



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, August 18th, 2022





Market Watch

Thursday, August 18, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,621.73	-0.20	0.73	3.46	9.53	11.88	11,937 SAR	2.18	19.05
Qatar (QE Index)	14,018.43	0.21	2.00	4.85	14.99	20.58	710 QAR	1.64	15.64
Dubai (DFMGI)	3,419.72	-0.73	1.38	2.83	6.49	7.40	461 AED	1.38	14.38
Abu Dhabi (ADI)	10,083.09	-1.51	-1.95	4.49	7.71	18.95	1,435 AED	2.14	28.64
Bahrain (BAX)	1,897.73	-0.13	0.00	-0.41	3.16	5.59	20 BHD	1.13	11.61
MUSCAT SE INDEX	4,606.78	-0.89	-0.33	1.65	11.75	11.56	5 OMR	0.98	13.25
SP GCC Comp LMC	210.60	-0.33	0.72	3.25	9.50	11.10			
SP UAE PRICE INDEX	149.36	-1.85	-1.17	1.37	6.14	1.73			

Developed Markets

MSCI World Index	2,787.71	0.13	0.86	2.91	11.01	-12.54			
U.S. (S&P 500)	4,228.48	0.23	1.82	3.72	13.17	-10.12			
U.K. (FTSE 100)	7,550.37	0.35	1.02	1.60	5.20	2.13			
Japan (Topix)	1,994.52	-0.82	2.94	2.59	6.40	-0.09			

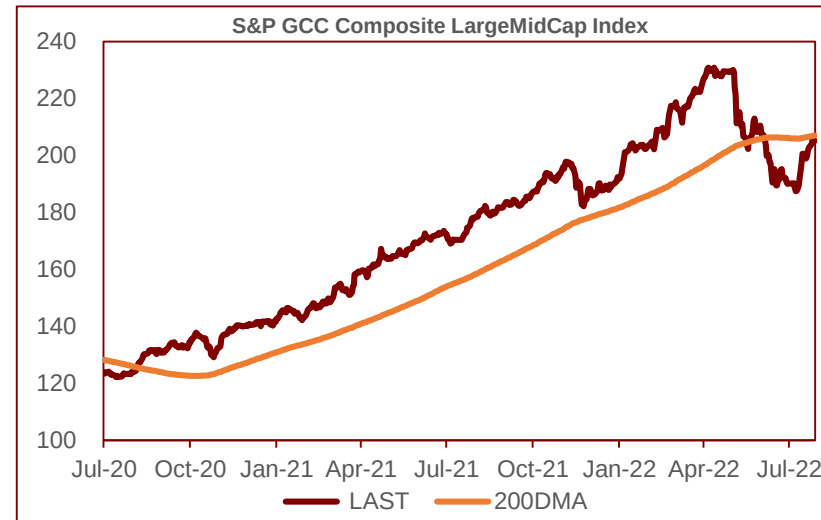
Emerging Markets

MSCI EM Index	1,001.46	-0.59	-0.46	1.59	0.89	-18.05			
China (SSE Composite)	3,258.08	-0.46	-0.13	0.75	-3.56	-9.95			
India (Sensex)	59,646.15	0.06	1.63	4.74	13.73	3.51			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,685.43	0.19	-0.18	-0.41	3.74	9.12	45.76 KWD	2.35	22.24
Kuwait Premier Index	8,580.05	0.20	-0.06	-0.27	4.09	12.32	35.30 KWD	2.51	23.61
Kuwait Main Index	5,821.11	0.16	-0.65	-0.92	2.47	-1.11	10.46 KWD	1.82	17.64
NIC 50	9,633.90	0.66	-0.07	-0.28	4.08	13.04	28.60 KWD	2.49	22.61

Kuwait Sector

Banking	1,848.90	0.35	0.20	-0.46	3.82	13.93	27.57 KWD	1.34	24.61
Telecom	1,263.28	-0.57	0.55	1.53	4.41	15.96	3.87 KWD	0.98	13.63
Industrials	1,224.37	0.18	-2.09	-2.10	5.18	7.26	4.32 KWD	0.86	12.30
Financial services	1,430.14	0.10	-0.64	-0.55	4.26	0.48	3.72 KWD	0.81	14.10
Real estate	1,247.55	0.01	-0.67	-0.63	3.51	-5.95	2.69 KWD	0.64	35.66
Basic materials	1,015.71	-0.33	-0.27	0.92	0.28	-0.89	0.91 KWD	1.35	12.27
Health care	437.14	2.72	-0.21	-5.41	-8.18	-45.15	0.22 KWD	2.31	11.28
Consumer services	519.19	0.80	-3.44	-4.35	-1.55	-28.99	0.81 KWD	1.00	11.36
Insurance	1,523.72	-1.19	-2.68	0.85	-1.22	-0.63	0.63 KWD	0.79	8.02
Consumer Disc	1,553.88	0.97	0.95	1.68	4.37	16.25	0.16 KWD	1.03	21.05
Energy	1,176.52	-0.08	-1.42	2.57	0.71	-17.62	0.24 KWD	0.84	12.31
Technology	638.74	0.34	-5.08	-10.41	-8.54	-6.60	0.01 KWD	0.77	0.00
Utilities	515.79	-2.00	-2.49	-2.00	-5.31	-14.04	0.22 KWD	2.21	15.01



What Move the GCC markets

Oil Prices

Oil prices eased on Thursday, reversing course from the previous session, as rising output from Russia and worries about a potential global recession weighed on futures, Brent crude futures fell 33 cents, or 0.4%, to \$93.32 a barrel.

Kuwait Market

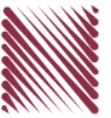
The market closed up today by +0.19% at 7,685.43 value traded 59.3 million KD, Premier market value traded reached 41.5 million KD and closed at 8,580.05 up by +0.20%.

Saudi Market

The Market closed down today by -0.20%, KSA Market 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



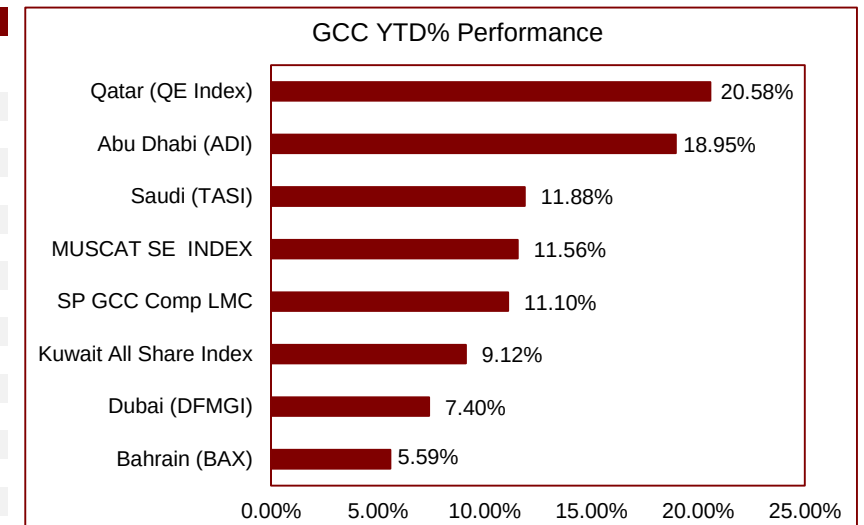
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.063	-0.93	-0.93	-0.28	1.92	11.95	8.02 KWD	2.06	27.00
KFH	0.882	2.32	2.56	-0.11	1.26	16.61	8.19 KWD	3.78	32.00
Zain	0.622	-0.96	0.81	2.81	4.71	4.54	2.69 KWD	2.27	13.63
BOUBYAN BANK	0.829	-0.72	-0.72	0.12	7.24	16.37	3.10 KWD	3.34	34.00
Agility	0.850	-0.12	-4.39	-4.39	4.55	7.94	2.27 KWD	1.45	2.69
Saudi Arabia									
ARAMCO	39.50	-0.75	-3.19	-0.63	1.80	21.37	8,693.24 SAR	6.67	16.56
SABIC	106.20	-0.75	2.31	5.36	4.53	-8.45	318.72 SAR	1.76	35.00
STC	105.60	0.76	1.73	4.76	8.75	-6.05	211.28 SAR	2.94	18.34
AL-RAJHI BANK	90.90	1.68	3.41	2.25	10.18	2.57	363.74 SAR	4.44	24.41
NCB	72.00	-1.10	-1.37	3.30	9.26	11.80	322.54 SAR	1.98	18.49
United Arab Emirates									
ETISALAT.AD	27.20	-2.51	-3.55	-2.51	4.21	-14.20	233.94 AED	4.96	25.26
FAB.AD	19.74	-2.66	-4.45	1.65	5.11	6.00	218.08 AED	1.96	14.68
EMIRATES NBD	13.85	-0.36	0.36	0.36	4.92	2.21	86.22 AED	1.01	9.39
DB ISLAMIC BK	5.94	-1.49	0.51	1.02	3.13	10.41	42.72 AED	1.09	8.98
EMAAR PROPERT	5.91	-2.15	3.68	7.45	13.65	20.86	48.34 AED	0.76	6.54
Qatar									
QNB	22.60	-0.53	1.99	10.19	13.11	11.94	210.70 QAR	2.06	16.76
INDUSTRIES QAT	18.00	-0.22	2.56	3.27	12.85	16.20	109.92 QAR	2.80	10.91
QA ISLAMIC BK	27.40	-0.36	1.48	4.10	23.15	49.48	65.35 QAR	2.56	18.09
MASRAF AL RAYA	4.81	0.35	3.44	5.18	16.46	3.66	45.15 QAR	1.87	24.06
MESAIEED PETRO	2.62	-0.46	-4.31	-6.06	5.26	25.41	33.24 QAR	1.97	16.55
OMAN									
BANK MUSCAT	0.616	0.00	0.65	2.67	16.67	33.64	2.31 OMR	1.09	8.33
OMANTEL	0.900	1.35	-2.60	-1.32	3.21	19.68	0.68 OMR	1.17	7.69
BANK DHOFAR	0.135	-3.57	0.75	3.85	15.38	7.14	0.40 QAR	0.58	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	0.330	0.61	-2.37	-3.51	7.84	7.84	0.22 QAR	0.73	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, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.19 %The leading sector best performance indices today are Health care 2.72 % Consumer Disc 0.97 % Consumer services 0.8 % respectively

KSA

Saudi Armco has a negative performance today by -0.75 %, SABIC has a negative performance today by -0.75 %, STC has a positive performance today by + 0.76 %, Al Rajhi Bank has a positive performance today by + 1.68 %

UAE

ETISALAT .AD has a negative performance today by -2.51 %, FAB.AD has a negative performance today by -2.66 %



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