

شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, December 26, 2021



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



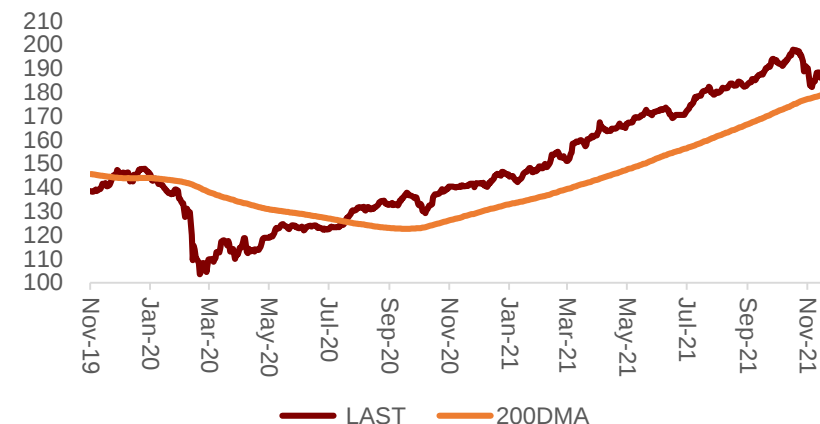
Market Watch

26 December 2021

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,161.33	-0.98	-0.97	3.72	-2.90	28.45	9,982 SAR	2.48	17.69
Qatar (QE Index)	11,652.25	-0.38	-0.19	2.45	1.56	11.78	593 QAR	1.65	15.94
Dubai (DFMGI)	3,158.83	0.45	-3.49	2.80	11.01	26.76	316 AED	1.54	23.09
Abu Dhabi (ADI)	8,394.14	-0.44	-5.22	-1.78	9.03	66.37	1,433 AED	1.83	15.26
Bahrain (BAX)	1,786.48	0.39	0.24	3.29	4.74	19.92	18 BHD	1.50	9.81
MUSCAT SE INDEX	4,122.42	-0.06	2.28	3.05	4.56	12.67	5 OMR	0.87	13.25
SP GCC Comp LMC	189.43	0.00	-0.44	3.96	2.09	33.60			
Developed Markets									
MSCI World Index	3,206.85	0.02	2.14	3.39	6.66	19.21			
U.S. (S&P 500)	4,725.79	0.33	2.28	3.48	9.71	25.82			
U.K. (FTSE 100)	7,372.10	-0.02	1.41	4.43	4.03	14.11			
Japan (Topix)	1,986.78	-0.13	0.12	3.03	-2.14	10.09			
Emerging Markets									
MSCI EM Index	1,220.55	0.08	0.35	0.67	-2.60	-5.48			
China (SSE Composite)	3,618.05	-0.69	-0.39	1.52	1.40	4.17			
India (Sensex)	57,124.31	-0.33	0.20	0.10	-3.39	19.63			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,025.39	-0.22	0.75	3.51	2.38	26.67	41.76 KWD	2.09	25.90
Kuwait Premier Index	7,631.40	-0.24	1.17	3.97	1.88	26.11	31.29 KWD	2.25	26.35
Kuwait Main Index	5,844.42	-0.17	-0.52	2.12	3.94	28.38	10.47 KWD	1.61	24.65
NIC 50	8,525.85	0.12	-0.61	2.32	0.57	27.59	28.60 KWD	2.23	25.35
Kuwait Sector									
Banking	1,619.00	-0.26	-0.26	3.93	2.71	28.24	24.11 KWD	1.29	27.35
Telecom	1,088.01	0.21	0.21	3.04	-0.69	-1.30	3.33 KWD	0.90	14.81
Industrials	1,147.51	-0.12	-0.12	2.58	-1.68	28.77	4.08 KWD	0.87	13.66
Financial services	1,403.93	-0.43	-0.43	4.02	6.45	51.01	3.63 KWD	0.85	12.51
Real estate	1,329.31	0.15	0.15	2.82	3.90	39.54	2.86 KWD	0.74	50.27
Basic materials	1,044.19	-0.74	-0.74	5.94	-4.09	16.20	0.94 KWD	1.95	27.78
Health care	807.01	0.00	0.00	-0.24	1.40	-2.37	0.40 KWD	6.11	12.03
Consumer services	735.13	-0.56	-0.56	0.32	-6.17	-1.50	0.69 KWD	0.90	15.56
Insurance	1,464.51	-0.03	-0.03	-7.91	1.00	26.67	0.61 KWD	0.75	8.41
Consumer Disc	1,315.65	-1.71	-1.71	8.17	17.76	60.72	0.23 KWD	1.35	9.05
Energy	1,430.33	0.46	0.47	3.10	3.89	11.98	0.30 KWD	1.03	14.88
Technology	727.50	-2.91	-2.91	-1.96	1.83	44.72	0.01 KWD	0.89	0.00
Utilities	594.74	0.00	-0.44	-2.59	-4.64	-18.41	0.25 KWD	4.03	19.29

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices mixed, U.S. crude falls after COVID-19 flight cancellations. U.S. West Texas Intermediate crude futures fell 41 cents, or 0.6%, to \$73.38 a barrel by 0053 GMT. The contract did not trade on Friday because U.S. markets were closed for the Christmas holiday.

Kuwait Market

The market closed today down by -0.22%, value traded 45 million KD, Premier market value traded reached 32.5 million KD and closed at 7,631.4 down by -0.24%.

Saudi Market

The Market closed down by 0.98%, with the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

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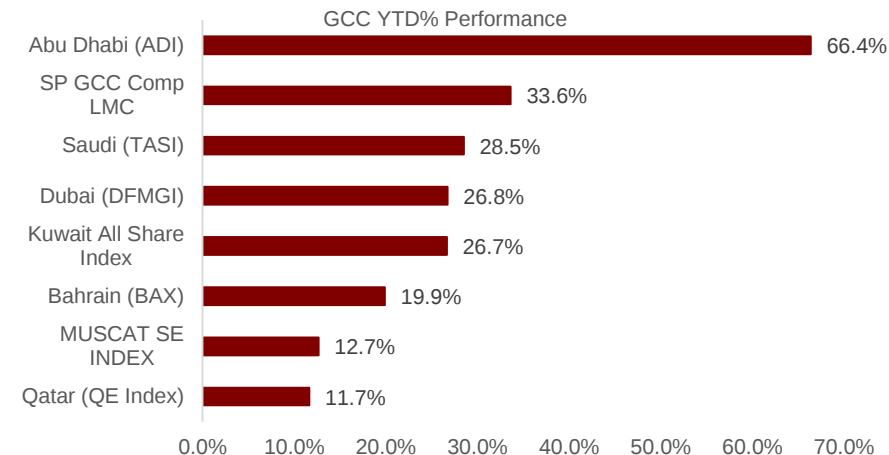
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.990	-0.90	-0.90	0.61	3.88	23.75	7.18 KWD	1.85	27.00
KFH	0.838	-0.12	-0.12	5.81	1.95	36.16	7.08 KWD	3.26	32.00
Zain	0.595	0.17	0.17	4.57	-0.67	-1.82	2.57 KWD	2.16	13.60
BOUBYAN BANK	0.784	-0.51	-0.51	3.43	2.08	44.93	2.50 KWD	3.57	34.00
Agility	0.947	-0.32	-0.32	2.71	-3.86	54.10	2.12 KWD	0.97	2.02
Saudi Arabia									
ARAMCO	35.50	-0.56	0.71	2.45	-1.39	1.43	7,141.14 SAR	6.68	21.42
SABIC	114.60	-0.87	-1.88	5.92	-10.05	13.02	346.86 SAR	1.99	35.00
STC	110.60	-1.07	-0.18	-0.36	-12.91	4.34	223.64 SAR	3.26	19.69
AL-RAJHI BANK	140.00	-0.85	-1.41	5.90	14.19	90.22	353.06 SAR	5.55	25.26
NCB	63.00	-1.41	0.32	4.30	2.61	45.33	286.19 SAR	1.77	18.36
United Arab Emirates									
ETISALAT.AD	31.00	-0.26	-15.99	-2.94	29.06	83.43	270.30 AED	5.87	29.28
FAB.AD	19.00	-0.73	-0.73	-0.94	6.86	47.29	209.01 AED	1.91	17.20
EMIRATES NBD	13.55	0.00	-4.24	2.65	-4.58	31.55	85.59 AED	1.00	10.73
DB ISLAMIC BK	5.38	0.37	-3.41	4.26	8.69	16.70	38.81 AED	1.02	14.29
EMAAR PROPERT	4.76	0.00	-4.80	1.49	16.67	34.84	38.94 AED	0.60	12.35
Qatar									
QNB	20.04	-0.74	0.55	3.20	4.49	12.23	186.48 QAR	1.86	15.84
INDUSTRIES QAT	15.40	-0.45	1.78	6.06	-0.32	41.67	93.59 QAR	2.50	14.05
QA ISLAMIC BK	18.23	0.00	0.27	6.10	0.00	6.66	43.08 QAR	1.80	13.59
MASRAF AL RAYA	4.84	-0.62	-0.62	-0.21	8.06	6.84	45.29 QAR	2.46	16.40
MESAIEED PETRO	2.18	-0.46	-0.46	4.81	-3.41	6.50	27.51 QAR	1.65	16.78
OMAN									
BANK MUSCAT	0.494	-1.20	0.00	4.22	9.78	37.22	1.79 OMR	0.85	8.33
OMANTEL	0.740	0.00	4.52	5.71	0.00	2.21	0.56 OMR	0.99	7.69
BANK DHOFAR	0.126	0.00	0.00	-1.56	7.69	29.90	0.38 QAR	0.53	14.93
NAT BANK OF OMAN	0.195	2.09	1.56	1.56	5.41	21.88	0.31 QAR	0.56	12.71
OMINVEST	0.300	-1.96	-1.96	-3.23	-4.46	-11.24	0.25 QAR	0.89	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
15-Dec-21	20.64%	12.12%	0.06%	2.80%	0.41%	4.53%	2.73%	10.34%	5.30%	4.35%
22-Dec-21	20.67%	12.17%	0.06%	0.28%	0.41%	4.48%	2.74%	10.37%	5.27%	4.56%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.22 %The leading sector bottom performance indices today are Technology -2.91 % Consumer Disc -1.71 % Basic materials -0.74 % respectively

KSA

Saudi Armco has a negative performance today by 0.6%, SABIC has down performance today by 0.9%

STC has a negative performance today by 1.1%, Al Rajhi Bank has a negative performance today by 0.9%

UAE

ETISALAT AD closed down today by 0.3%, and act defensively with COVID19



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