

شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, December 27, 2021



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



Market Watch

27 December 2021

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
GCC Markets									
Saudi (TASI)	11,161.04	-0.07	-0.98	3.71	-2.91	28.44	9,895 SAR	2.44	17.58
Qatar (QE Index)	11,619.59	-0.28	-0.66	2.05	1.17	11.34	587 QAR	1.64	15.76
Dubai (DFMGI)	3,188.12	0.93	1.39	3.75	12.04	27.94	320 AED	1.56	23.56
Abu Dhabi (ADI)	8,403.95	0.12	-0.33	-1.67	9.16	66.57	1,433 AED	1.83	15.28
Bahrain (BAX)	1,786.81	0.02	0.41	3.31	4.76	19.94	18 BHD	1.52	9.94
MUSCAT SE INDEX	4,104.90	-0.42	-0.49	2.61	4.12	12.19	5 OMR	0.87	13.25
SP GCC Comp LMC	187.99	-0.04	-0.76	3.17	1.31	33.58			

Developed Markets

MSCI World Index	3,237.70	0.96	0.96	4.38	7.69	20.36			
U.S. (S&P 500)	4,791.19	0.33	1.38	4.91	11.23	27.56			
U.K. (FTSE 100)	7,372.10	-0.02	1.41	4.43	4.03	14.11			
Japan (Topix)	2,003.54	1.30	0.84	3.90	-1.31	11.02			

Emerging Markets

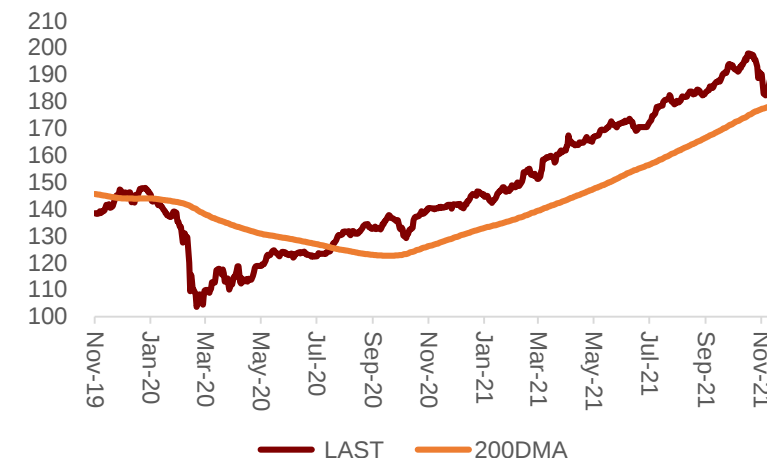
MSCI EM Index	1,221.76	0.10	0.10	0.77	-2.50	-5.38			
China (SSE Composite)	3,616.87	0.02	-0.04	1.48	1.36	4.14			
India (Sensex)	57,791.47	0.65	1.18	1.28	-2.25	21.04			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Kuwait									
Kuwait All Share Index	7,026.77	0.00	-0.20	3.49	2.36	26.70	41.72 KWD	2.08	25.90
Kuwait Premier Index	7,635.83	0.00	-0.18	3.95	1.86	26.19	31.26 KWD	2.24	26.36
Kuwait Main Index	5,838.74	0.00	-0.26	2.10	3.92	28.26	10.46 KWD	1.60	24.61
NIC 50	8,510.75	-0.18	-0.61	2.32	0.57	27.36	28.60 KWD	2.22	25.36

Kuwait Sector

Banking	1,622.12	0.00	-0.07	4.13	2.91	28.49	24.12 KWD	1.29	27.36
Telecom	1,089.37	0.00	0.33	3.17	-0.57	-1.17	3.34 KWD	0.90	14.79
Industrials	1,142.60	0.00	-0.54	2.14	-2.10	28.22	4.06 KWD	0.88	13.67
Financial services	1,403.69	0.00	-0.45	4.00	6.43	50.98	3.61 KWD	0.85	12.49
Real estate	1,321.73	0.00	-0.42	2.24	3.31	38.75	2.85 KWD	0.74	50.25
Basic materials	1,035.80	0.00	-1.53	5.09	-4.86	15.27	0.92 KWD	1.93	27.43
Health care	807.01	0.00	0.00	-0.24	1.40	-2.37	0.40 KWD	6.11	12.03
Consumer services	738.95	0.00	-0.04	0.84	-5.69	-0.99	0.68 KWD	0.87	15.17
Insurance	1,471.96	0.00	0.48	-7.44	1.51	27.31	0.62 KWD	0.77	8.48
Consumer Disc	1,311.96	0.00	-1.98	7.87	17.43	60.27	0.23 KWD	1.35	9.03
Energy	1,410.37	0.00	-0.94	1.66	2.44	10.42	0.29 KWD	1.03	15.16
Technology	691.13	0.00	-7.77	-6.86	-3.26	37.48	0.01 KWD	0.82	0.00
Utilities	597.37	0.00	0.00	-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 near one-month high on easing concerns over Omicron

U.S. West Texas Intermediate (WTI) crude rose 18 cents, or 0.2%, to \$75.75 a barrel, gaining for a fifth straight session. Brent crude rose 7 cents, or 0.1%, to \$78.67 a barrel, by 0115 GMT.

Kuwait Market

The market closed today up by 0.02%, value traded 30.4 million KD, Premier market value traded reached 19.5 million KD and closed at 7,635.8 up by 0.06%.

Saudi Market

The Market closed down by -0.07%, with the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

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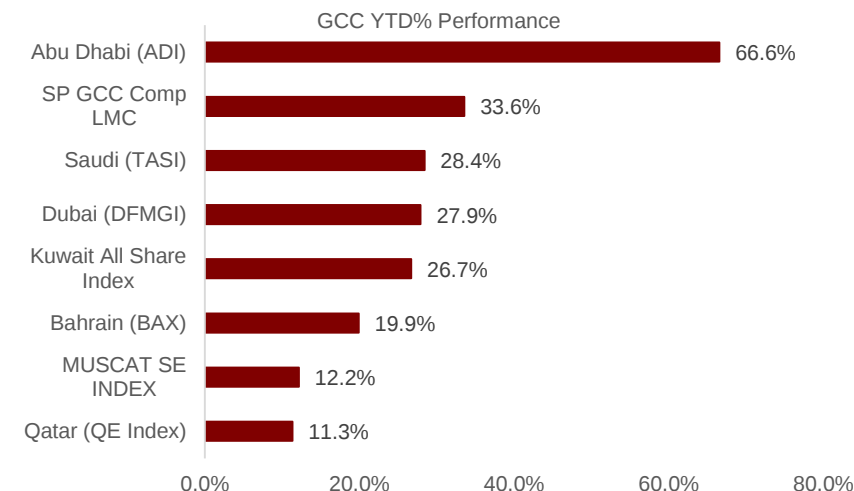
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.999	0.61	-0.30	1.52	4.83	24.88	7.17 KWD	1.85	27.00
KFH	0.837	-0.36	-0.48	5.68	1.82	36.00	7.05 KWD	3.24	32.00
Zain	0.597	0.34	0.51	4.92	-0.33	-1.49	2.58 KWD	2.17	13.67
BOUBYAN BANK	0.790	0.89	0.38	4.22	2.86	46.04	2.52 KWD	3.58	34.00
Agility	0.943	-0.53	-0.84	2.28	-4.26	53.45	2.10 KWD	0.96	2.01
Saudi Arabia									
ARAMCO	35.40	-0.28	-0.84	2.16	-1.67	1.14	7,080.00 SAR	6.62	21.48
SABIC	115.00	0.35	-0.52	6.28	-9.73	13.41	345.00 SAR	1.98	35.00
STC	109.80	-0.54	-1.79	-1.08	-13.54	3.58	219.60 SAR	3.20	19.55
AL-RAJHI BANK	139.00	-0.71	-1.56	5.14	13.38	88.86	347.50 SAR	5.46	25.26
NCB	63.70	1.11	-0.31	5.46	3.75	46.94	285.25 SAR	1.77	18.27
United Arab Emirates									
ETISALAT.AD	31.02	0.26	0.00	-2.88	29.14	83.55	270.30 AED	5.87	29.28
FAB.AD	18.98	-0.11	-0.84	-1.04	6.75	47.13	207.26 AED	1.90	17.05
EMIRATES NBD	13.80	0.74	0.74	4.55	-2.82	33.98	86.22 AED	1.01	10.81
DB ISLAMIC BK	5.48	1.30	1.68	6.20	10.71	18.87	39.46 AED	1.03	14.53
EMAAR PROPERT	4.89	1.47	1.47	4.26	19.85	38.53	39.51 AED	0.61	12.54
Qatar									
QNB	19.90	-0.70	-1.44	2.63	3.92	11.61	183.80 QAR	1.83	15.61
INDUSTRIES QAT	15.34	-0.39	-0.84	5.65	-0.71	41.12	92.81 QAR	2.48	13.93
QA ISLAMIC BK	18.23	0.00	0.00	5.99	-0.11	6.55	43.08 QAR	1.80	13.59
MASRAF AL RAYA	4.86	0.41	-0.21	0.21	8.51	7.28	45.20 QAR	2.46	16.37
MESAEED PETRO	2.17	-0.55	-1.00	4.23	-3.94	5.91	27.24 QAR	1.63	16.61
OMAN									
BANK MUSCAT	0.496	0.40	0.00	4.64	10.22	37.78	1.77 OMR	0.84	8.33
OMANTEL	0.740	0.00	0.54	5.71	0.00	2.21	0.56 OMR	0.99	7.69
BANK DHOFAR	0.126	3.17	3.17	-1.56	7.69	29.90	0.38 QAR	0.53	14.93
NAT BANK OF OMAN	0.196	0.00	1.56	2.08	5.95	22.50	0.32 QAR	0.57	12.71
OMINVEST	0.306	2.00	0.00	-1.29	-2.55	-9.47	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, Borsa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by 0.02%The leading sector top performance indices today are Banking 0.2%, Telecom 0.12% respectively

KSA

Saudi Armco has a negative performance today by 0.3%, SABIC has up performance today by 0.4%

STC has a negative performance today by 0.5%, Al Rajhi Bank has a negative performance today by 0.7%

UAE

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



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