



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

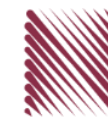
GCC DAILY MORNING BRIEF

Monday, August 29th 2022



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



Market Watch

Monday, August 29, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,530.66	0.04	-0.49	2.72	8.74	11.07	11,689 SAR	2.15	18.39
Qatar (QE Index)	13,626.99	-0.43	-0.87	1.92	11.78	17.21	679 QAR	1.61	15.58
Dubai (DFMGI)	3,436.43	-0.76	-0.76	2.95	6.61	7.53	462 AED	1.46	14.28
Abu Dhabi (ADI)	9,964.01	-1.14	-0.58	3.11	6.29	17.38	1,435 AED	2.16	27.85
Bahrain (BAX)	1,914.56	0.64	0.73	0.47	4.07	6.53	20 BHD	1.16	11.67
MUSCAT SE INDEX	4,589.72	-0.24	1.15	1.27	11.33	11.14	5 OMR	0.98	13.25
SP GCC Comp LMC	208.66	-0.17	-0.49	2.20	8.39	9.97			
SP UAE PRICE INDEX	147.52	-1.33	-0.60	-0.31	4.37	0.04			

Developed Markets

MSCI World Index	2,668.79	-0.96	-3.60	-2.82	4.82	-17.42			
U.S. (S&P 500)	4,030.61	-0.67	-4.01	-2.41	6.48	-15.43			
U.K. (FTSE 100)	7,427.31	0.00	-0.70	0.05	3.60	0.58			
Japan (Topix)	1,944.10	-1.79	-1.64	0.20	3.92	-2.42			

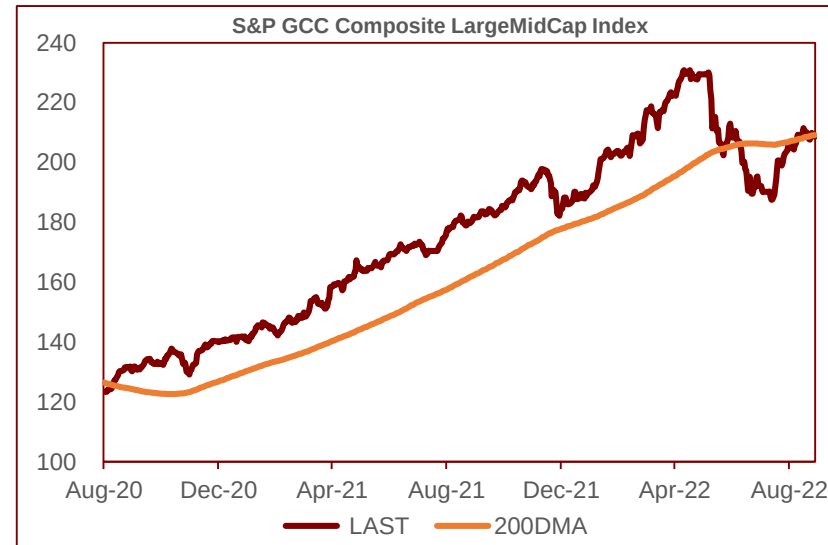
Emerging Markets

MSCI EM Index	991.65	-1.48	-1.17	-0.21	-0.90	-19.51			
China (SSE Composite)	3,240.73	0.14	-0.17	-0.38	-4.65	-10.96			
India (Sensex)	57,972.62	-1.46	-1.36	0.70	9.34	-0.48			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,746.52	0.31	-0.51	0.38	4.56	9.99	46.26 KWD	2.38	22.66
Kuwait Premier Index	8,656.85	0.35	-0.56	0.63	5.02	13.32	35.72 KWD	2.55	24.13
Kuwait Main Index	5,845.87	0.15	-0.29	-0.50	2.91	-0.69	10.54 KWD	1.80	17.66
NIC 50	9,728.49	0.31	-0.57	0.62	5.01	14.15	28.60 KWD	2.53	23.13

Kuwait Sector

Banking	1,871.36	0.44	-0.43	0.75	5.08	15.32	27.97 KWD	1.37	25.13
Telecom	1,265.06	0.02	-0.68	1.67	4.56	16.13	3.89 KWD	1.05	13.48
Industrials	1,220.14	0.22	-1.07	-2.44	4.82	6.89	4.33 KWD	0.91	12.52
Financial services	1,423.21	-0.31	-0.85	-1.03	3.75	-0.01	3.72 KWD	0.80	14.49
Real estate	1,268.88	0.82	0.00	1.07	5.28	-4.34	2.74 KWD	0.65	28.53
Basic materials	1,006.03	0.00	-0.48	-0.04	-0.68	-1.83	0.90 KWD	1.35	11.17
Health care	437.04	0.00	0.00	-5.43	-8.20	-45.17	0.22 KWD	2.34	11.02
Consumer services	523.99	-0.06	-0.20	-3.46	-0.64	-28.33	0.80 KWD	0.99	11.29
Insurance	1,579.23	-0.10	0.68	4.53	2.38	2.99	0.66 KWD	0.81	8.02
Consumer Disc	1,541.18	-0.11	-0.81	0.85	3.52	15.30	0.16 KWD	1.04	21.25
Energy	1,202.22	0.27	1.08	4.81	2.91	-15.82	0.25 KWD	0.84	12.40
Technology	611.10	0.00	-0.47	-14.29	-12.50	-10.64	0.01 KWD	0.74	0.00
Utilities	521.05	0.00	0.00	-1.00	-4.35	-13.16	0.22 KWD	2.23	15.16



What Move the GCC markets

Oil Prices

Oil rose Monday as potential OPEC+ output cuts and conflict in Libya helped to offset a strong U.S. dollar and a dire outlook for U.S. growth. Saudi Arabia, de facto leader of the Organization of the Petroleum Exporting Countries (OPEC) last week raised the possibility of production cuts, which sources said could coincide with a boost in supply from Iran should it clinch a nuclear deal with the West. Brent crude rose 21 cents to \$101.20 a barrel

Kuwait Market

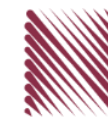
The market closed up today by +0.31% at 7,746.52 value traded 35.8 million KD, Premier market value traded reached 26.3 million KD and closed at 8,656.85 up by +0.35%.

Saudi Market

The Market closed up today by +0.04%, KSA Market closed up as oil prices are relatively stable. And listed companies start declaration their positive semiannual financial performance.

DAILY MARKETS WRAP,

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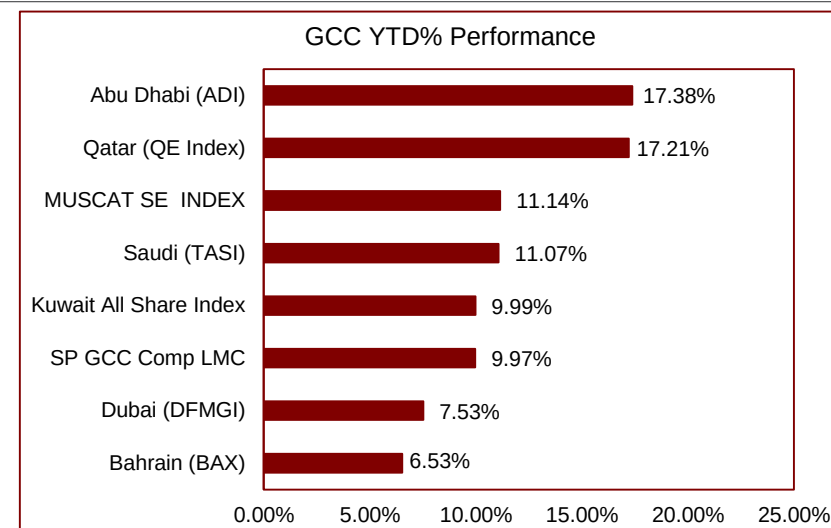
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.059	-0.28	-1.03	-0.66	1.53	11.53	8.01 KWD	2.05	27.00
KFH	0.906	1.80	0.22	2.60	4.02	19.78	8.43 KWD	3.88	32.00
Zain	0.615	-0.16	-0.81	1.65	3.54	3.36	2.67 KWD	2.24	13.48
BOUBYAN BANK	0.856	-0.12	-0.47	3.38	10.74	20.16	3.21 KWD	3.45	34.00
Agility	0.849	-0.12	-1.85	-4.50	4.43	7.81	2.28 KWD	1.45	2.69
Saudi Arabia									
ARAMCO	38.45	-0.65	-2.29	-3.27	-0.90	18.14	8,456.75 SAR	6.50	16.10
SABIC	102.40	-0.78	-1.35	1.59	0.79	-11.72	307.12 SAR	1.70	35.00
STC	105.00	-0.76	0.38	4.17	8.14	-6.58	209.94 SAR	2.92	18.52
AL-RAJHI BANK	91.10	0.44	-0.98	2.47	10.42	2.79	364.30 SAR	4.45	24.77
NCB	70.50	0.00	-1.26	1.15	6.98	9.47	315.61 SAR	1.94	17.91
United Arab Emirates									
ETISALAT.AD	25.84	-0.92	0.23	-7.38	-1.00	-18.49	224.73 AED	4.77	24.00
FAB.AD	19.60	-2.97	-1.61	0.93	4.37	5.25	216.53 AED	1.94	14.57
EMIRATES NBD	13.55	-1.09	0.37	-1.81	2.65	0.00	85.59 AED	1.00	9.19
DB ISLAMIC BK	5.90	-1.01	-0.17	0.34	2.43	9.67	42.72 AED	1.09	8.92
EMAAR PROPERT	6.04	-0.98	-2.74	9.82	16.15	23.52	49.41 AED	0.78	6.69
Qatar									
QNB	21.00	0.96	-0.47	2.39	5.11	4.01	193.01 QAR	1.91	15.58
INDUSTRIES QAT	18.61	-0.37	1.31	6.77	16.68	20.14	112.04 QAR	2.90	11.28
QA ISLAMIC BK	26.05	-0.76	-1.70	-1.03	17.08	42.12	61.25 QAR	2.44	17.20
MASRAF AL RAYA	4.53	-1.26	-1.80	-0.94	9.69	-2.37	41.92 QAR	1.76	22.66
MESAIEED PETRO	2.64	-0.57	-2.30	-5.56	5.82	26.08	32.94 QAR	1.98	16.64
OMAN									
BANK MUSCAT	0.608	0.66	0.00	1.33	15.15	31.90	2.29 OMR	1.07	8.33
OMANTEL	0.900	1.35	1.35	-1.32	3.21	19.68	0.68 OMR	1.17	7.69
BANK DHOFAR	0.140	0.00	3.70	7.69	19.66	11.11	0.42 QAR	0.60	14.93
NAT BANK OF OMAN	0.269	-1.47	-0.37	10.25	28.10	36.55	0.44 QAR	0.77	12.71
OMINVEST	0.330	0.00	-2.94	-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
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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Leading Sector, Security Performance

Kuwait

The market is up today by + 0.31 %The leading sector best performance indices today are Real estate 0.82 % Banking 0.44 % Energy 0.27 % respectively

KSA

Saudi Armco has a negative performance today by -0.65 %, SABIC has a negative performance today by -0.78 %, STC have negative performance today by -0.76 %, Al Rajhi Bank has a positive performance today by + 0.44 %

UAE

ETISALAT .AD have negative performance today by -0.92 %, FAB.AD have negative performance today by -2.97 %



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