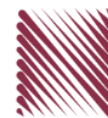


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, December 29, 2021



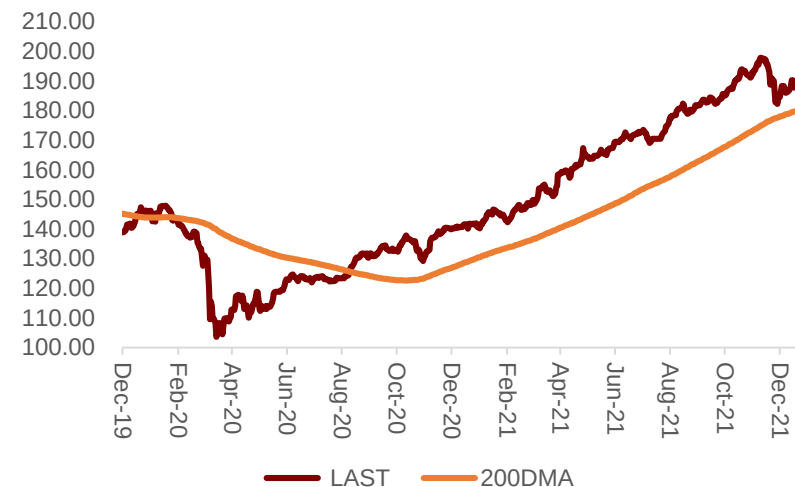


Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
GCC Markets									
Saudi (TASI)	11,199.84	-1.02	-0.64	4.07	-2.57	28.89	9,860 SAR	2.39	17.71
Qatar (QE Index)	11,678.93	0.03	-0.15	2.57	1.69	11.91	591 QAR	1.63	15.79
Dubai (DFMGI)	3,174.09	-0.78	0.94	3.29	11.55	27.37	318 AED	1.53	23.44
Abu Dhabi (ADI)	8,450.53	0.71	0.23	-1.12	9.76	67.49	1,446 AED	1.84	15.28
Bahrain (BAX)	1,793.88	0.15	0.81	3.72	5.18	20.41	18 BHD	1.52	9.97
MUSCAT SE INDEX	4,136.24	-0.12	0.27	3.40	4.91	13.05	5 OMR	0.88	13.25
SP GCC Comp LMC	189.91	1.02	-0.31	3.63	1.77	34.19			
Developed Markets									
MSCI World Index	3,239.28	0.05	1.16	4.58	7.89	20.59			
U.S. (S&P 500)	4,786.35	0.33	1.42	4.95	11.27	27.61			
U.K. (FTSE 100)	7,433.00	0.83	0.66	5.12	4.72	14.86			
Japan (Topix)	1,998.99	-0.30	0.54	3.59	-1.61	10.69			
Emerging Markets									
MSCI EM Index	1,227.12	0.44	-0.21	0.45	-2.81	-5.68			
China (SSE Composite)	3,597.00	-0.91	0.24	1.76	1.64	4.42			
India (Sensex)	57,806.49	-0.16	1.43	1.54	-2.00	21.34			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Kuwait									
Kuwait All Share Index	7,044.34	-0.03	0.05	3.75	2.61	27.02	41.82 KWD	2.09	26.12
Kuwait Premier Index	7,650.95	-0.03	0.01	4.16	2.06	26.44	31.33 KWD	2.24	26.46
Kuwait Main Index	5,862.62	-0.01	0.14	2.51	4.34	28.78	10.49 KWD	1.61	25.21
NIC 50	8,527.61	-0.04	0.02	4.05	2.28	27.52	28.60 KWD	2.22	25.46
Kuwait Sector									
Banking	1,625.08	-0.02	0.12	4.32	3.10	28.72	24.18 KWD	1.28	27.46
Telecom	1,093.88	0.02	0.75	3.60	-0.16	-0.76	3.35 KWD	0.90	15.11
Industrials	1,143.53	-0.25	-0.46	2.23	-2.02	28.33	4.06 KWD	0.87	13.79
Financial services	1,410.85	0.28	0.06	4.53	6.97	51.75	3.62 KWD	0.85	12.51
Real estate	1,325.64	-0.29	-0.12	2.54	3.61	39.16	2.86 KWD	0.75	51.66
Basic materials	1,021.84	-0.67	-2.86	3.67	-6.14	13.72	0.91 KWD	1.92	27.03
Health care	807.01	0.00	0.00	-0.24	1.40	-2.37	0.40 KWD	6.11	12.03
Consumer services	731.77	-0.14	-1.01	-0.14	-6.60	-1.95	0.68 KWD	0.87	15.19
Insurance	1,512.52	-0.08	3.25	-4.89	4.31	30.82	0.63 KWD	0.77	8.56
Consumer Disc	1,319.52	0.53	-1.42	8.49	18.11	61.19	0.22 KWD	1.34	8.93
Energy	1,453.76	0.97	2.11	4.79	5.59	13.81	0.30 KWD	1.02	15.00
Technology	720.23	0.00	-3.88	-2.94	0.81	43.27	0.01 KWD	0.85	0.00
Utilities	594.74	0.00	-0.44	-2.59	-4.64	-18.41	0.25 KWD	4.01	19.20

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices rose on Thursday to extend several consecutive days of gains, buoyed by data showing U.S. fuel demand holding up well despite soaring omicron coronavirus infections. Brent crude futures rose 17 cents, or 0.2%, to \$79.40 a barrel at 0217 GMT, climbing for a fourth day in a row . U.S. West Texas Intermediate (WTI) crude futures rose 23 cents, or 0.3%, to \$76.79 a barrel for a seventh straight session of gains.

Kuwait Market

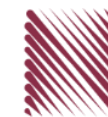
The market closed today down by 0.03%, value traded 45.1 million KD, Premier market value traded reached 33.9 million KD and closed at 7,655.95 down by 0.03%.

Saudi Market

The Market closed down by 1.02%, with the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



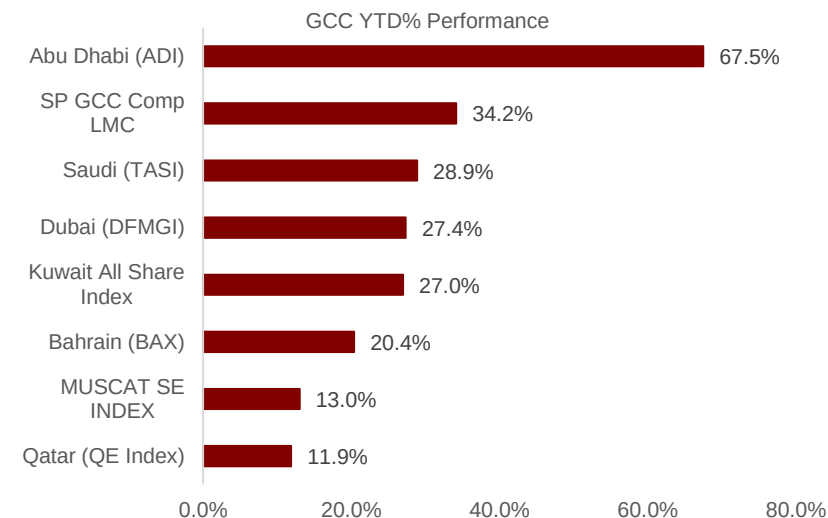
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	0.998	-0.20	-0.10	1.42	4.72	24.75	7.17 KWD	1.85	27.00
KFH	0.834	0.00	-0.60	5.30	1.46	35.51	7.04 KWD	3.24	32.00
Zain	0.598	-0.17	0.67	5.10	-0.17	-1.32	2.59 KWD	2.18	13.69
BOUBAYAN BANK	0.795	-0.38	0.89	4.88	3.52	46.96	2.53 KWD	3.60	34.00
Agility	0.947	0.21	-0.32	2.71	-3.86	54.10	2.11 KWD	0.97	2.02
Saudi Arabia									
ARAMCO	35.20	-1.12	-1.40	1.59	-2.22	0.57	7,035.13 SAR	6.59	21.54
SABIC	115.00	-1.71	-0.52	6.28	-9.73	13.41	344.76 SAR	1.98	35.00
STC	110.40	-1.08	-1.25	-0.54	-13.07	4.15	220.65 SAR	3.22	19.76
AL-RAJHI BANK	141.00	-1.40	-0.14	6.66	15.01	91.58	352.26 SAR	5.54	25.80
NCB	64.00	-0.31	0.16	5.96	4.23	47.64	286.39 SAR	1.78	18.62
United Arab Emirates									
ETISALAT.AD	31.00	0.39	-0.26	-2.94	29.06	83.43	269.60 AED	5.85	29.21
FAB.AD	18.90	0.53	-1.25	-1.46	6.30	46.51	206.39 AED	1.89	16.98
EMIRATES NBD	13.45	-1.10	-0.74	1.89	-5.28	30.58	84.96 AED	1.00	10.65
DB ISLAMIC BK	5.43	-0.73	1.31	5.23	9.70	17.79	39.32 AED	1.03	14.48
EMAAR PROPERT	4.86	-0.61	2.10	3.62	19.12	37.68	39.75 AED	0.61	12.61
Qatar									
QNB	20.17	0.35	-0.10	4.02	5.33	13.12	186.30 QAR	1.86	15.82
INDUSTRIES QAT	15.48	0.00	0.06	6.61	0.19	42.41	93.65 QAR	2.50	14.06
QA ISLAMIC BK	18.31	0.05	0.44	6.45	0.33	7.01	43.27 QAR	1.81	13.65
MASRAF AL RAYA	4.84	-0.23	-0.62	-0.21	8.06	6.84	45.01 QAR	2.45	16.30
MESAIEED PETRO	2.18	0.83	-0.46	4.81	-3.41	6.50	27.39 QAR	1.64	16.70
OMAN									
BANK MUSCAT	0.490	-1.21	-0.81	3.80	9.33	36.67	1.76 OMR	0.84	8.33
OMANTEL	0.752	0.54	2.72	8.00	2.16	4.42	0.57 OMR	1.01	7.69
BANK DHOFAR	0.126	0.80	-0.79	-2.34	6.84	28.87	0.37 QAR	0.53	14.93
NAT BANK OF OMAN	0.196	0.00	2.08	2.08	5.95	22.50	0.32 QAR	0.58	12.71
OMINVEST	0.310	0.00	1.31	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
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 0.03%The leading sector bottom performance indices today are Basic Materials -0.7%, Insurance 2.8%, Real estate -0.3% respectively

KSA

Saudi Armco has a negative performance today by -1.1%, SABIC has down performance today by -1.7%

STC has a negative performance today by 1.1%, Al Rajhi Bank has a positive performance today by -1.4%

UAE

ETISALAT AD closed up today by 0.4%, and act defensively with COVID19



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