

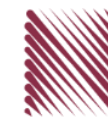


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, August 15th , 2022



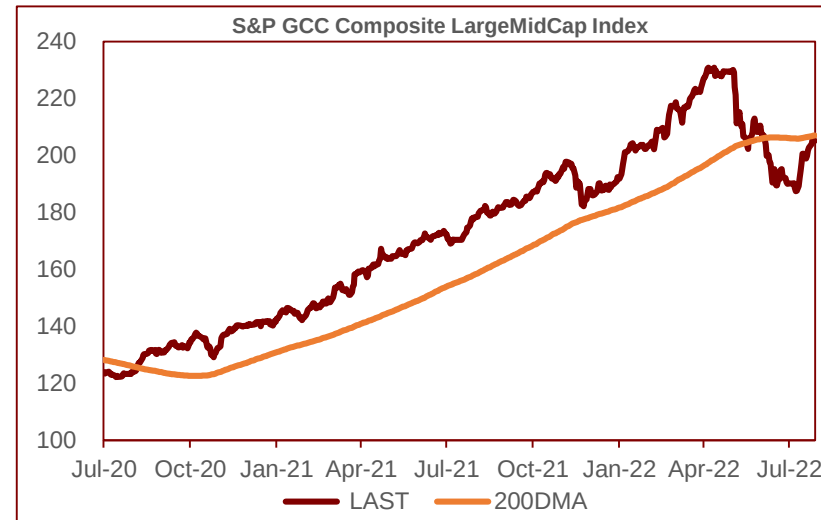


Market Watch

Monday, August 15, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	12,543.77	0.23	0.10	2.83	8.86	11.19	12,098 SAR	2.13	19.22
Qatar (QE Index)	13,699.63	-0.70	-0.32	2.47	12.37	17.84	690 QAR	1.63	15.29
Dubai (DFMGI)	3,397.32	0.07	0.35	1.78	5.40	6.30	460 AED	1.34	21.11
Abu Dhabi (ADI)	10,199.81	-0.45	-0.96	5.55	8.80	20.16	1,435 AED	2.15	26.37
Bahrain (BAX)	1,902.06	-0.53	0.23	-0.18	3.39	5.83	20 BHD	1.19	11.77
MUSCAT SE INDEX	4,643.93	0.38	0.48	2.47	12.65	12.46	5 OMR	0.98	13.25
SP GCC Comp LMC	209.29	0.07	-0.01	2.51	8.72	10.29			
SP UAE PRICE INDEX	151.40	-0.26	-0.26	2.31	7.12	2.67			
Developed Markets									
MSCI World Index	2,842.48	0.28	1.44	3.50	11.64	-12.04			
U.S. (S&P 500)	4,297.14	0.40	2.14	4.04	13.52	-9.84			
U.K. (FTSE 100)	7,509.15	0.11	0.58	1.15	4.74	1.69			
Japan (Topix)	1,984.96	0.60	2.65	2.30	6.10	-0.37			
Emerging Markets									
MSCI EM Index	1,015.00	-0.18	0.07	2.14	1.43	-17.61			
China (SSE Composite)	3,276.09	-0.02	-0.17	0.70	-3.61	-9.99			
India (Sensex)	59,462.78	0.00	0.22	3.29	12.15	2.08			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,632.94	-0.18	-0.86	-1.09	3.03	8.37	45.64 KWD	2.33	21.62
Kuwait Premier Index	8,513.97	-0.13	-0.83	-1.04	3.29	11.45	35.13 KWD	2.48	22.98
Kuwait Main Index	5,800.01	-0.34	-1.01	-1.28	2.10	-1.47	10.51 KWD	1.81	17.09
NIC 50	9,562.10	-0.25	-0.84	-1.05	3.28	12.20	28.60 KWD	2.46	21.98
Kuwait Sector									
Banking	1,833.83	-0.05	-0.62	-1.27	2.98	13.01	27.43 KWD	1.33	23.98
Telecom	1,256.57	0.66	0.02	0.99	3.86	15.35	3.86 KWD	0.99	13.50
Industrials	1,217.69	-0.98	-2.63	-2.63	4.61	6.68	4.34 KWD	0.86	10.71
Financial services	1,421.87	-0.55	-1.21	-1.12	3.65	-0.10	3.72 KWD	0.78	13.88
Real estate	1,237.70	-0.79	-1.46	-1.41	2.70	-6.69	2.68 KWD	0.61	33.27
Basic materials	1,021.89	0.00	0.33	1.53	0.89	-0.28	0.91 KWD	1.35	12.71
Health care	424.74	0.07	-3.04	-8.09	-10.78	-46.71	0.21 KWD	2.41	10.39
Consumer services	523.32	-1.36	-2.67	-3.59	-0.77	-28.42	0.80 KWD	0.98	39.87
Insurance	1,536.34	-0.38	-1.87	1.69	-0.40	0.19	0.64 KWD	0.79	8.02
Consumer Disc	1,540.74	0.29	0.10	0.82	3.49	15.27	0.16 KWD	0.99	10.04
Energy	1,178.07	-1.05	-1.29	2.71	0.85	-17.51	0.25 KWD	0.84	14.21
Technology	626.38	-2.16	-6.92	-12.14	-10.31	-8.40	0.01 KWD	0.76	0.00
Utilities	523.68	-0.50	-1.00	-0.50	-3.87	-12.72	0.22 KWD	2.50	15.34



What Move the GCC markets

Oil Prices

Oil prices fell on Tuesday, extending losses from the previous session, after economic data from China, the world's largest crude importer, spurred fresh concerns about a potential global recession that could hit energy demand. Brent crude futures fell 90 cents, or 1%, to \$94.20 a barrel.

Kuwait Market

The market closed down today by -0.18% at 7,632.94 value traded 57.9 million KD, Premier market value traded reached 35.8 million KD and closed at 8,513.97 down by -0.13%.

Saudi Market

The Market closed up today by +0.23%, KSA Market closed up as oil prices are relatively stable. And listed companies start declaration their positive semiannual financial performance.

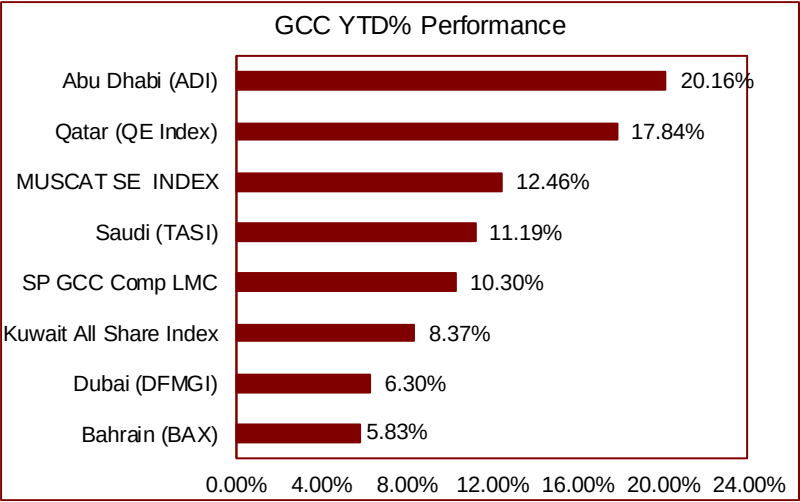


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.075	0.00	0.19	0.84	3.07	13.21	8.13 KWD	2.09	27.00
KFH	0.853	0.35	-0.81	-3.40	-2.07	12.78	7.93 KWD	3.65	32.00
Zain	0.616	0.65	-0.16	1.82	3.70	3.53	2.67 KWD	2.24	13.50
BOUBYAN BANK	0.831	-0.12	-0.48	0.36	7.50	16.65	3.11 KWD	3.35	34.00
Agility	0.846	-2.31	-4.84	-4.84	4.06	7.43	2.27 KWD	1.44	2.62
Saudi Arabia									
ARAMCO	40.45	0.00	-0.86	1.76	4.25	24.29	8,900.90 SAR	7.43	16.83
SABIC	105.00	0.77	1.16	4.17	3.35	-9.48	315.07 SAR	1.68	35.00
STC	104.40	0.19	0.58	3.57	7.52	-7.12	208.84 SAR	2.91	18.24
AL-RAJHI BANK	88.00	0.00	0.11	-1.01	6.67	-0.71	352.08 SAR	4.30	24.03
NCB	72.30	-0.69	-0.96	3.73	9.71	12.27	323.83 SAR	1.99	18.49
United Arab Emirates									
ETISALAT.AD	27.78	-1.00	-1.49	-0.43	6.44	-12.37	241.60 AED	5.13	25.80
FAB.AD	20.50	0.00	-0.77	5.56	9.16	10.08	226.48 AED	2.03	15.24
EMIRATES NBD	14.00	0.72	1.45	1.45	6.06	3.32	88.43 AED	1.04	9.50
DB ISLAMIC BK	5.95	0.00	0.68	1.19	3.30	10.59	43.08 AED	1.09	9.00
EMAAR PROPERT	5.67	1.07	-0.53	3.09	9.04	15.95	46.38 AED	0.73	6.28
Qatar									
QNB	22.20	0.00	0.18	8.24	11.11	9.96	206.04 QAR	2.02	16.47
INDUSTRIES QAT	17.79	-0.45	1.37	2.07	11.54	14.85	108.15 QAR	2.77	10.78
QA ISLAMIC BK	26.32	-2.05	-2.52	0.00	18.29	43.59	62.49 QAR	2.46	17.38
MASRAF AL RAYA	4.68	-0.55	0.58	2.27	13.24	0.80	43.71 QAR	1.82	23.40
MESAIEED PETRO	2.65	-2.29	-3.25	-5.02	6.43	26.79	33.45 QAR	1.99	16.73
OMAN									
BANK MUSCAT	0.616	0.65	0.65	2.67	16.67	33.64	2.31 OMR	1.09	8.33
OMANTEL	0.920	3.60	-0.43	0.88	5.50	22.34	0.69 OMR	1.19	7.69
BANK DHOFAR	0.136	0.74	1.49	4.62	16.24	7.94	0.41 QAR	0.58	14.93
NAT BANK OF OMAN	0.274	-2.14	-2.14	12.30	30.48	39.09	0.45 QAR	0.79	12.71
OMINVEST	0.338	0.00	0.00	-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 down today by -0.18 %The leading sector bottom performance indices today are Technology -2.16 % Consumer services -1.36 % Energy -1.05 % respectively

KSA
Saudi Armco flat performance today 0 %, SABIC have positive performance today by + 0.76%. STC has a positive performance today by + 0.19 %, Al Rajhi Bank flat performance today 0 %

UAE
ETISALAT .AD have negative performance today by -1 %, FAB.AD flat performance today 0 %.



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