

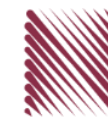


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, August 25th 2022

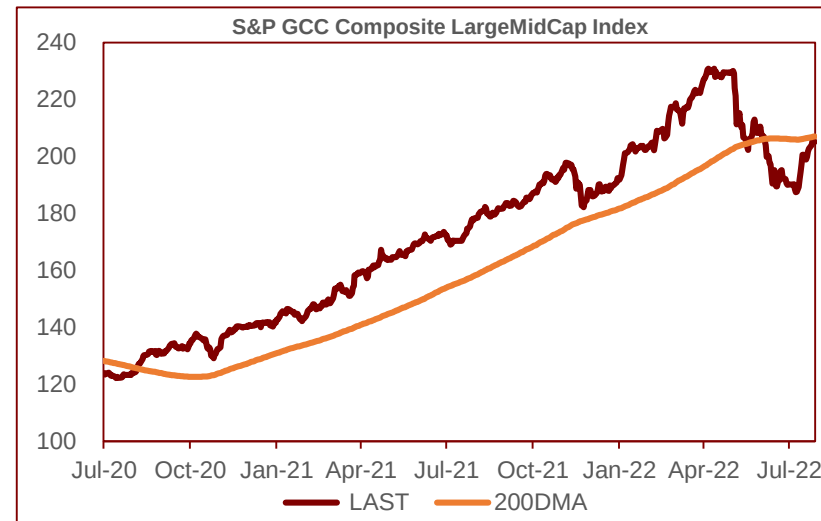




Market Watch

Thursday, August 25, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,591.74	1.19	-0.24	3.22	9.27	11.61	11,897 SAR	2.12	18.25
Qatar (QE Index)	13,746.39	0.70	-1.94	2.81	12.76	18.24	681 QAR	1.64	15.66
Dubai (DFMGI)	3,462.89	1.20	0.88	3.74	7.43	8.35	466 AED	1.43	14.06
Abu Dhabi (ADI)	10,078.87	0.20	-0.75	3.71	6.90	18.06	1,435 AED	2.17	26.77
Bahrain (BAX)	1,900.76	0.00	0.16	-0.25	3.32	5.76	20 BHD	1.13	11.60
MUSCAT SE INDEX	4,537.71	-0.31	-1.50	0.12	10.07	9.88	5 OMR	0.96	13.25
SP GCC Comp LMC	209.95	0.96	-0.53	2.71	8.93	10.52			
SP UAE PRICE INDEX	149.51	0.58	-1.07	0.29	5.00	0.64			
Developed Markets									
MSCI World Index	2,694.62	1.19	-2.05	0.81	8.73	-14.33			
U.S. (S&P 500)	4,057.66	1.41	-1.98	1.67	10.93	-11.90			
U.K. (FTSE 100)	7,427.31	0.11	-0.82	0.76	4.33	1.29			
Japan (Topix)	1,979.59	0.48	-0.70	1.87	5.65	-0.79			
Emerging Markets									
MSCI EM Index	1,006.50	1.86	-0.61	0.97	0.28	-18.55			
China (SSE Composite)	3,236.22	0.97	-0.95	-0.21	-4.48	-10.81			
India (Sensex)	58,833.87	-0.53	-2.53	2.09	10.86	0.89			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,785.95	-0.28	1.31	0.89	5.09	10.55	46.37 KWD	2.39	22.71
Kuwait Premier Index	8,705.91	-0.40	1.47	1.20	5.61	13.96	35.83 KWD	2.55	24.17
Kuwait Main Index	5,863.16	0.17	0.72	-0.21	3.21	-0.39	10.54 KWD	1.81	17.74
NIC 50	9,779.62	-0.34	1.46	1.19	5.60	14.75	28.60 KWD	2.53	23.17
Kuwait Sector									
Banking	1,879.52	-0.50	1.66	1.19	5.54	15.82	28.02 KWD	1.36	25.17
Telecom	1,273.68	-0.13	0.82	2.36	5.27	16.92	3.90 KWD	1.06	13.59
Industrials	1,233.33	-0.17	0.73	-1.38	5.95	8.05	4.36 KWD	0.87	12.32
Financial services	1,435.34	0.21	0.36	-0.19	4.63	0.84	3.74 KWD	0.81	15.28
Real estate	1,268.93	0.32	1.71	1.08	5.29	-4.33	2.74 KWD	0.65	28.76
Basic materials	1,010.85	0.18	-0.48	0.44	-0.20	-1.36	0.90 KWD	1.35	11.23
Health care	437.04	1.40	-0.02	-5.43	-8.20	-45.17	0.22 KWD	2.34	11.02
Consumer services	525.02	-0.46	1.12	-3.27	-0.45	-28.19	0.80 KWD	0.99	11.38
Insurance	1,568.63	0.82	2.95	3.82	1.69	2.30	0.65 KWD	0.82	8.02
Consumer Disc	1,553.83	-0.39	0.00	1.67	4.37	16.25	0.16 KWD	1.05	21.30
Energy	1,189.34	0.10	1.09	3.69	1.81	-16.72	0.25 KWD	0.84	12.22
Technology	614.01	-0.59	-3.87	-13.88	-12.08	-10.21	0.01 KWD	0.74	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

Oil prices rose in early Asian trade on Thursday after Saudi Arabia suggested the Organization of the Petroleum Exporting Countries could consider cutting output, though bearish economic signals from central bankers and falling equities weighed, U.S. crude futures rose 34 cents to \$95.23 a barrel.

Kuwait Market

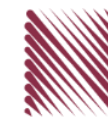
The market closed down today by -0.28% at 7,785.95 value traded 47.7 million KD, Premier market value traded reached 35.6 million KD and closed at 8,705.91 down by -0.40%.

Saudi Market

The Market closed up today by +1.19%, 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



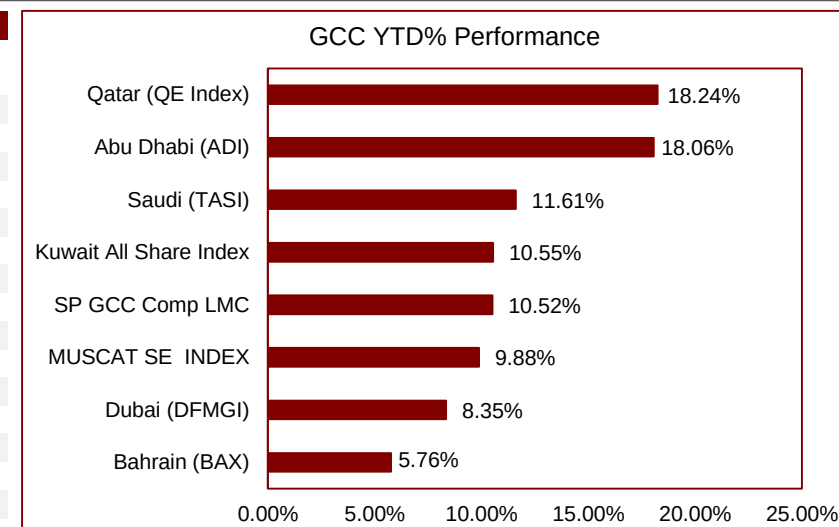
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.070	0.28	0.66	0.38	2.59	12.69	8.07 KWD	2.08	27.00
KFH	0.904	-1.74	2.49	2.38	3.79	19.52	8.39 KWD	3.87	32.00
Zain	0.620	-0.48	-0.32	2.48	4.38	4.20	2.68 KWD	2.26	13.59
BOUBYAN BANK	0.860	-0.69	3.74	3.86	11.25	20.73	3.21 KWD	3.47	34.00
Agility	0.865	-0.23	1.76	-2.70	6.40	9.84	2.31 KWD	1.48	2.74
Saudi Arabia									
ARAMCO	39.35	0.51	-0.38	-1.01	1.42	20.91	8,653.54 SAR	6.65	16.29
SABIC	103.80	1.96	-2.26	2.98	2.17	-10.52	311.28 SAR	1.72	35.00
STC	104.60	0.77	-0.95	3.77	7.72	-6.94	209.12 SAR	2.91	18.17
AL-RAJHI BANK	92.00	1.55	1.21	3.49	11.52	3.81	367.85 SAR	4.49	24.74
NCB	71.40	0.85	-0.83	2.44	8.35	10.87	319.60 SAR	1.97	17.98
United Arab Emirates									
ETISALAT.AD	25.78	-0.23	-5.22	-7.60	-1.23	-18.68	226.81 AED	4.81	23.95
FAB.AD	19.92	0.91	0.91	2.57	6.07	6.97	223.16 AED	2.00	14.81
EMIRATES NBD	13.50	0.00	-2.53	-2.17	2.27	-0.37	86.54 AED	1.01	9.16
DB ISLAMIC BK	5.91	0.51	-0.51	0.51	2.60	9.85	43.15 AED	1.10	8.94
EMAAR PROPERT	6.21	4.02	5.08	12.91	19.42	26.99	49.90 AED	0.78	6.88
Qatar									
QNB	21.10	0.00	-6.64	2.88	5.61	4.51	192.99 QAR	1.92	15.65
INDUSTRIES QAT	18.37	2.06	2.06	5.39	15.17	18.59	110.06 QAR	2.86	11.13
QA ISLAMIC BK	26.50	0.76	-3.28	0.68	19.10	44.57	62.01 QAR	2.48	17.50
MASRAF AL RAYA	4.61	0.11	-4.10	0.87	11.69	-0.58	42.48 QAR	1.80	23.08
MESAIEED PETRO	2.70	1.93	2.90	-3.33	8.31	29.04	33.55 QAR	2.03	17.03
OMAN									
BANK MUSCAT	0.608	0.66	-1.30	1.33	15.15	31.90	2.28 OMR	1.07	8.33
OMANTEL	0.888	0.00	-1.33	-2.63	1.83	18.09	0.67 OMR	1.15	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	0.00	-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
17-August 22	23.76%	16.36%	0.06%	1.24%	0.41%	6.00%	17.67%	11.34%	5.76%	3.98%
25-August 22	23.76%	16.35%	0.06%	1.24%	0.40%	5.85%	17.70%	11.35%	5.75%	3.99%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.28 %The leading sector bottom performance indices today are Technology -0.59 % Banking -0.5 % Consumer services -0.46 % respectively

KSA

Saudi Armco has a positive performance today by + 0.51 %, SABIC has a positive performance today by + 1.96 %, STC has a positive performance today by + 0.77 %, Al Rajhi Bank has a positive performance today by + 1.55 %.

UAE

ETISALAT .AD has a negative performance today by -0.23 %, FAB.AD has a positive performance today by + 0.91 %



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