

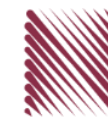


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, August 10th , 2022



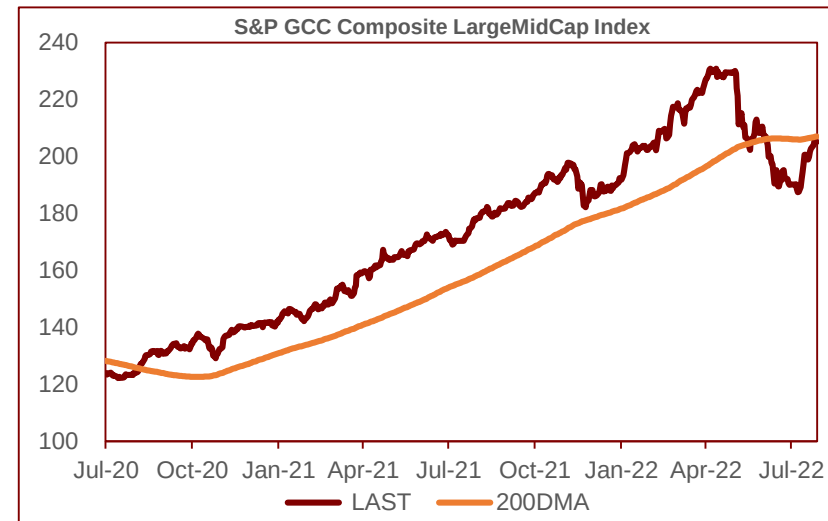


Market Watch

Wednesday, August 10, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,431.45	0.82	1.14	1.90	7.88	10.19	11,941 SAR	2.13	19.08
Qatar (QE Index)	13,568.95	0.37	1.44	1.49	11.30	16.71	685 QAR	1.61	15.64
Dubai (DFMGI)	3,394.24	0.26	2.22	1.69	5.30	6.21	459 AED	1.34	21.52
Abu Dhabi (ADI)	10,198.29	0.71	3.87	5.53	8.79	20.14	1,435 AED	2.15	18.65
Bahrain (BAX)	1,881.31	-0.99	-1.00	-1.27	2.27	4.68	19 BHD	1.18	170.78
MUSCAT SE INDEX	4,652.43	0.05	-0.32	2.65	12.85	12.66	5 OMR	0.98	13.25
SP GCC Comp LMC	207.59	0.63	1.27	1.68	7.84	9.40			
Developed Markets									
MSCI World Index	2,803.37	2.18	1.51	2.08	10.10	-13.25			
U.S. (S&P 500)	4,210.24	2.13	1.40	1.94	11.22	-11.66			
U.K. (FTSE 100)	7,507.11	0.25	0.79	1.13	4.71	1.66			
Japan (Topix)	1,933.65	-0.17	0.15	-0.34	3.36	-2.95			
Emerging Markets									
MSCI EM Index	997.20	-0.45	0.26	0.34	-0.35	-19.06			
China (SSE Composite)	3,230.02	-0.54	1.29	-0.71	-4.96	-11.26			
India (Sensex)	58,817.29	-0.06	0.89	2.17	10.94	0.97			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,690.07	-0.33	-0.55	-0.35	3.80	9.18	45.78 KWD	2.34	21.91
Kuwait Premier Index	8,573.85	-0.24	-0.62	-0.34	4.01	12.24	35.21 KWD	2.48	23.15
Kuwait Main Index	5,853.01	-0.68	-0.32	-0.38	3.03	-0.57	10.57 KWD	1.86	17.76
NIC 50	9,643.76	-0.25	-0.63	-0.35	4.00	13.16	28.60 KWD	2.46	22.15
Kuwait Sector									
Banking	1,843.70	-0.24	-0.81	-0.74	3.53	13.61	27.41 KWD	1.33	24.15
Telecom	1,252.94	-0.04	-0.27	0.70	3.56	15.02	3.84 KWD	0.97	13.48
Industrials	1,254.48	-0.19	-0.18	0.31	7.77	9.90	4.47 KWD	0.92	10.94
Financial services	1,434.49	-0.73	-0.05	-0.25	4.57	0.78	3.73 KWD	0.82	13.93
Real estate	1,252.46	-0.25	0.32	-0.23	3.92	-5.58	2.70 KWD	0.62	34.61
Basic materials	1,017.96	0.01	0.37	1.14	0.50	-0.67	0.91 KWD	1.36	12.73
Health care	458.22	0.00	-0.66	-0.85	-3.75	-42.51	0.23 KWD	2.66	12.57
Consumer services	534.24	-0.89	-1.95	-1.57	1.30	-26.93	0.79 KWD	0.96	40.51
Insurance	1,534.61	-0.51	0.51	1.57	-0.52	0.08	0.64 KWD	0.73	8.02
Consumer Disc	1,527.34	-3.61	-2.45	-0.06	2.59	14.27	0.16 KWD	0.99	10.43
Energy	1,186.42	0.82	2.94	3.43	1.56	-16.93	0.25 KWD	0.82	15.79
Technology	676.57	6.29	2.99	-5.10	-3.13	-1.06	0.01 KWD	0.81	0.00
Utilities	526.32	0.00	-0.50	0.00	-3.38	-12.28	0.22 KWD	2.51	15.42



What Move the GCC markets

Oil Prices

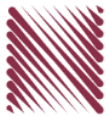
Oil prices fell in early Asian trade on Thursday as traders anticipated more supply of crude entering the market coupled with weaker demand. U.S. crude oil stocks rose by 5.5 million barrels in the most recent week, the U.S. Energy Information Administration said, more than the expected increase of 73,000 barrels. Brent crude futures fell by 53 cents, or 0.5%, to \$96.87 a barrel.

Kuwait Market

The market closed down today by -0.33% at 7,690.07 value traded 46 million KD, Premier market value traded reached 28.9 million KD and closed at 8,573.85 down by -0.24%.

Saudi Market

The Market closed up today by +0.82%, Most GCC Markets closed up as oil prices are relatively stable. And listed companies start declaration their positive semiannual financial performance.

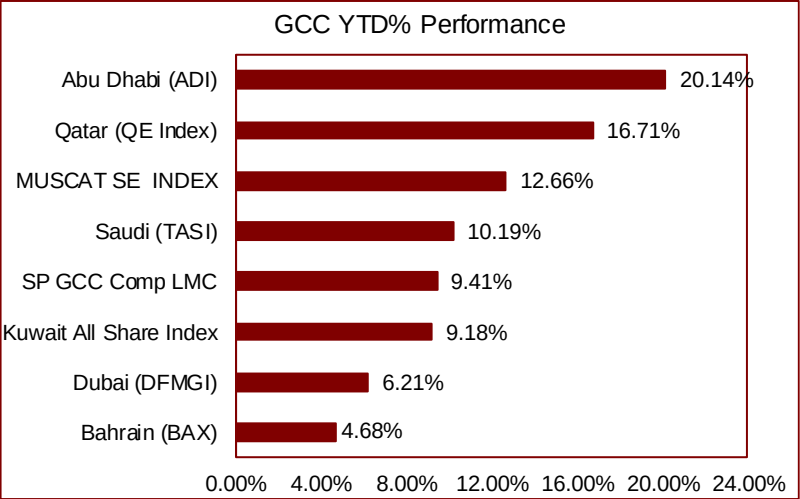


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.065	0.38	-0.28	-0.09	2.11	12.16	8.03 KWD	2.07	27.00
KFH	0.869	-0.57	-1.59	-1.59	-0.23	14.89	8.06 KWD	3.72	32.00
Zain	0.615	0.33	0.33	1.65	3.54	3.36	2.66 KWD	2.24	13.48
BOUBYAN BANK	0.833	0.00	-0.12	0.60	7.76	16.94	3.11 KWD	3.36	34.00
Agility	0.889	-0.22	-0.45	0.00	9.35	12.89	2.38 KWD	1.24	2.76
Saudi Arabia									
ARAMCO	39.85	0.13	0.38	0.25	2.71	22.44	8,767.00 SAR	7.32	19.64
SABIC	103.60	0.78	3.60	2.78	1.97	-10.69	310.80 SAR	1.66	35.00
STC	103.20	0.98	0.58	2.38	6.28	-8.19	206.40 SAR	2.87	17.89
AL-RAJHI BANK	87.40	1.75	-0.11	-1.69	5.94	-1.38	349.60 SAR	4.27	23.46
NCB	74.00	0.68	3.50	6.17	12.29	14.91	331.37 SAR	2.04	18.67
United Arab Emirates									
ETISALAT.AD	28.08	-1.40	-0.07	0.65	7.59	-11.42	244.21 AED	5.18	26.08
FAB.AD	20.00	0.00	2.67	2.99	6.50	7.40	220.95 AED	1.98	14.87
EMIRATES NBD	13.75	0.00	0.73	-0.36	4.17	1.48	86.85 AED	1.02	9.33
DB ISLAMIC BK	5.97	-0.17	2.93	1.53	3.65	10.97	43.23 AED	1.10	9.03
EMAAR PROPERT	5.69	1.79	5.76	3.45	9.42	16.36	46.54 AED	0.73	7.67
Qatar									
QNB	21.80	1.87	2.59	6.29	9.11	7.97	202.89 QAR	1.98	16.17
INDUSTRIES QAT	17.29	0.76	2.01	-0.80	8.40	11.62	105.40 QAR	2.69	10.48
QA ISLAMIC BK	26.75	0.38	2.88	1.63	20.22	45.94	63.69 QAR	2.50	17.66
MASRAF AL RAYA	4.59	-0.24	0.44	0.37	11.14	-1.08	43.01 QAR	1.79	22.96
MESAIEED PETRO	2.75	0.84	1.59	-1.29	10.60	31.77	34.86 QAR	2.15	17.96
OMAN									
BANK MUSCAT	0.616	0.65	-0.65	2.67	16.67	33.64	2.31 OMR	1.09	8.33
OMANTEL	0.932	4.95	-0.85	2.19	6.88	23.94	0.70 OMR	1.21	7.69
BANK DHOFAR	0.140	0.00	4.48	7.69	19.66	11.11	0.42 QAR	0.60	14.93
NAT BANK OF OMAN	0.280	0.00	2.94	14.75	33.33	42.13	0.46 QAR	0.80	12.71
OMINVEST	0.332	0.00	-2.92	-2.92	8.50	8.50	0.22 QAR	0.74	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
27-July- 22	23.45%	16.11%	0.06%	1.19%	0.41%	6.22%	17.51%	11.28%	5.73%	3.98%
03-August 22	23.65%	16.37%	0.06%	1.21%	0.41%	6.20%	17.53%	11.28%	5.74%	3.98%

End of Report
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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is down today by -0.33 %The leading sector bottom performance indices today are Consumer Disc -3.61 % Consumer services -0.89 % Financial services -0.73 % respectively

KSA
Saudi Armco has a positive performance today by + 0.13 %, SABIC have positive performance today by + 0.77 %. STC has a positive performance today by + 0.98 %, Al Rajhi Bank has a positive performance today by + 1.75 %

UAE
ETISALAT .AD have negative performance today by -1.4 %, FAB.AD flat performance today 0 %



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