



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Wednesday, December 30, 2021



# DAILY MARKETS WRAP,

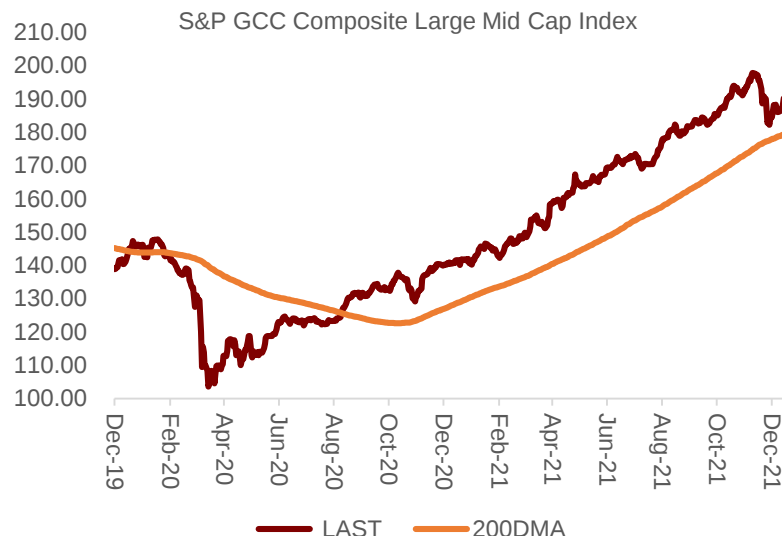
## NIC RESEARCH AND STUDIES DEP



### Market Watch

| Description              | Close     | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|--------------------------|-----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>GCC Markets</b>       |           | %     | %     | %     | %     | %     |               |      |       |
| Saudi (TASI)             | 11,281.71 | 0.73  | 0.09  | 4.83  | -1.86 | 29.83 | 10,011 SAR    | 2.42 | 17.31 |
| Qatar (QE Index)         | 11,625.81 | -0.45 | -0.60 | 2.10  | 1.22  | 11.40 | 590 QAR       | 1.63 | 15.86 |
| Dubai (DFMGI)            | 3,195.91  | 0.69  | 1.63  | 4.00  | 12.31 | 28.25 | 321 AED       | 1.57 | 24.95 |
| Abu Dhabi (ADI)          | 8,488.36  | 0.45  | 0.68  | -0.68 | 10.26 | 68.24 | 1,459 AED     | 1.85 | 15.75 |
| Bahrain (BAX)            | 1,797.25  | 0.19  | 1.00  | 3.91  | 5.38  | 20.64 | 18 BHD        | 1.52 | 9.98  |
| MUSCAT SE INDEX          | 4,129.54  | -0.16 | 0.11  | 3.23  | 4.74  | 12.87 | 5 OMR         | 0.89 | 13.25 |
| SP GCC Comp LMC          | 189.736   | -0.56 | 0.16  | 4.12  | 2.25  | 34.82 |               |      |       |
| <b>Developed Markets</b> |           |       |       |       |       |       |               |      |       |
| MSCI World Index         | 3,243.95  | 0.14  | 0.80  | 4.19  | 7.49  | 20.14 |               |      |       |
| U.S. (S&P 500)           | 4,793.06  | 0.33  | 0.85  | 4.36  | 10.65 | 26.89 |               |      |       |
| U.K. (FTSE 100)          | 7,423.71  | 0.04  | -0.02 | 4.43  | 4.03  | 14.11 |               |      |       |
| Japan (Topix)            | 1,992.33  | -0.33 | 0.15  | 3.32  | -1.86 | 10.40 |               |      |       |
| <b>Emerging Markets</b>  |           |       |       |       |       |       |               |      |       |
| MSCI EM Index            | 1,217.93  | -0.75 | 1.02  | 1.62  | -1.68 | -4.59 |               |      |       |
| China (SSE Composite)    | 3,619.19  | 0.62  | -0.10 | 2.13  | 2.01  | 4.80  |               |      |       |
| India (Sensex)           | 57,794.32 | -0.02 | 1.64  | 2.08  | -1.48 | 21.99 |               |      |       |

| Description            | Close    | Day Δ | WTD   | MTD   | QTD   | YTD    | M Cap (in Bn) | PBV  | PE    |
|------------------------|----------|-------|-------|-------|-------|--------|---------------|------|-------|
| <b>Kuwait</b>          |          | %     | %     | %     | %     | %      |               |      |       |
| Kuwait All Share Index | 7,043.16 | -0.02 | 0.03  | 3.73  | 2.60  | 26.99  | 41.79 KWD     | 2.09 | 26.13 |
| Kuwait Premier Index   | 7,639.11 | -0.15 | -0.14 | 4.00  | 1.90  | 26.24  | 31.28 KWD     | 2.24 | 26.37 |
| Kuwait Main Index      | 5,886.27 | 0.40  | 0.55  | 2.93  | 4.76  | 29.30  | 10.52 KWD     | 1.62 | 25.52 |
| NIC 50                 | 8,522.47 | -0.06 | -0.61 | 2.32  | 0.57  | 27.54  | 28.60 KWD     | 2.22 | 25.37 |
| <b>Kuwait Sector</b>   |          |       |       |       |       |        |               |      |       |
| Banking                | 1,622.77 | -0.14 | -0.03 | 4.17  | 2.95  | 28.54  | 24.14 KWD     | 1.29 | 27.37 |
| Telecom                | 1,089.37 | -0.41 | 0.33  | 3.17  | -0.57 | -1.17  | 3.34 KWD      | 0.90 | 15.02 |
| Industrials            | 1,141.49 | -0.18 | -0.64 | 2.04  | -2.19 | 28.10  | 4.05 KWD      | 0.86 | 13.76 |
| Financial services     | 1,423.32 | 0.88  | 0.95  | 5.46  | 7.92  | 53.09  | 3.64 KWD      | 0.83 | 12.89 |
| Real estate            | 1,326.41 | 0.06  | -0.07 | 2.60  | 3.67  | 39.24  | 2.86 KWD      | 0.74 | 51.39 |
| Basic materials        | 1,024.78 | 0.29  | -2.58 | 3.97  | -5.87 | 14.04  | 0.91 KWD      | 1.92 | 27.11 |
| Health care            | 797.03   | -1.24 | -1.24 | -1.48 | 0.14  | -3.58  | 0.39 KWD      | 6.16 | 12.03 |
| Consumer services      | 731.11   | -0.09 | -1.10 | -0.23 | -6.69 | -2.04  | 0.69 KWD      | 0.87 | 15.18 |
| Insurance              | 1,533.39 | 1.38  | 4.68  | -3.58 | 5.75  | 32.63  | 0.64 KWD      | 0.78 | 8.53  |
| Consumer Disc          | 1,336.63 | 1.30  | -0.14 | 9.90  | 19.64 | 63.28  | 0.22 KWD      | 1.34 | 8.90  |
| Energy                 | 1,428.15 | -1.76 | 0.31  | 2.95  | 3.73  | 11.81  | 0.30 KWD      | 1.02 | 14.97 |
| Technology             | 683.85   | -5.05 | -8.74 | -7.84 | -4.28 | 36.04  | 0.01 KWD      | 0.81 | 0.00  |
| Utilities              | 600.00   | 0.00  | 0.44  | -1.72 | -3.80 | -17.69 | 0.25 KWD      | 4.04 | 19.37 |



### What Move the GCC markets

#### Oil Prices

Oil prices rose on 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 0.02%, and close the year up by +27% value traded 33.4 million KD, Premier market value traded reached 21.3 million KD and closed at 7,639.11 down by 0.15%.

#### Saudi Market

The Market closed up by +0.73% and close the year positive by +29.83%, with the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



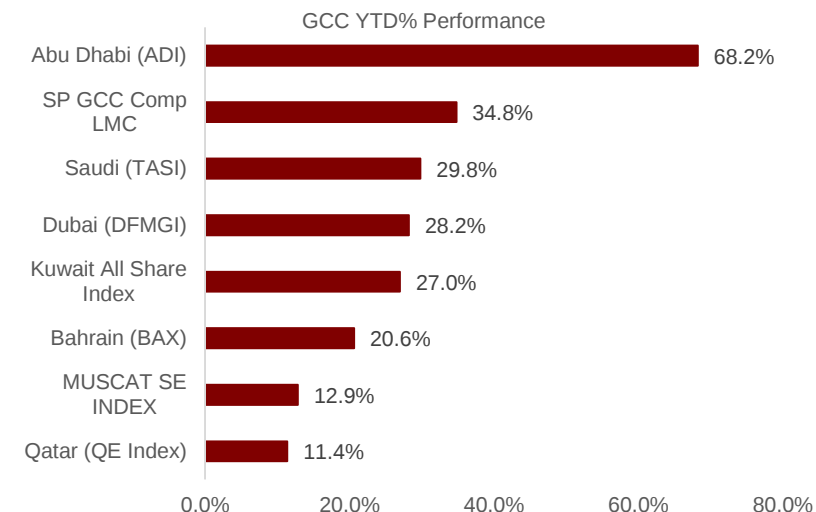
| Description                 | Close  | Day Δ | WTD   | MTD   | QTD    | YTD   | M Cap (in Bn) | PBV  | PE    |
|-----------------------------|--------|-------|-------|-------|--------|-------|---------------|------|-------|
| <b>Blue Chip Watch</b>      |        | %     | %     | %     | %      | %     |               |      |       |
| <b>Kuwait</b>               |        |       |       |       |        |       |               |      |       |
| NBK                         | 0.997  | -0.10 | -0.20 | 1.32  | 4.62   | 24.63 | 7.17 KWD      | 1.85 | 27.00 |
| KFH                         | 0.832  | -0.24 | -0.83 | 5.05  | 1.22   | 35.18 | 7.02 KWD      | 3.23 | 32.00 |
| Zain                        | 0.595  | -0.50 | 0.17  | 4.57  | -0.67  | -1.82 | 2.57 KWD      | 2.17 | 13.62 |
| BOUBYAN BANK                | 0.790  | -0.63 | 0.25  | 4.22  | 2.86   | 46.04 | 2.51 KWD      | 3.58 | 34.00 |
| Agility                     | 0.945  | -0.21 | -0.53 | 2.49  | -4.06  | 53.77 | 2.11 KWD      | 0.97 | 2.01  |
| <b>Saudi Arabia</b>         |        |       |       |       |        |       |               |      |       |
| ARAMCO                      | 35.80  | 1.70  | 0.28  | 3.32  | -0.56  | 2.29  | 7,161.53 SAR  | 6.65 | 21.66 |
| SABIC                       | 116.00 | 0.87  | 0.35  | 7.21  | -8.95  | 14.40 | 348.07 SAR    | 2.01 | 35.00 |
| STC                         | 112.40 | 1.81  | 0.54  | 1.26  | -11.50 | 6.04  | 224.85 SAR    | 3.25 | 19.90 |
| AL-RAJHI BANK               | 141.80 | 0.57  | 0.42  | 7.26  | 15.66  | 92.66 | 354.58 SAR    | 5.63 | 25.59 |
| NCB                         | 64.40  | 0.63  | 0.78  | 6.62  | 4.89   | 48.56 | 288.44 SAR    | 1.80 | 18.68 |
| <b>United Arab Emirates</b> |        |       |       |       |        |       |               |      |       |
| ETISALAT.AD                 | 31.70  | 2.26  | 1.99  | -0.75 | 31.97  | 87.57 | 275.69 AED    | 5.98 | 29.87 |
| FAB.AD                      | 18.84  | -0.32 | -1.57 | -1.77 | 5.96   | 46.05 | 205.73 AED    | 1.88 | 16.93 |
| EMIRATES NBD                | 13.55  | 0.74  | 0.00  | 2.65  | -4.58  | 31.55 | 85.59 AED     | 1.00 | 10.73 |
| DB ISLAMIC BK               | 5.38   | -0.92 | 0.37  | 4.26  | 8.69   | 16.70 | 38.96 AED     | 1.02 | 14.35 |
| EMAAR PROPERT               | 4.89   | 0.62  | 2.73  | 4.26  | 19.85  | 38.53 | 40.00 AED     | 0.61 | 12.69 |
| <b>Qatar</b>                |        |       |       |       |        |       |               |      |       |
| QNB                         | 20.19  | 0.10  | 0.00  | 4.13  | 5.43   | 13.24 | 186.56 QAR    | 1.85 | 15.76 |
| INDUSTRIES QAT              | 15.49  | 0.06  | 0.13  | 6.68  | 0.26   | 42.50 | 93.75 QAR     | 2.47 | 13.87 |
| QA ISLAMIC BK               | 18.33  | 0.11  | 0.55  | 6.57  | 0.44   | 7.13  | 43.33 QAR     | 1.79 | 13.50 |
| MASRAF AL RAYA              | 4.64   | -4.13 | -4.72 | -4.33 | 3.59   | 2.43  | 43.17 QAR     | 2.45 | 16.30 |
| MESAIEED PETRO              | 2.09   | -4.13 | -4.57 | 0.48  | -7.40  | 2.10  | 26.27 QAR     | 1.61 | 16.38 |
| <b>OMAN</b>                 |        |       |       |       |        |       |               |      |       |
| BANK MUSCAT                 | 0.484  | -1.63 | 2.07  | 2.07  | 2.07   | 2.07  | 1.73 OMR      | 0.84 | 8.33  |
| OMANTEL                     | 0.752  | -0.53 | 0.00  | 0.00  | 0.00   | 0.00  | 0.56 OMR      | 1.00 | 7.69  |
| BANK DHOFAR                 | 0.125  | 0.00  | -0.79 | -0.79 | -0.79  | -0.79 | 0.37 QAR      | 0.53 | 14.93 |
| NAT BANK OF OMAN            | 0.197  | 0.51  | -0.51 | -0.51 | -0.51  | -0.51 | 0.32 QAR      | 0.58 | 12.71 |
| OMINVEST                    | 0.306  | -1.29 | 0.00  | 0.00  | 0.00   | 0.00  | 0.25 QAR      | 0.89 | 6.85  |

| Foreign Holding |        |        |       |       |         |       |       |        |       |       |
|-----------------|--------|--------|-------|-------|---------|-------|-------|--------|-------|-------|
| Date            | NBK    | GBK    | CBK   | ABK   | MUTAHED | KIB   | BURG  | KFH    | BOUB  | WARBA |
| 22-Dec-21       | 20.67% | 12.17% | 0.06% | 0.28% | 0.41%   | 4.48% | 2.74% | 10.37% | 5.27% | 4.56% |
| 29-Dec-21       | 20.67% | 12.46% | 0.06% | 0.38% | 0.41%   | 4.48% | 2.68% | 10.34% | 5.23% | 4.57% |

### End of Report

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed and others authorized to receive it.

Sources, Bursa Kuwait , Refinitiv , NIC



### Leading Sector, Security Performance

#### Kuwait

The market closed today down by 0.02%, and close the year up by +27% value traded 33.4 million KD, Premier market value traded reached 21.3 million KD and closed at 7,639.11 down by 0.15%. Leading this year by Consumer Dis +63% , Financial Serv +53% , Real Estate +39%.

#### KSA

Saudi Armco has a positive performance today by +1.7%, SABIC has up performance today by +0.87%

STC has a positive performance today by 1.81%, Al Rajhi Bank has a positive performance today by +0.57%

#### UAE

ETISALAT AD closed up today by 2.26%, and act defensively with COVID19



شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | [www.nic.com.kw](http://www.nic.com.kw)