61	-0.22	-1.30	1.32	3.13	27.29	10.34 KWD	1.59	24.13
NIC 50	8,459.05	0.70	-0.61	2.32	0.57	26.59	28.60 KWD	2.21	25.02
Kuwait Sector									
Banking	1,604.57	0.97	0.76	3.00	1.80	27.10	23.81 KWD	1.24	27.02
Telecom	1,088.61	0.11	-0.08	3.10	-0.64	-1.24	3.34 KWD	0.92	14.74
Industrials	1,144.85	0.48	-0.65	2.34	-1.91	28.48	4.06 KWD	0.87	13.60
Financial services	1,395.99	-0.04	-1.40	3.43	5.84	50.15	3.57 KWD	0.85	11.68
Real estate	1,326.30	0.47	-0.99	2.59	3.66	39.23	2.86 KWD	0.75	51.44
Basic materials	1,031.29	0.44	0.28	4.63	-5.27	14.77	0.92 KWD	1.94	27.08
Health care	797.03	-0.57	-1.13	-1.48	0.14	-3.58	0.39 KWD	6.11	11.27
Consumer services	738.57	0.28	0.23	0.78	-5.73	-1.04	0.68 KWD	0.88	15.44
Insurance	1,464.66	-2.34	-0.77	-7.90	1.01	26.68	0.61 KWD	0.75	8.40
Consumer Disc	1,322.84	-1.63	-2.55	8.76	18.41	61.60	0.23 KWD	1.35	9.05
Energy	1,434.37	0.16	-2.43	3.39	4.18	12.29	0.30 KWD	1.02	15.10
Technology	749.33	0.00	0.00	0.98	4.89	49.06	0.01 KWD	0.89	0.00
Utilities	600.00	0.00	-0.44	-1.72	-3.80	-17.69	0.25 KWD	4.04	19.37

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices rebounded on Tuesday after a sharp fall in the previous session as investors' appetite for risk improved, although they remained cautious amid the rapid spread of the Omicron coronavirus variant across the globe. Brent crude settled \$2.46, or 3.4%, higher at \$73.98 per barrel, and U.S. West Texas Intermediate (WTI) crude rose \$2.51, or 3.66%, to settle at \$71.12 per barrel.

Kuwait Market

The market closed today up by +0.59%, value traded 48.1 million KD, Premier market value traded reached 32.4 million KD and closed at 7,589.6 up by +0.85%.

Saudi Market

The Market closed up by 0.81%, with positive macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



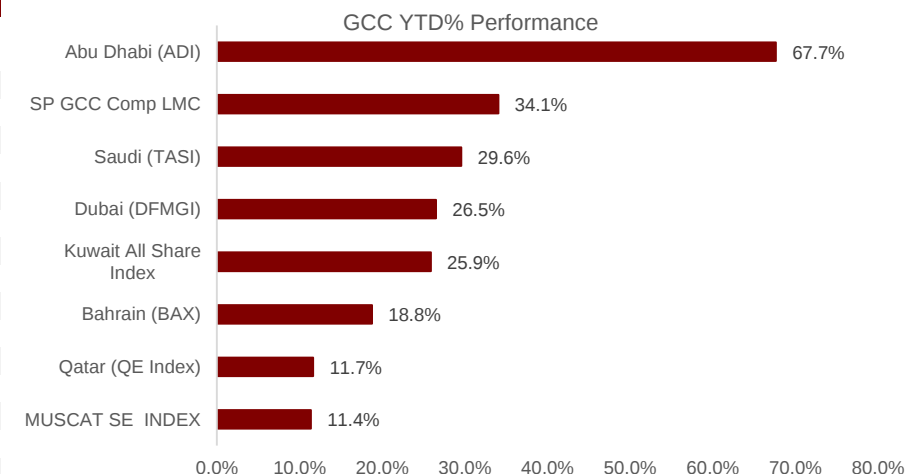
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.980	1.55	1.03	-0.41	2.83	22.50	7.04 KWD	1.82	27.00
KFH	0.838	0.48	1.45	5.81	1.95	36.16	7.07 KWD	3.25	32.00
Zain	0.597	0.17	0.34	4.92	-0.33	-1.49	2.58 KWD	2.17	13.67
BOUBYAN BANK	0.774	0.13	-1.02	2.11	0.78	43.08	2.46 KWD	3.51	34.00
Agility	0.952	0.95	-0.21	3.25	-3.35	54.91	2.12 KWD	0.97	2.03
Saudi Arabia									
ARAMCO	35.45	0.57	0.57	2.31	-1.53	1.29	7,090.94 SAR	6.63	21.32
SABIC	116.00	1.05	-0.68	7.21	-8.95	14.40	348.05 SAR	2.00	35.00
STC	112.40	0.36	1.44	1.26	-11.50	6.04	224.83 SAR	3.28	19.83
AL-RAJHI BANK	141.80	1.58	-0.14	7.26	15.66	92.66	354.55 SAR	5.57	25.19
NCB	62.90	0.96	0.16	4.14	2.44	45.10	281.70 SAR	1.75	18.07
United Arab Emirates									
ETISALAT.AD	32.00	-5.05	-13.28	0.19	33.22	89.35	278.30 AED	6.04	30.15
FAB.AD	18.90	-0.53	-2.58	-1.46	6.30	46.51	206.39 AED	1.89	16.98
EMIRATES NBD	13.45	-3.24	-4.95	1.89	-5.28	30.58	84.96 AED	1.00	10.65
DB ISLAMIC BK	5.42	0.37	-2.69	5.04	9.49	17.57	39.24 AED	1.03	14.45
EMAAR PROPERT	4.80	0.84	-4.00	2.35	17.65	35.98	39.26 AED	0.60	12.46
Qatar									
QNB	19.90	-0.15	0.00	2.63	3.92	11.61	182.70 QAR	1.83	15.61
INDUSTRIES QAT	15.40	1.05	1.78	6.06	-0.32	41.67	92.61 QAR	2.49	13.98
QA ISLAMIC BK	18.18	-0.33	-0.11	5.70	-0.38	6.25	42.70 QAR	1.80	13.56
MASRAF AL RAYA	4.87	-0.53	-1.42	0.41	8.73	7.51	45.02 QAR	2.46	16.40
MESAIEED PETRO	2.19	-0.64	-1.79	5.29	-2.97	6.99	27.35 QAR	1.65	16.78
OMAN									
BANK MUSCAT	0.498	1.22	0.81	5.06	10.67	38.33	1.78 OMR	0.85	8.33
OMANTEL	0.728	1.68	2.26	3.43	-2.16	0.00	0.54 OMR	0.96	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	0.187	0.00	1.08	-2.60	1.08	16.88	0.30 QAR	0.55	12.71
OMINVEST	0.300	-0.66	0.00	-3.23	-4.46	-11.24	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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Leading Sector, Security Performance

Kuwait

The market is up today by + 0.59 %The leading sector best performance indices today are Banking 0.97 % industrial 0.48 % respectively.

KSA

Saudi Armco has a positive performance today by +0.57 %, SABIC have up performance today by + 1.05 %

STC has a positive performance today by +0.36%, Al Rajhi Bank has a positive performance today by +1.58%

UAE

ETISALAT AD closed down today by -5.05%, and act defensively with COVID19



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