



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, December 28, 2021



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

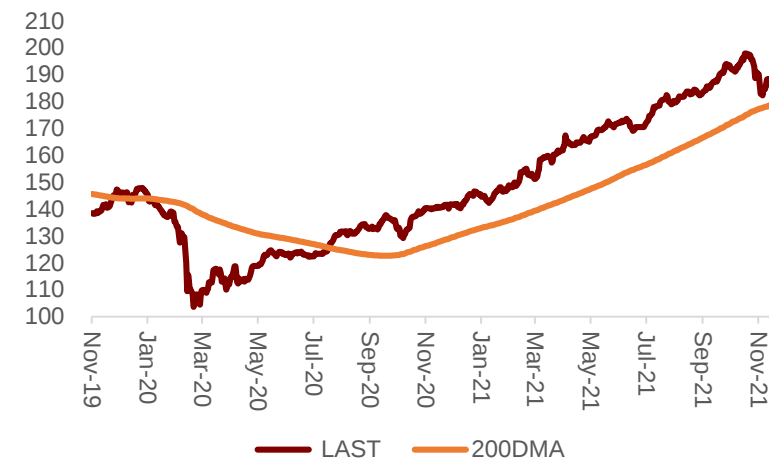


Market Watch

28 December 2021

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,315.32	1.38	0.39	5.14	-1.57	30.22	9,895 SAR	2.44	17.58
Qatar (QE Index)	11,675.27	0.48	-0.18	2.54	1.65	11.88	587 QAR	1.64	15.76
Dubai (DFMGI)	3,199.06	0.34	1.73	4.11	12.43	28.37	320 AED	1.56	23.56
Abu Dhabi (ADI)	8,391.27	-0.15	-0.48	-1.82	8.99	66.32	1,433 AED	1.83	15.28
Bahrain (BAX)	1,791.23	0.25	0.66	3.56	5.02	20.23	18 BHD	1.52	9.94
MUSCAT SE INDEX	4,141.09	0.88	0.39	3.52	5.04	13.18	5 OMR	0.87	13.25
SP GCC Comp LMC	189.91	1.02	0.25	4.22	2.35	34.95			
Developed Markets									
MSCI World Index	3,237.70	0.96	0.96	4.38	7.69	20.36			
U.S. (S&P 500)	4,786.49	0.33	1.25	4.77	11.08	27.39			
U.K. (FTSE 100)	7,372.10	-0.02	1.41	4.43	4.03	14.11			
Japan (Topix)	2,005.02	0.00	0.92	3.98	-1.24	11.10			
Emerging Markets									
MSCI EM Index	1,221.76	0.00	0.10	0.77	-2.50	-5.38			
China (SSE Composite)	3,630.11	0.39	0.33	1.86	1.74	4.52			
India (Sensex)	57,897.48	0.83	1.35	1.46	-2.08	21.25			
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,046.34	0.28	0.08	3.78	2.64	27.05	41.72 KWD	2.08	25.90
Kuwait Premier Index	7,653.50	0.23	0.05	4.19	2.09	26.48	31.26 KWD	2.24	26.36
Kuwait Main Index	5,863.40	0.42	0.16	2.53	4.36	28.80	10.46 KWD	1.60	24.61
NIC 50	8,531.16	0.24	-0.61	2.32	0.57	27.67	28.60 KWD	2.22	25.36
Kuwait Sector									
Banking	1,625.36	0.20	0.13	4.33	3.12	28.75	24.12 KWD	1.29	27.36
Telecom	1,093.64	0.39	0.73	3.58	-0.18	-0.79	3.34 KWD	0.90	14.79
Industrials	1,146.36	0.33	-0.22	2.48	-1.78	28.65	4.06 KWD	0.88	13.67
Financial services	1,406.95	0.23	-0.21	4.25	6.67	51.33	3.61 KWD	0.85	12.49
Real estate	1,329.52	0.59	0.17	2.84	3.92	39.56	2.85 KWD	0.74	50.25
Basic materials	1,028.75	-0.68	-2.20	4.37	-5.50	14.48	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	732.79	-0.83	-0.88	0.00	-6.47	-1.82	0.68 KWD	0.87	15.17
Insurance	1,513.75	2.84	3.34	-4.81	4.39	30.93	0.62 KWD	0.77	8.48
Consumer Disc	1,312.55	0.04	-1.94	7.92	17.49	60.34	0.23 KWD	1.35	9.03
Energy	1,439.82	2.09	1.13	3.79	4.58	12.72	0.29 KWD	1.03	15.16
Technology	720.23	4.21	-3.88	-2.94	0.81	43.27	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 prices climb as worries over fuel demand recede

U.S. West Texas Intermediate (WTI) crude rose \$1.24, or 1.6%, to \$76.80 a barrel, gaining for a fifth straight session.. Brent crude rose \$1.13, or 1.4%, to \$79.73 per barrel

Kuwait Market

The market closed today up by 0.28%, value traded 35.5 million KD, Premier market value traded reached 24.7 million KD and closed at 7,653.5 up by 0.23%.

Saudi Market

The Market closed up by 1.4%, with the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

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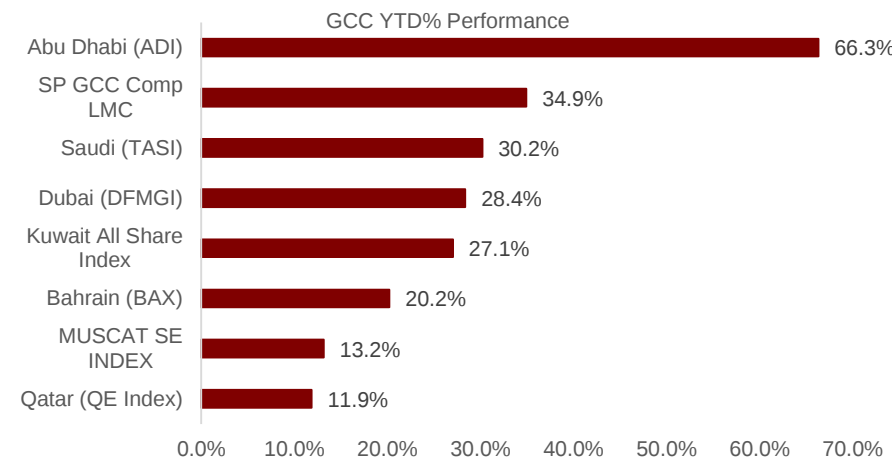
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.000	0.40	0.10	1.63	4.93	25.00	7.17 KWD	1.85	27.00
KFH	0.834	-0.12	-0.60	5.30	1.46	35.51	7.05 KWD	3.24	32.00
Zain	0.599	0.34	0.84	5.27	0.00	-1.16	2.58 KWD	2.17	13.67
BOUBAYAN BANK	0.798	0.88	1.27	5.28	3.91	47.52	2.52 KWD	3.58	34.00
Agility	0.945	0.32	-0.53	2.49	-4.06	53.77	2.10 KWD	0.96	2.01
Saudi Arabia									
ARAMCO	35.60	0.56	-0.28	2.74	-1.11	1.71	7,080.00 SAR	6.62	21.48
SABIC	117.00	1.74	1.21	8.13	-8.16	15.38	345.00 SAR	1.98	35.00
STC	111.60	1.64	-0.18	0.54	-12.13	5.28	219.60 SAR	3.20	19.55
AL-RAJHI BANK	143.00	2.88	1.27	8.17	16.64	94.29	347.50 SAR	5.46	25.26
NCB	64.20	0.78	0.47	6.29	4.56	48.10	285.25 SAR	1.77	18.27
United Arab Emirates									
ETISALAT.AD	30.88	-0.64	-0.64	-3.32	28.56	82.72	270.30 AED	5.87	29.28
FAB.AD	18.80	-0.95	-1.78	-1.98	5.74	45.74	207.26 AED	1.90	17.05
EMIRATES NBD	13.60	-0.37	0.37	3.03	-4.23	32.04	86.22 AED	1.01	10.81
DB ISLAMIC BK	5.47	0.37	2.05	6.01	10.51	18.66	39.46 AED	1.03	14.53
EMAAR PROPERT	4.89	1.24	2.73	4.26	19.85	38.53	39.51 AED	0.61	12.54
Qatar									
QNB	20.10	1.01	-0.45	3.66	4.96	12.73	183.80 QAR	1.83	15.61
INDUSTRIES QAT	15.48	0.91	0.06	6.61	0.19	42.41	92.81 QAR	2.48	13.93
QA ISLAMIC BK	18.30	0.38	0.38	6.40	0.27	6.96	43.08 QAR	1.80	13.59
MASRAF AL RAYA	4.85	-0.19	-0.39	0.02	8.31	7.09	45.20 QAR	2.46	16.37
MESAIEED PETRO	2.16	-0.28	-1.28	3.94	-4.21	5.62	27.24 QAR	1.63	16.61
OMAN									
BANK MUSCAT	0.498	0.81	0.00	4.64	10.22	37.78	1.77 OMR	0.84	8.33
OMANTEL	0.744	0.54	1.63	6.86	1.08	3.31	0.56 OMR	0.99	7.69
BANK DHOFAR	0.125	-0.79	-0.79	-2.34	6.84	28.87	0.38 QAR	0.53	14.93
NAT BANK OF OMAN	0.196	0.51	2.08	2.08	5.95	22.50	0.32 QAR	0.57	12.71
OMINVEST	0.310	1.31	1.31	0.00	-1.27	-8.28	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 up today by 0.28% The leading sector top performance indices today are Technology 4.2%, Insurance 2.8%, Energy 2.1% respectively

KSA

Saudi Armco has a positive performance today by 0.6%, SABIC has up performance today by 1.7%

STC has a positive performance today by 1.6%, Al Rajhi Bank has a positive performance today by 2.9%

UAE

ETISALAT AD closed down today by 0.6%, and act defensively with COVID19



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