



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, August 17th, 2022





Market Watch

Wednesday, August 17, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,646.74	0.81	0.93	3.67	9.75	12.10	12,001 SAR	2.21	19.05
Qatar (QE Index)	13,989.49	1.75	1.79	4.63	14.75	20.33	695 QAR	1.64	15.49
Dubai (DFMGI)	3,457.75	1.26	2.13	3.59	7.27	8.19	465 AED	1.36	13.95
Abu Dhabi (ADI)	10,251.65	0.67	-0.46	6.09	9.35	20.77	1,435 AED	2.15	28.43
Bahrain (BAX)	1,900.16	0.06	0.13	-0.28	3.29	5.73	20 BHD	1.12	11.64
MUSCAT SE INDEX	4,648.30	-0.08	0.57	2.56	12.75	12.56	5 OMR	0.98	13.25
SP GCC Comp LMC	211.50	0.94	1.05	3.59	9.87	11.47			
SP UAE PRICE INDEX	152.85	0.56	0.69	3.28	8.14	3.65			

Developed Markets

MSCI World Index	2,822.87	-0.76	0.74	2.79	10.87	-12.65			
U.S. (S&P 500)	4,274.04	-0.72	1.59	3.48	12.91	-10.33			
U.K. (FTSE 100)	7,515.75	-0.27	0.67	1.24	4.83	1.78			
Japan (Topix)	2,006.99	1.26	3.79	3.44	7.28	0.74			

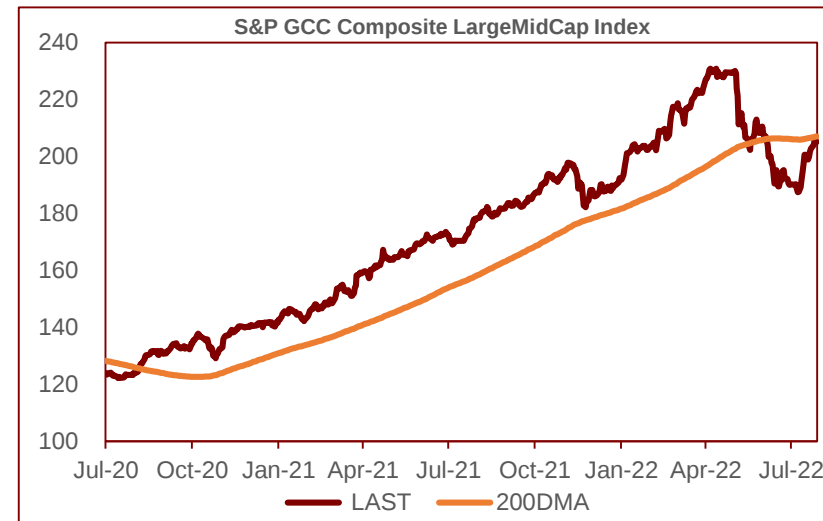
Emerging Markets

MSCI EM Index	1,015.59	0.13	0.13	2.19	1.49	-17.57			
China (SSE Composite)	3,292.53	0.45	0.33	1.21	-3.12	-9.54			
India (Sensex)	60,260.13	0.70	1.56	4.67	13.66	3.44			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,670.77	0.38	-0.37	-0.60	3.54	8.91	45.76 KWD	2.33	22.04
Kuwait Premier Index	8,563.02	0.41	-0.25	-0.47	3.88	12.09	35.27 KWD	2.49	23.48
Kuwait Main Index	5,811.66	0.25	-0.81	-1.08	2.30	-1.27	10.49 KWD	1.80	17.20
NIC 50	9,633.90	0.66	-0.26	-0.48	3.87	13.04	28.60 KWD	2.47	22.48

Kuwait Sector

Banking	1,842.47	0.32	-0.15	-0.81	3.46	13.54	27.49 KWD	1.34	24.48
Telecom	1,270.54	0.69	1.13	2.11	5.01	16.63	3.90 KWD	0.98	13.76
Industrials	1,222.17	0.27	-2.27	-2.27	4.99	7.07	4.35 KWD	0.86	12.17
Financial services	1,428.78	0.77	-0.73	-0.64	4.16	0.38	3.73 KWD	0.81	14.15
Real estate	1,247.46	0.77	-0.68	-0.63	3.51	-5.95	2.69 KWD	0.64	34.45
Basic materials	1,019.12	-0.19	0.06	1.26	0.62	-0.55	0.91 KWD	1.36	12.30
Health care	425.55	-2.65	-2.85	-7.92	-10.61	-46.61	0.21 KWD	2.30	11.28
Consumer services	515.06	0.34	-4.21	-5.11	-2.34	-29.55	0.80 KWD	1.00	11.14
Insurance	1,542.05	0.35	-1.51	2.07	-0.03	0.56	0.64 KWD	0.79	8.02
Consumer Disc	1,538.92	-0.44	-0.02	0.70	3.37	15.13	0.16 KWD	1.02	20.94
Energy	1,177.41	0.41	-1.34	2.65	0.79	-17.56	0.25 KWD	0.84	14.26
Technology	636.56	0.00	-5.41	-10.71	-8.85	-6.92	0.01 KWD	0.77	0.00
Utilities	526.32	1.01	-0.50	0.00	-3.38	-12.28	0.22 KWD	2.51	15.42



What Move the GCC markets

Oil Prices

Oil hit a six-month low on Wednesday after a brief rally as concerns about the prospect of a global recession that would weaken demand overshadowed a report showing lower U.S. crude and gasoline stocks. Brent crude fell as low as \$91.51, the lowest since February.

Kuwait Market

The market closed up today by +0.38% at 7,670.77 value traded 69.3 million KD, Premier market value traded reached 55.8 million KD and closed at 8,563.02 up by +0.41%.

Saudi Market

The Market closed up today by +0.81%, KSA Market closed up as oil prices are relatively stable. And listed companies start declaration their positive semiannual financial performance.

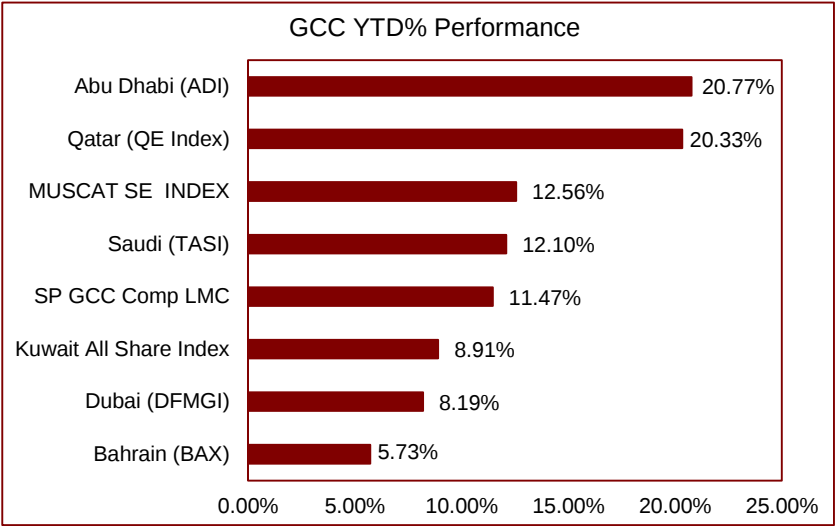


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.073	0.00	0.00	0.66	2.88	13.00	8.11 KWD	2.08	27.00
KFH	0.862	0.47	0.23	-2.38	-1.03	13.97	8.01 KWD	3.69	32.00
Zain	0.628	1.13	1.78	3.80	5.72	5.55	2.72 KWD	2.29	13.76
BOUBYAN BANK	0.835	0.24	0.00	0.85	8.02	17.22	3.12 KWD	3.37	34.00
Agility	0.851	0.12	-4.27	-4.27	4.67	8.06	2.28 KWD	1.45	2.69
Saudi Arabia									
ARAMCO	39.80	0.00	-2.45	0.13	2.58	22.29	8,756.23 SAR	6.72	16.56
SABIC	107.00	1.33	3.08	6.15	5.31	-7.76	321.01 SAR	1.78	35.00
STC	104.80	0.19	0.96	3.97	7.93	-6.76	209.61 SAR	2.92	18.31
AL-RAJHI BANK	89.40	1.59	1.71	0.56	8.36	0.87	357.61 SAR	4.37	24.03
NCB	72.80	0.14	-0.27	4.45	10.47	13.04	326.01 SAR	2.01	18.46
United Arab Emirates									
ETISALAT.AD	27.90	0.00	-1.06	0.00	6.90	-11.99	242.64 AED	5.15	25.91
FAB.AD	20.28	-0.88	-1.84	4.43	7.99	8.90	224.05 AED	2.01	15.08
EMIRATES NBD	13.90	0.00	0.72	0.72	5.30	2.58	87.80 AED	1.03	9.43
DB ISLAMIC BK	6.03	1.34	2.03	2.55	4.69	12.08	43.66 AED	1.11	9.12
EMAAR PROPERT	6.04	3.25	5.96	9.82	16.15	23.52	49.41 AED	0.78	6.69
Qatar									
QNB	22.72	3.13	2.53	10.78	13.71	12.53	208.16 QAR	2.07	16.85
INDUSTRIES QAT	18.04	0.22	2.79	3.50	13.10	16.46	108.26 QAR	2.81	10.93
QA ISLAMIC BK	27.50	3.77	1.85	4.48	23.60	50.03	64.46 QAR	2.57	18.16
MASRAF AL RAYA	4.79	1.76	3.08	4.81	16.05	3.30	44.22 QAR	1.87	23.98
MESAIEED PETRO	2.63	-0.23	-3.87	-5.63	5.74	25.98	32.81 QAR	1.98	16.62
OMAN									
BANK MUSCAT	0.616	0.00	0.65	2.67	16.67	33.64	2.31 OMR	1.09	8.33
OMANTEL	0.912	2.70	-1.30	0.00	4.59	21.28	0.68 OMR	1.18	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	0.274	0.00	-2.14	12.30	30.48	39.09	0.45 QAR	0.79	12.71
OMINVEST	0.328	-3.53	-2.96	-4.09	7.19	7.19	0.22 QAR	0.72	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
10-August 22	23.70%	16.38%	0.06%	1.22%	0.41%	6.20%	17.53%	11.33%	5.75%	3.98%
17-August 22	23.76%	16.36%	0.06%	1.24%	0.41%	6.00%	17.67%	11.34%	5.76%	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 + 0.38 %The leading sector best performance indices today are Utilities 1.01 % Real estate 0.77 % Financial services 0.77 % respectively

KSA
Saudi Armco flat performance today, SABIC has a positive performance today by + 1.33 %, STC has a positive performance today by + 0.19 %, Al Rajhi Bank has a positive performance today by + 1.59 %.

UAE
ETISALAT .AD has a flat performance today, FAB.AD has a negative performance today by -0.88 %



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