

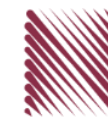


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, September 13th 2022

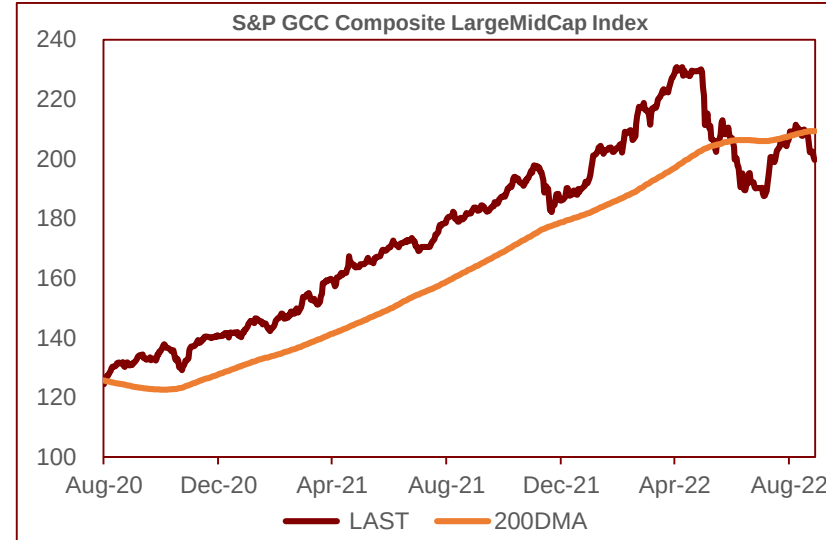




Market Watch

Tuesday, September 13, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,084.45	0.52	2.11	-1.62	4.87	7.12	11,292 SAR	2.06	17.84
Qatar (QE Index)	13,314.96	0.91	2.83	-0.82	9.22	14.53	667 QAR	1.56	15.11
Dubai (DFMGI)	3,457.63	1.64	2.93	0.42	7.27	8.19	465 AED	1.41	13.93
Abu Dhabi (ADI)	9,986.06	0.56	2.05	1.13	6.52	17.64	1,435 AED	2.10	27.05
Bahrain (BAX)	1,938.72	0.47	0.55	1.08	5.39	7.87	20 BHD	1.76	11.60
MUSCAT SE INDEX	4,497.83	-0.31	-0.33	-1.91	9.10	8.92	5 OMR	0.96	13.25
SP GCC Comp LMC	202.01	0.75	2.44	-1.51	4.94	6.47			
SP UAE PRICE INDEX	144.08	1.09	2.89	-1.33	1.93	-2.30			
Developed Markets									
MSCI World Index	2,619.50	-3.66	-0.63	-0.30	2.88	-18.94			
U.S. (S&P 500)	3,932.69	-4.32	-1.83	-0.56	3.89	-17.49			
U.K. (FTSE 100)	7,385.86	-1.17	1.70	1.40	3.02	0.02			
Japan (Topix)	1,986.57	0.32	1.48	1.19	6.19	-0.29			
Emerging Markets									
MSCI EM Index	979.91	0.09	2.37	-1.43	-2.07	-20.46			
China (SSE Composite)	3,263.80	0.05	0.87	1.93	-3.97	-10.33			
India (Sensex)	60,571.08	0.76	1.48	1.74	14.24	3.98			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,607.43	0.65	0.69	-1.32	2.68	8.01	45.36 KWD	2.33	22.19
Kuwait Premier Index	8,488.75	0.82	0.81	-1.23	2.98	11.12	35.00 KWD	2.50	23.62
Kuwait Main Index	5,772.47	0.01	0.26	-1.64	1.62	-1.93	10.36 KWD	1.76	17.35
NIC 50	9,561.96	0.74	0.80	-1.24	2.97	12.20	28.60 KWD	2.48	22.62
Kuwait Sector									
Banking	1,837.06	0.86	0.72	-1.27	3.16	13.21	27.43 KWD	1.36	24.62
Telecom	1,229.55	0.53	1.25	-1.63	1.63	12.87	3.77 KWD	1.02	13.13
Industrials	1,177.57	0.21	0.46	-2.96	1.16	3.16	4.16 KWD	0.83	12.11
Financial services	1,416.63	0.62	1.13	-0.72	3.27	-0.47	3.70 KWD	0.76	14.13
Real estate	1,276.91	0.48	1.11	0.74	5.95	-3.73	2.75 KWD	0.66	28.26
Basic materials	998.37	0.12	-0.37	-1.13	-1.43	-2.58	0.89 KWD	1.35	11.11
Health care	420.41	0.00	0.00	-2.80	-11.69	-47.25	0.21 KWD	2.28	10.26
Consumer services	517.10	-0.33	-0.46	-3.21	-1.95	-29.27	0.77 KWD	0.97	11.07
Insurance	1,576.68	-0.14	-0.55	0.10	2.21	2.82	0.66 KWD	0.82	8.02
Consumer Disc	1,486.86	-1.21	-1.77	-2.64	-0.13	11.24	0.16 KWD	1.02	21.15
Energy	1,144.14	1.79	1.60	-4.65	-2.06	-19.89	0.24 KWD	0.82	12.49
Technology	632.92	3.57	-1.14	4.19	-9.38	-7.45	0.01 KWD	0.77	0.00
Utilities	534.21	0.00	-0.98	0.99	-1.93	-10.97	0.22 KWD	2.28	15.54



What Move the GCC markets

Oil Prices

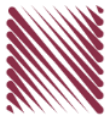
Oil prices rose in volatile trade on Tuesday as worries about tight fuel supplies ahead of winter offset investor concerns about lower demand in China, the world's biggest crude importer, and further increases in U.S. and European interest rates. Brent crude had risen \$1.16, or 1.2%, to \$95.16 a barrel.

Kuwait Market

The market closed up today by + 0.65% at 7,607.43 value traded 43.3 million KD, Premier market value traded reached 27.4 million KD and closed at 8,488.75 up by + 0.82%.

Saudi Market

The Market closed up today by 0.52%, KSA Market closed up as oil prices are relatively stable listed companies start declaration their positive semiannual financial performance.

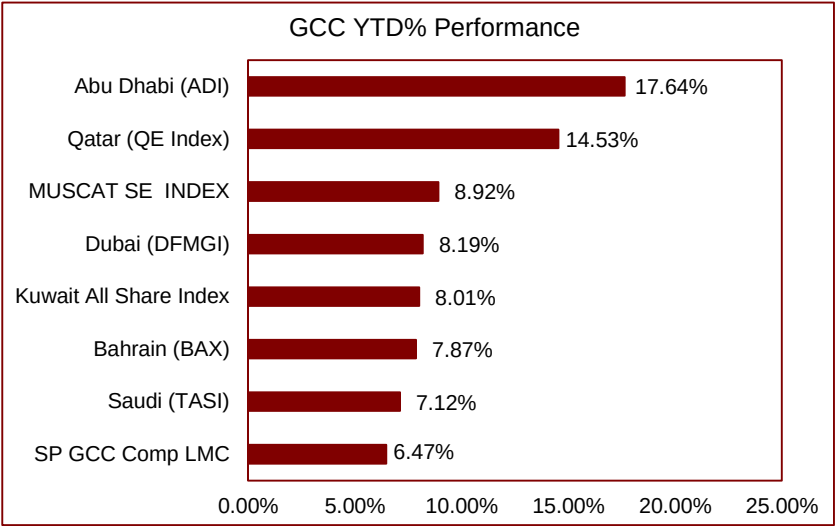


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.040	0.68	0.97	-1.33	-0.29	9.53	7.86 KWD	2.02	27.00
KFH	0.892	2.18	0.90	-0.89	2.41	17.93	8.29 KWD	3.82	32.00
Zain	0.599	0.84	1.87	-0.99	0.84	0.67	2.59 KWD	2.18	13.13
BOUBYAN BANK	0.822	0.98	1.73	-1.56	6.34	15.39	3.07 KWD	3.32	34.00
Agility	0.810	0.37	0.37	-3.80	-0.37	2.86	2.17 KWD	1.38	2.56
Saudi Arabia									
ARAMCO	37.20	-0.13	1.78	-0.80	-4.12	14.30	8,184.44 SAR	6.29	15.50
SABIC	97.50	0.72	-0.31	-2.69	-4.04	-15.95	292.52 SAR	1.62	35.00
STC	40.20	0.75	1.01	-3.83	3.50	-10.59	201.01 SAR	2.80	17.46
AL-RAJHI BANK	90.50	2.03	5.60	0.33	9.70	2.12	362.02 SAR	4.42	24.22
NCB	67.00	-1.33	1.21	-4.15	1.67	4.04	300.04 SAR	1.85	17.25
United Arab Emirates									
ETISALAT.AD	24.60	0.82	5.31	-4.35	-5.75	-22.40	213.93 AED	4.54	22.85
FAB.AD	19.00	1.60	3.26	-0.52	1.17	2.03	209.89 AED	1.88	14.13
EMIRATES NBD	13.25	1.92	2.32	-0.75	0.38	-2.21	83.69 AED	0.98	8.99
DB ISLAMIC BK	5.98	2.22	3.46	2.22	3.82	11.15	43.30 AED	1.10	9.04
EMAAR PROPERT	6.30	2.27	4.65	0.64	21.15	28.83	51.53 AED	0.81	6.98
Qatar									
QNB	20.97	3.30	7.54	1.60	4.95	3.86	193.69 QAR	1.91	15.55
INDUSTRIES QAT	17.87	-0.28	0.34	-1.54	12.04	15.36	108.11 QAR	2.78	10.83
QA ISLAMIC BK	25.98	3.30	6.04	1.44	16.76	41.73	61.39 QAR	2.43	17.15
MASRAF AL RAYA	4.36	0.00	1.30	-3.56	5.57	-6.03	40.55 QAR	1.70	21.81
MESAIEED PETRO	2.50	0.00	2.88	-3.85	0.40	19.62	31.41 QAR	1.88	15.78
OMAN									
BANK MUSCAT	0.580	-1.02	-2.03	-3.97	9.85	25.83	2.18 OMR	1.02	8.33
OMANTEL	0.900	1.35	-3.02	-2.17	3.21	19.68	0.68 OMR	1.17	7.69
BANK DHOFAR	0.135	0.00	3.85	0.00	15.38	7.14	0.40 QAR	0.58	14.93
NAT BANK OF OMAN	0.260	0.00	0.00	-3.70	23.81	31.98	0.42 QAR	0.75	12.71
OMINVEST	0.328	-0.61	-0.61	-1.20	7.19	7.19	0.22 QAR	0.72	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
31-August 22	23.78%	16.45%	0.06%	1.23%	0.39%	5.85%	17.68%	11.36%	5.77%	4.01%
7-September 22	23.72%	16.43%	0.06%	1.24%	0.38%	5.83%	17.70%	11.37%	5.71%	4.04%

End of Report
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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is up today by + 0.65 %The leading sector best performance indices today are Technology 3.57 % Energy 1.79 % Banking 0.86 % respectively

KSA
Saudi Armco has a negative performance today by -0.13 %, SABIC has a positive performance today by + 0.72 %, STC has a positive performance today by + 0.75 %, Al Rajhi Bank has a positive performance today by + 2.03 %

UAE
ETISALAT .AD has a positive performance today by + 0.82 %, FAB.AD has a positive performance today by + 1.6 %



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