

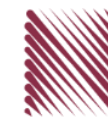


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, August 24th 2022





Market Watch

Wednesday, August 24, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,443.77	0.19	-1.41	2.01	7.99	10.30	11,812 SAR	2.08	18.74
Qatar (QE Index)	13,650.32	0.42	-2.63	2.10	11.97	17.41	690 QAR	1.64	15.62
Dubai (DFMGI)	3,421.69	0.85	-0.31	2.51	6.16	7.06	462 AED	1.40	14.02
Abu Dhabi (ADI)	10,002.05	-0.17	-0.94	3.50	6.69	17.83	1,435 AED	2.13	26.78
Bahrain (BAX)	1,900.85	0.01	0.16	-0.24	3.33	5.76	20 BHD	1.13	11.60
MUSCAT SE INDEX	4,551.89	-1.09	-1.19	0.44	10.41	10.23	5 OMR	0.97	13.25
SP GCC Comp LMC	207.70	-0.08	-1.47	1.73	7.89	9.47			
SP UAE PRICE INDEX	147.55	-0.05	-1.64	-0.29	4.39	0.06			

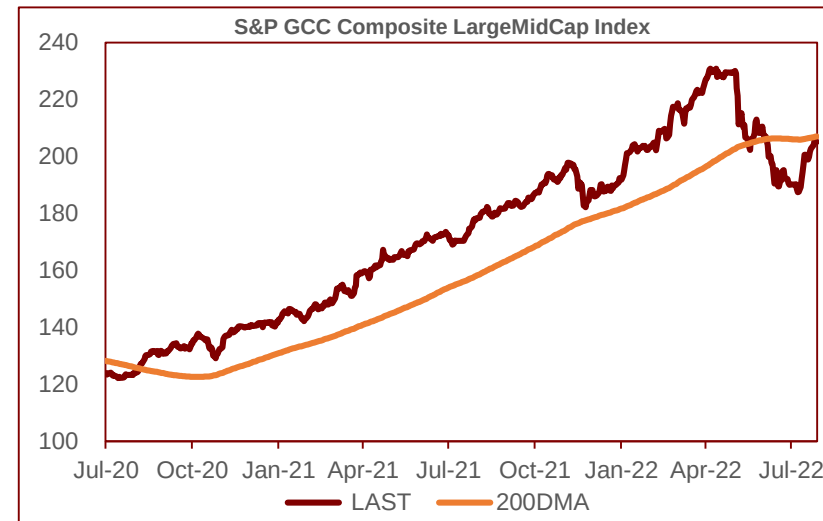
Developed Markets

MSCI World Index	2,736.01	0.21	-3.20	-0.38	7.46	-15.34			
U.S. (S&P 500)	4,140.77	0.29	-3.34	0.25	9.39	-13.12			
U.K. (FTSE 100)	7,471.51	-0.22	-0.93	0.65	4.22	1.18			
Japan (Topix)	1,967.18	-0.22	-1.17	1.38	5.15	-1.26			

Emerging Markets

MSCI EM Index	985.13	-0.45	-2.42	-0.87	-1.55	-20.04			
China (SSE Composite)	3,215.20	-1.86	-1.90	-1.17	-5.40	-11.66			
India (Sensex)	59,085.43	0.09	-2.01	2.63	11.44	1.43			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,807.87	-0.74	1.59	1.18	5.39	10.86	46.59 KWD	2.41	22.85
Kuwait Premier Index	8,741.14	-0.75	1.88	1.61	6.04	14.43	36.04 KWD	2.58	24.37
Kuwait Main Index	5,852.94	-0.71	0.55	-0.38	3.03	-0.57	10.55 KWD	1.83	17.65
NIC 50	9,812.53	-0.68	1.87	1.60	6.03	15.14	28.60 KWD	2.56	23.37
Kuwait Sector									
Banking	1,888.98	-0.77	2.17	1.70	6.07	16.40	28.21 KWD	1.36	25.37
Telecom	1,275.28	-1.10	0.95	2.49	5.41	17.07	3.92 KWD	1.05	13.65
Industrials	1,235.42	-0.69	0.90	-1.22	6.13	8.23	4.38 KWD	0.87	12.35
Financial services	1,432.37	-0.75	0.16	-0.39	4.42	0.64	3.73 KWD	0.81	14.70
Real estate	1,264.85	-0.01	1.39	0.75	4.95	-4.64	2.73 KWD	0.65	28.52
Basic materials	1,008.99	-1.30	-0.66	0.25	-0.38	-1.54	0.90 KWD	1.35	11.19
Health care	430.99	-1.41	-1.41	-6.74	-9.47	-45.93	0.21 KWD	2.28	11.02
Consumer services	527.43	0.66	1.59	-2.83	0.01	-27.86	0.81 KWD	0.99	11.33
Insurance	1,555.90	-0.24	2.11	2.98	0.86	1.47	0.65 KWD	0.80	8.02
Consumer Disc	1,559.88	-0.80	0.39	2.07	4.78	16.70	0.16 KWD	1.05	21.35
Energy	1,188.16	-0.98	0.99	3.58	1.71	-16.80	0.25 KWD	0.84	12.22
Technology	617.65	4.69	-3.30	-13.37	-11.56	-9.68	0.01 KWD	0.75	0.00
Utilities	521.05	0.00	1.02	-1.00	-4.35	-13.16	0.22 KWD	2.23	15.16



What Move the GCC markets

Oil Prices

Benchmark Brent oil climbed above \$100 a barrel on Wednesday after Saudi Arabia suggested this week that OPEC could consider cutting output in response to poor liquidity in the crude futures market and fears about a global economic downturn, Brent for October settlement reached a three-week high and was last up 92 cents at \$101.14 per barrel.

Kuwait Market

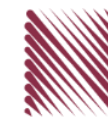
The market closed down today by -0.74% at 7,807.87 value traded 85.5 million KD, Premier market value traded reached 72.9 million KD and closed at 8,741.14 down by -0.75%.

Saudi Market

The Market closed up today by +0.19%, 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



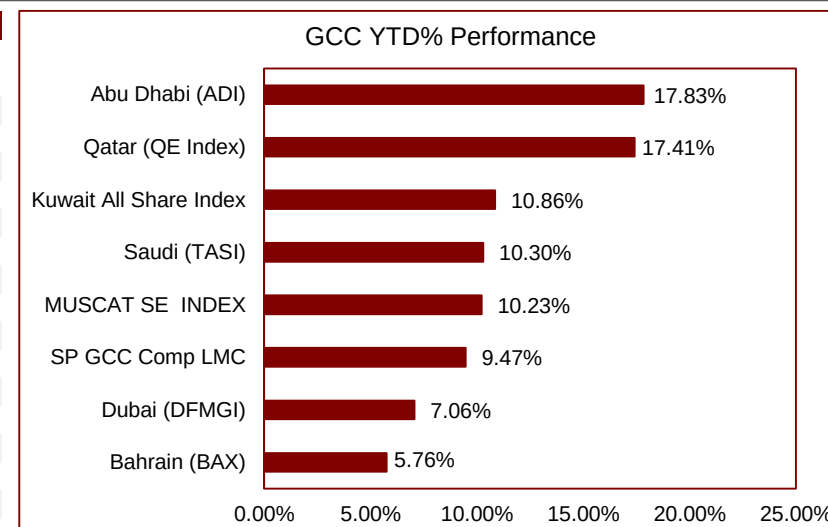
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.067	-0.28	0.38	0.09	2.30	12.37	8.07 KWD	2.07	27.00
KFH	0.920	-2.13	4.31	4.19	5.63	21.63	8.55 KWD	3.94	32.00
Zain	0.623	-0.48	0.16	2.98	4.88	4.71	2.70 KWD	2.27	13.65
BOUBYAN BANK	0.866	-0.46	4.46	4.59	12.03	21.57	3.24 KWD	3.49	34.00
Agility	0.867	-0.91	2.00	-2.47	6.64	10.10	2.32 KWD	1.48	2.74
Saudi Arabia									
ARAMCO	39.15	1.95	-0.89	-1.51	0.90	20.29	8,617.82 SAR	6.61	15.98
SABIC	101.80	0.79	-4.14	0.99	0.20	-12.24	305.57 SAR	1.69	35.00
STC	103.80	0.78	-1.70	2.98	6.90	-7.65	207.72 SAR	2.89	18.03
AL-RAJHI BANK	90.60	-0.33	-0.33	1.91	9.82	2.23	362.60 SAR	4.42	24.82
NCB	70.80	-0.42	-1.67	1.58	7.44	9.94	317.22 SAR	1.95	18.06
United Arab Emirates									
ETISALAT.AD	25.84	-1.52	-5.00	-7.38	-1.00	-18.49	224.73 AED	4.77	24.00
FAB.AD	19.74	0.00	0.00	1.65	5.11	6.00	218.08 AED	1.96	14.68
EMIRATES NBD	13.50	-0.74	-2.53	-2.17	2.27	-0.37	85.27 AED	1.00	9.16
DB ISLAMIC BK	5.88	1.03	-1.01	0.00	2.08	9.29	42.58 AED	1.08	8.89
EMAAR PROPERT	5.97	3.29	1.02	8.55	14.81	22.09	48.83 AED	0.77	6.61
Qatar									
QNB	21.10	-0.94	-6.64	2.88	5.61	4.51	196.81 QAR	1.92	15.65
INDUSTRIES QAT	18.00	1.41	0.00	3.27	12.85	16.20	109.97 QAR	2.80	10.91
QA ISLAMIC BK	26.30	0.73	-4.01	-0.08	18.20	43.48	62.76 QAR	2.46	17.36
MASRAF AL RAYA	4.61	0.35	-4.20	0.77	11.57	-0.69	43.28 QAR	1.79	23.05
MESAIEED PETRO	2.65	1.69	0.95	-5.16	6.27	26.60	33.57 QAR	1.99	16.70
OMAN									
BANK MUSCAT	0.604	-0.66	-1.95	0.67	14.39	31.03	2.28 OMR	1.07	8.33
OMANTEL	0.892	0.45	-0.89	-2.19	2.29	18.62	0.67 OMR	1.16	7.69
BANK DHOFAR	0.135	0.00	0.00	3.85	15.38	7.14	0.40 QAR	0.58	14.93
NAT BANK OF OMAN	0.270	-1.46	-1.46	10.66	28.57	37.06	0.44 QAR	0.78	12.71
OMINVEST	0.340	0.00	3.03	-0.58	11.11	11.11	0.23 QAR	0.75	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 down today by -0.74 %The leading sector bottom performance indices today are Health care -1.41 % Basic materials -1.3 % Telecom -1.1 % respectively

KSA

Saudi Armco has a positive performance today by + 1.95 %, SABIC has a positive performance today by + 0.79 %, STC has a positive performance today by + 0.78 %, Al Rajhi Bank has a negative performance today by -0.33 %

UAE

ETISALAT .AD has a negative performance today by -1.52 %, FAB.AD flat performance today



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