



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, December 22, 2021



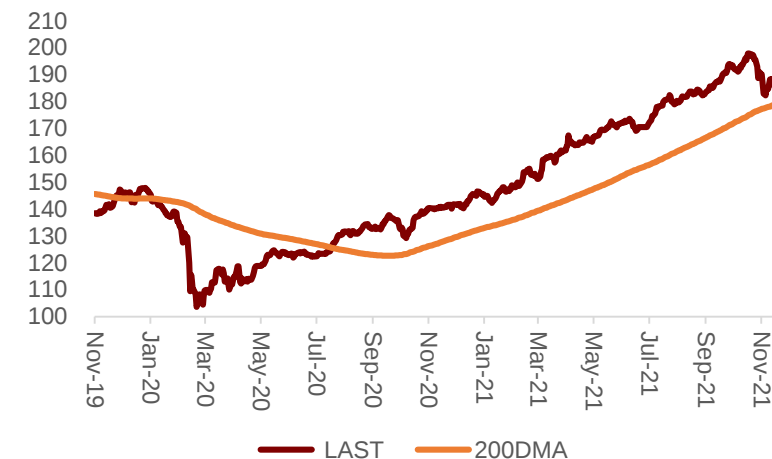


Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,204.43	-0.50	-0.95	4.11	-2.53	28.94	9,902 SAR	2.52	17.76
Qatar (QE Index)	11,683.73	0.26	-0.03	2.61	1.73	11.96	592 QAR	1.66	15.89
Dubai (DFMGI)	3,126.29	-0.84	-4.49	1.74	9.87	25.45	313 AED	1.52	23.04
Abu Dhabi (ADI)	8,398.89	-0.71	-5.16	-1.73	9.09	66.47	1,430 AED	1.84	15.27
Bahrain (BAX)	1,777.53	0.45	-0.26	2.77	4.22	19.31	18 BHD	1.50	9.80
MUSCAT SE INDEX	4,109.99	0.86	1.97	2.74	4.25	12.33	5 OMR	0.87	13.25
SP GCC Comp LMC	188.07	0.43	-1.15	3.21	1.36	33.64			
Developed Markets									
MSCI World Index	3,183.62	1.67	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)	7,341.66	0.05	0.99	4.00	3.60	13.64			
Japan (Topix)	1,984.55	0.09	0.00	2.91	-2.25	9.97			
Emerging Markets									
MSCI EM Index	1,209.88	1.14	-0.53	-0.21	-3.45	-6.30			
China (SSE Composite)	3,625.62	-0.07	-0.19	1.73	1.61	4.39			
India (Sensex)	57,264.12	1.09	0.43	0.34	-3.16	19.91			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,031.57	0.72	0.80	3.56	2.43	26.79	41.69 KWD	2.09	25.74
Kuwait Premier Index	7,632.48	0.56	1.11	3.91	1.81	26.13	31.22 KWD	2.24	26.24
Kuwait Main Index	5,862.69	1.17	-0.14	2.51	4.34	28.78	10.47 KWD	1.61	24.34
NIC 50	8,515.62	0.67	-0.61	2.32	0.57	27.43	28.60 KWD	2.22	25.24
Kuwait Sector									
Banking	1,619.40	0.92	1.69	3.95	2.74	28.27	24.05 KWD	1.26	27.24
Telecom	1,087.26	-0.12	-0.20	2.97	-0.76	-1.37	3.33 KWD	0.91	14.83
Industrials	1,148.69	0.34	-0.32	2.69	-1.58	28.91	4.08 KWD	0.88	13.70
Financial services	1,410.72	1.06	-0.36	4.52	6.96	51.74	3.62 KWD	0.86	12.06
Real estate	1,329.91	0.27	-0.72	2.87	3.95	39.60	2.87 KWD	0.74	50.79
Basic materials	1,037.17	0.57	0.85	5.23	-4.73	15.42	0.92 KWD	1.94	27.26
Health care	807.01	1.25	0.11	-0.24	1.40	-2.37	0.40 KWD	6.11	12.03
Consumer services	738.94	0.05	0.28	0.84	-5.69	-0.99	0.69 KWD	0.89	15.48
Insurance	1,463.30	-0.09	-0.87	-7.98	0.91	26.56	0.61 KWD	0.75	8.41
Consumer Disc	1,340.03	1.30	-1.28	10.18	19.95	63.70	0.23 KWD	1.35	9.03
Energy	1,428.75	-0.39	-2.81	2.99	3.77	11.85	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 rose on Wednesday on fears of tight supply and a drawdown in U.S. inventories, despite worries about the likely hit to economic activity from the spread of the Omicron coronavirus variant. U.S. inventories fell more than expected, with crude stocks down by 4.7 million barrels, though that is in part due to year-end tax considerations that encourage companies not to store crude barrels. Brent crude futures settled \$1.31, or 1.77%, higher at \$75.29 a barrel after gaining 3.4% in the last session.

Kuwait Market

The market closed today up by +0.72%, value traded 57.6 million KD, Premier market value traded reached 36.5 million KD and closed at 7,632.5 up by +0.56%.

Saudi Market

The Market closed down by -0.50%, with the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



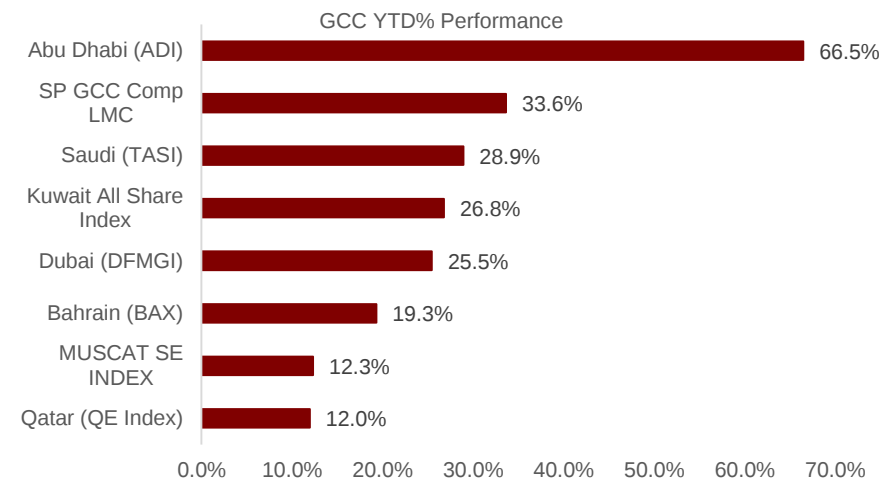
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.993	1.33	2.37	0.91	4.20	24.13	7.14 KWD	1.84	27.00
KFH	0.839	0.12	1.57	5.93	2.07	36.32	7.08 KWD	3.26	32.00
Zain	0.595	-0.34	0.00	4.57	-0.67	-1.82	2.57 KWD	2.17	13.62
BOUBAYAN BANK	0.782	1.03	0.00	3.17	1.82	44.56	2.49 KWD	3.54	34.00
Agility	0.948	-0.42	-0.63	2.82	-3.76	54.26	2.11 KWD	0.97	2.02
Saudi Arabia									
ARAMCO	35.40	-0.14	0.43	2.16	-1.67	1.14	7,080.00 SAR	6.62	21.45
SABIC	114.00	-1.72	-2.40	5.36	-10.52	12.43	342.00 SAR	1.97	35.00
STC	111.20	-1.07	0.36	0.18	-12.44	4.91	222.40 SAR	3.24	19.90
AL-RAJHI BANK	140.00	-1.27	-1.41	5.90	14.19	90.22	350.00 SAR	5.50	25.59
NCB	63.30	0.64	0.80	4.80	3.09	46.02	283.46 SAR	1.76	18.24
United Arab Emirates									
ETISALAT.AD	30.70	-4.06	-16.80	-3.88	27.81	81.66	266.99 AED	5.80	28.93
FAB.AD	19.00	0.53	-2.06	-0.94	6.86	47.29	207.48 AED	1.90	17.07
EMIRATES NBD	13.10	-2.60	-7.42	-0.76	-7.75	27.18	82.75 AED	0.97	10.37
DB ISLAMIC BK	5.35	-1.29	-3.95	3.68	8.08	16.05	38.74 AED	1.02	14.27
EMAAR PROPERT	4.79	-0.21	-4.20	2.13	17.40	35.69	39.18 AED	0.60	12.43
Qatar									
QNB	20.02	0.60	0.60	3.25	4.54	12.28	184.91 QAR	1.85	15.70
INDUSTRIES QAT	15.47	0.45	2.25	6.54	0.13	42.32	93.59 QAR	2.50	14.05
QA ISLAMIC BK	18.28	0.55	0.44	6.28	0.16	6.84	43.19 QAR	1.81	13.63
MASRAF AL RAYA	4.88	0.16	-1.26	0.58	8.91	7.68	45.37 QAR	2.47	16.43
MESAIEED PETRO	2.21	0.96	-0.85	6.30	-2.04	8.01	27.78 QAR	1.66	16.94
OMAN									
BANK MUSCAT	0.498	0.00	1.21	5.49	11.11	38.89	1.79 OMR	0.85	8.33
OMANTEL	0.744	2.76	4.52	5.71	0.00	2.21	0.56 OMR	0.99	7.69
BANK DHOFAR	0.126	0.80	0.00	-2.34	6.84	28.87	0.37 QAR	0.53	14.93
NAT BANK OF OMAN	0.192	2.67	3.24	-0.52	3.24	19.38	0.31 QAR	0.56	12.71
OMINVEST	0.310	3.33	3.33	0.00	-1.27	-8.28	0.25 QAR	0.91	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, Security Performance

Kuwait

The market is up today by + 0.72 %The leading sector best performance indices today are Consumer Disc 1.3 % Health care 1.25 % Financial services 1.06 % respectively.

KSA

Saudi Armco has a negative performance today by -0.14 %, SABIC have down performance today by -1.72%

STC has a negative performance today by -1.07%, Al Rajhi Bank has a negative performance today by -1.27%

UAE

ETISALAT AD closed down today by -4.06%, and act defensively with COVID19



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