



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Sunday, December 18<sup>th</sup> 2022





### Market Watch

Sunday, December 18, 2022

| Description              | Close     | Day Δ | WTD   | MTD   | QTD    | YTD    | M Cap (in Bn) | PBV  | PE    |
|--------------------------|-----------|-------|-------|-------|--------|--------|---------------|------|-------|
| <b>GCC Markets</b>       |           |       |       |       |        |        |               |      |       |
| Saudi (TASI)             | 10,251.68 | -0.38 | 0.05  | -5.92 | -10.11 | -9.13  | 9,527 SAR     | 1.60 | 15.00 |
| Qatar (QE Index)         | 10,976.75 | 0.00  | -4.46 | -7.96 | -13.54 | -5.58  | 554 QAR       | 1.32 | 13.03 |
| Dubai (DFMGI)            | 3,328.97  | 0.41  | 0.44  | 0.15  | -0.30  | 4.16   | 442 AED       | 1.21 | 13.11 |
| Abu Dhabi (ADI)          | 10,327.57 | 1.57  | 0.52  | -2.13 | 5.91   | 21.67  | 1,435 AED     | 2.00 | 19.25 |
| Bahrain (BAX)            | 1,854.03  | 0.00  | -0.08 | -0.58 | -1.49  | 3.16   | 19 BHD        | 1.80 | 15.26 |
| MUSCAT SE INDEX          | 4,793.73  | -1.29 | 0.20  | 3.90  | 5.86   | 16.08  | 5 OMR         | 0.99 | 13.25 |
| SP GCC Comp LMC          | 176.98    | 0.00  | -0.71 | -5.88 | -7.20  | -6.74  |               |      |       |
| SP UAE PRICE INDEX       | 139.72    | 2.04  | 0.47  | -3.45 | 0.72   | -5.25  |               |      |       |
| <b>Developed Markets</b> |           |       |       |       |        |        |               |      |       |
| MSCI World Index         | 2,606.01  | -1.17 | -2.41 | -4.22 | 9.56   | -19.36 |               |      |       |
| U.S. (S&P 500)           | 3,852.36  | -1.11 | -2.80 | -5.58 | 7.44   | -19.17 |               |      |       |
| U.K. (FTSE 100)          | 7,332.12  | -1.27 | -1.87 | -3.18 | 6.36   | -0.71  |               |      |       |
| Japan (Topix)            | 1,950.21  | -1.20 | 0.45  | -1.78 | 6.22   | -2.11  |               |      |       |
| <b>Emerging Markets</b>  |           |       |       |       |        |        |               |      |       |
| MSCI EM Index            | 957.30    | -0.30 | -1.23 | -1.54 | 9.31   | -22.30 |               |      |       |
| China (SSE Composite)    | 3,167.86  | -0.02 | -0.92 | 0.52  | 4.74   | -12.97 |               |      |       |
| India (Sensex)           | 61,337.81 | -0.75 | -1.97 | -2.79 | 6.81   | 5.29   |               |      |       |
| Description              | Close     | Day Δ | WTD   | MTD   | QTD    | YTD    | M Cap (in Bn) | PBV  | PE    |
| <b>Kuwait</b>            |           |       |       |       |        |        |               |      |       |
| Kuwait All Share Index   | 7,278.54  | -0.98 | -2.30 | -4.04 | 2.43   | 3.34   | 47.05 KWD     | 2.12 | 29.07 |
| Kuwait Premier Index     | 8,087.52  | -1.09 | -2.80 | -4.76 | 1.73   | 5.87   | 36.95 KWD     | 2.23 | 24.90 |
| Kuwait Main Index        | 5,622.36  | -0.55 | -0.27 | -1.04 | 5.32   | -4.48  | 10.10 KWD     | 1.68 | 44.41 |
| NIC 50                   | 9,051.92  | -1.14 | -2.81 | -4.77 | 1.72   | 6.21   | 28.60 KWD     | 2.21 | 23.90 |
| <b>Kuwait Sector</b>     |           |       |       |       |        |        |               |      |       |
| Banking                  | 1,793.18  | -0.87 | -1.85 | -3.84 | 2.86   | 10.50  | 30.18 KWD     | 1.36 | 25.90 |
| Telecom                  | 1,181.96  | -0.96 | -1.97 | -2.65 | 1.60   | 8.50   | 3.62 KWD      | 2.01 | 11.98 |
| Industrials              | 1,049.31  | -1.99 | -5.78 | -7.65 | 3.22   | -8.08  | 3.70 KWD      | 0.78 | 18.39 |
| Financial services       | 1,256.27  | -1.37 | -4.22 | -5.74 | 0.20   | -11.74 | 3.57 KWD      | 0.71 | 16.17 |
| Real estate              | 1,231.85  | -1.09 | -2.06 | -3.88 | 2.47   | -7.13  | 2.65 KWD      | 0.59 | 21.61 |
| Basic materials          | 872.11    | 0.64  | 0.20  | -1.09 | -3.25  | -14.90 | 0.77 KWD      | 1.28 | 8.45  |
| Health care              | 461.85    | -0.39 | 1.67  | 1.67  | 0.46   | -42.05 | 0.23 KWD      | 2.62 | 11.92 |
| Consumer services        | 484.81    | -0.84 | -5.29 | -0.78 | 3.74   | -33.69 | 0.76 KWD      | 0.91 | 11.33 |
| Insurance                | 1,529.59  | -0.79 | -1.14 | -0.92 | 1.89   | -0.25  | 0.63 KWD      | 0.79 | 9.33  |
| Consumer Disc            | 1,461.10  | -0.17 | 0.2   |       |        |        |               |      |       |



| Description          | Close | Day Δ | WTD    | MTD    | QTD    | YTD    | M Cap (in Bn) | PBV  | PE    |
|----------------------|-------|-------|--------|--------|--------|--------|---------------|------|-------|
| Blue Chip Watch      |       | %     | %      | %      | %      | %      |               |      |       |
| Kuwait               |       |       |        |        |        |        |               |      |       |
| NBK                  | 1.076 | -1.01 | -1.65  | -4.10  | 10.25  | 13.32  | 8.12 KWD      | 2.07 | 27.00 |
| KFH                  | 0.818 | -1.21 | -3.76  | -5.54  | -2.73  | 8.15   | 10.97 KWD     | 3.37 | 32.00 |
| Zain                 | 0.560 | -2.10 | -3.78  | -4.60  | -4.27  | -5.88  | 2.42 KWD      | 2.01 | 11.98 |
| BOUBYAN BANK         | 0.810 | -0.74 | -1.34  | -4.03  | 5.88   | 13.71  | 3.03 KWD      | 3.21 | 34.00 |
| Agility              | 0.699 | -2.51 | -8.03  | -11.18 | 4.64   | -11.24 | 1.87 KWD      | 1.29 | 45.69 |
| Saudi Arabia         |       |       |        |        |        |        |               |      |       |
| ARAMCO               | 30.85 | -0.64 | -1.75  | -7.91  | -13.95 | -5.21  | 6,787.00 SAR  | 4.89 | 11.87 |
| SABIC                | 82.10 | 0.74  | 0.74   | -1.08  | -7.55  | -29.22 | 246.30 SAR    | 1.35 | 35.00 |
| STC                  | 36.05 | -0.69 | -1.37  | -6.24  | -8.39  | -19.82 | 180.25 SAR    | 2.45 | 15.07 |
| AL-RAJHI BANK        | 73.50 | 0.14  | -2.00  | -8.70  | -9.59  | -17.07 | 294.00 SAR    | 3.41 | 19.30 |
| NCB                  | 49.15 | -0.61 | 4.80   | -4.38  | -22.11 | -23.68 | 220.09 SAR    | 1.34 | 11.92 |
| United Arab Emirates |       |       |        |        |        |        |               |      |       |
| ETISALAT.AD          | 24.00 | 3.00  | 0.84   | -6.98  | 2.74   | -24.29 | 208.72 AED    | 4.39 | 22.40 |
| FAB.AD               | 17.10 | 4.27  | 2.52   | -2.84  | -4.26  | -8.17  | 188.92 AED    | 1.68 | 13.59 |
| EMIRATES NBD         | 13.20 | 0.76  | 2.33   | -0.38  | 2.72   | -2.58  | 83.38 AED     | 0.94 | 7.88  |
| DB ISLAMIC BK        | 5.68  | 1.43  | 1.25   | 0.00   | -5.02  | 5.58   | 41.13 AED     | 1.01 | 8.29  |
| EMAAR PROPERT        | 5.84  | -0.17 | -4.11  | -3.95  | 0.86   | 19.43  | 47.77 AED     | 0.73 | 6.73  |
| Qatar                |       |       |        |        |        |        |               |      |       |
| QNB                  | 17.55 | 0.00  | -2.34  | -10.46 | -11.81 | -13.08 | 160.78 QAR    | 1.54 | 12.57 |
| INDUSTRIES QAT       | 13.20 | 0.00  | -8.46  | -11.35 | -21.89 | -14.78 | 79.21 QAR     | 1.97 | 8.41  |
| QA ISLAMIC BK        | 20.67 | 0.00  | -10.52 | -14.87 | -16.32 | 12.77  | 48.44 QAR     | 1.85 | 13.26 |
| MASRAF AL RAYA       | 3.19  | 0.00  | -6.95  | -9.92  | -22.65 | -31.31 | 29.40 QAR     | 1.22 | 19.94 |
| MESAIEED PETRO       | 2.21  | 0.00  | -0.36  | -5.15  | -5.96  | 5.74   | 27.54 QAR     | 1.62 | 14.66 |
| OMAN                 |       |       |        |        |        |        |               |      |       |
| BANK MUSCAT          | 0.290 | -1.02 | -1.69  | 3.57   | 1.05   | 25.83  | 2.17 OMR      | 1.00 | 8.33  |
| OMANTEL              | 0.928 | 4.50  | 2.20   | 6.42   | 5.45   | 23.40  | 0.69 OMR      | 1.18 | 7.69  |
| BANK DHOFAR          | 0.170 | -2.86 | 2.41   | 9.68   | 19.72  | 34.92  | 0.51 QAR      | 0.72 | 14.93 |
| NAT BANK OF OMAN     | 0.290 | -1.36 | -1.69  | 0.69   | 7.41   | 47.21  | 0.47 QAR      | 0.81 | 12.71 |
| OMINVEST             | 0.420 | 0.00  | 5.00   | 7.14   | 26.51  | 37.25  | 0.28 QAR      | 0.84 | 6.85  |

| Foreign Holding |        |        |       |       |         |       |        |        |       |       |
|-----------------|--------|--------|-------|-------|---------|-------|--------|--------|-------|-------|
| Date            | NBK    | GBK    | CBK   | ABK   | MUTAHED | KIB   | BURG   | KFH    | BOUB  | WARBA |
| 7-Dec 22        | 24.59% | 17.38% | 0.06% | 1.23% | 0.37%   | 4.57% | 17.75% | 11.92% | 5.95% | 4.99% |
| 14-Dec 22       | 24.69% | 17.29% | 0.06% | 1.23% | 0.37%   | 4.56% | 17.74% | 12.33% | 5.92% | 4.98% |



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NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | [www.nic.com.kw](http://www.nic.com.kw)