

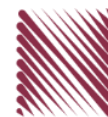


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, August 11th , 2022



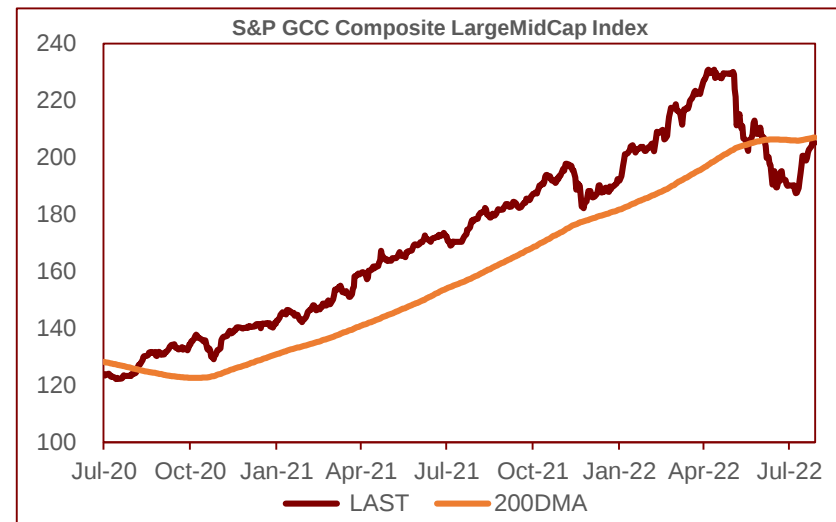


Market Watch

Thursday, August 11, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,530.76	0.80	1.95	2.72	8.74	11.07	12,163 SAR	2.13	18.91
Qatar (QE Index)	13,743.90	1.29	2.75	2.80	12.74	18.22	684 QAR	1.64	15.58
Dubai (DFMGI)	3,395.01	-0.25	1.96	1.43	5.04	5.94	461 AED	1.32	20.94
Abu Dhabi (ADI)	10,245.78	0.98	4.89	6.57	9.85	21.33	1,435 AED	2.17	19.94
Bahrain (BAX)	1,897.70	0.87	-0.14	-0.41	3.16	5.59	20 BHD	1.19	11.67
MUSCAT SE INDEX	4,621.81	-0.66	-0.97	1.98	12.11	11.92	5 OMR	0.97	13.25
SP GCC Comp LMC	209.30	0.82	2.10	2.51	8.72	10.30			
SP UAE PRICE INDEX	151.80	1.07	2.85	2.57	7.40	2.94			
Developed Markets									
MSCI World Index	2,834.51	-0.04	1.47	2.03	10.06	-13.29			
U.S. (S&P 500)	4,280.15	-0.07	1.33	1.86	11.15	-11.73			
U.K. (FTSE 100)	7,500.89	-0.55	0.24	0.57	4.14	1.10			
Japan (Topix)	1,973.18	0.00	0.15	-0.34	3.36	-2.95			
Emerging Markets									
MSCI EM Index	1,016.83	1.71	1.98	2.06	1.36	-17.67			
China (SSE Composite)	3,276.89	1.60	2.90	0.87	-3.44	-9.84			
India (Sensex)	59,462.78	0.88	1.77	3.06	11.91	1.85			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,699.47	0.12	-0.43	-0.23	3.93	9.32	45.92 KWD	2.32	21.73
Kuwait Premier Index	8,584.83	0.13	-0.49	-0.21	4.14	12.38	35.33 KWD	2.47	23.09
Kuwait Main Index	5,858.95	0.10	-0.22	-0.28	3.14	-0.46	10.58 KWD	1.80	17.18
NIC 50	9,655.89	0.13	-0.50	-0.22	4.13	13.30	28.60 KWD	2.45	22.09
Kuwait Sector									
Banking	1,845.28	0.09	-0.73	-0.66	3.62	13.71	27.51 KWD	1.34	24.09
Telecom	1,256.34	0.27	0.00	0.97	3.84	15.33	3.85 KWD	0.97	13.52
Industrials	1,250.52	-0.32	-0.49	-0.01	7.43	9.55	4.46 KWD	0.87	10.76
Financial services	1,439.29	0.33	0.28	0.09	4.92	1.12	3.74 KWD	0.81	14.33
Real estate	1,255.98	0.28	0.60	0.05	4.21	-5.31	2.71 KWD	0.63	33.11
Basic materials	1,018.51	0.05	0.43	1.20	0.56	-0.61	0.91 KWD	1.36	12.69
Health care	438.05	-4.40	-5.03	-5.21	-7.99	-45.04	0.22 KWD	2.53	10.37
Consumer services	537.69	0.65	-1.32	-0.94	1.95	-26.46	0.80 KWD	0.96	38.92
Insurance	1,565.63	2.02	2.54	3.63	1.49	2.10	0.65 KWD	0.79	8.25
Consumer Disc	1,539.21	0.78	-1.69	0.72	3.39	15.16	0.16 KWD	1.01	10.43
Energy	1,193.41	0.59	3.54	4.04	2.16	-16.44	0.25 KWD	0.83	14.26
Technology	672.94	-0.54	2.44	-5.61	-3.65	-1.60	0.01 KWD	0.81	0.00
Utilities	528.95	0.50	0.00	0.50	-2.90	-11.84	0.22 KWD	2.53	15.50



What Move the GCC markets

Oil Prices

Oil prices plunged around 2% on Friday, on expectations that supply disruptions in the U.S. Gulf of Mexico would be short-term, while recession fears clouded the demand outlook. Brent crude futures fell \$1.47, or 1.5%, to \$98.13 a barrel.

Kuwait Market

The market closed up today by 0.12% at 7,699.47 value traded 66.2 million KD, Premier market value traded reached 49.7 million KD and closed at 8,584.83 up by +0.13%.

Saudi Market

The Market closed up today by +0.80%, Most GCC Markets closed up as oil prices are relatively stable. And listed companies start declaration their positive semiannual financial performance.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



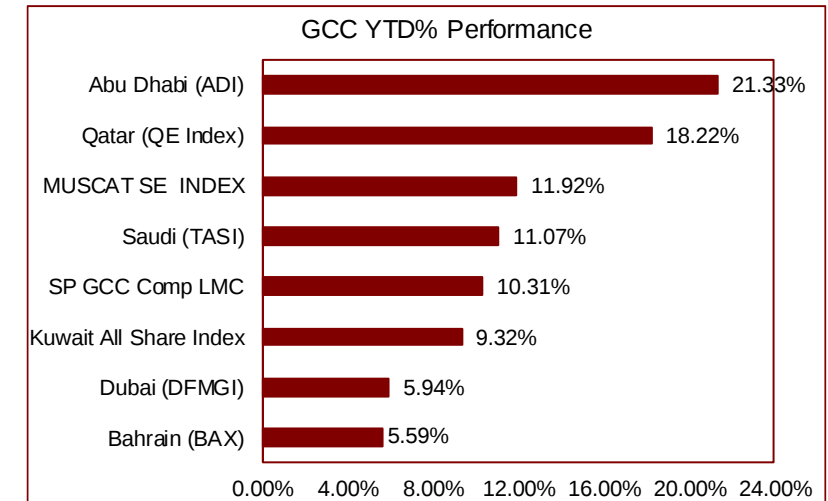
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.073	0.75	0.47	0.66	2.88	13.00	8.10 KWD	2.08	27.00
KFH	0.860	-1.04	-2.60	-2.60	-1.26	13.70	7.98 KWD	3.68	32.00
Zain	0.617	0.33	0.65	1.98	3.87	3.70	2.67 KWD	2.25	13.52
BOUBYAN BANK	0.835	0.24	0.12	0.85	8.02	17.22	3.12 KWD	3.37	34.00
Agility	0.889	0.00	-0.45	0.00	9.35	12.89	2.38 KWD	1.24	2.76
Saudi Arabia									
ARAMCO	40.80	2.38	2.77	2.64	5.15	25.36	8,968.84 SAR	7.49	19.66
SABIC	103.80	0.19	3.80	2.98	2.17	-10.52	311.15 SAR	1.66	35.00
STC	103.80	0.58	1.17	2.98	6.90	-7.65	207.43 SAR	2.89	18.06
AL-RAJHI BANK	87.90	0.57	0.46	-1.12	6.55	-0.82	351.32 SAR	4.29	23.87
NCB	73.00	-1.35	2.10	4.73	10.77	13.35	326.63 SAR	2.01	18.79
United Arab Emirates									
ETISALAT.AD	28.20	0.43	0.36	1.08	8.05	-11.04	244.03 AED	5.18	26.19
FAB.AD	20.66	3.30	6.06	6.39	10.01	10.94	226.48 AED	2.03	15.36
EMIRATES NBD	13.80	0.36	1.10	0.00	4.55	1.85	87.80 AED	1.03	9.36
DB ISLAMIC BK	5.91	-1.01	1.90	0.51	2.60	9.85	43.08 AED	1.09	8.94
EMAAR PROPERT	5.70	0.18	5.95	3.64	9.62	16.56	45.89 AED	0.72	7.69
Qatar									
QNB	22.16	1.65	4.28	8.04	10.91	9.76	203.13 QAR	2.02	16.44
INDUSTRIES QAT	17.55	1.50	3.54	0.69	10.03	13.30	105.38 QAR	2.73	10.64
QA ISLAMIC BK	27.00	0.93	3.85	2.58	21.35	47.30	63.32 QAR	2.53	17.83
MASRAF AL RAYA	4.65	1.31	1.75	1.68	12.59	0.22	42.92 QAR	1.81	23.26
MESAIEED PETRO	2.74	-0.54	1.03	-1.83	10.00	31.05	34.41 QAR	2.06	17.29
OMAN									
BANK MUSCAT	0.612	-0.65	-1.29	2.00	15.91	32.77	2.30 OMR	1.08	8.33
OMANTEL	0.924	4.05	-1.70	1.32	5.96	22.87	0.69 OMR	1.20	7.69
BANK DHOFAR	0.134	-4.29	0.00	3.08	14.53	6.35	0.40 QAR	0.57	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	0.338	1.81	-1.17	-1.17	10.46	10.46	0.23 QAR	0.75	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
03-August 22	23.65%	16.37%	0.06%	1.21%	0.41%	6.20%	17.53%	11.28%	5.74%	3.98%
10-August 22	23.70%	16.38%	0.06%	1.22%	0.41%	6.20%	17.53%	11.33%	5.75%	3.98%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.12 %The leading sector best performance indices today are Insurance 2.02 % Consumer Disc 0.78 % Consumer services 0.65 % respectively.

KSA

Saudi Armco has a positive performance today by + 2.38 %, SABIC have positive performance today by + 0.19%. STC has a positive performance today by + 0.58 %, Al Rajhi Bank has a positive performance today by + 0.57 %.

UAE

ETISALAT .AD has a positive performance today by + 0.43 %, FAB.AD has a positive performance today by + 3.3 %



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