

شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, August 2nd , 2022



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



Market Watch

Tuesday, August 2, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,310.63	-0.23	-0.23	0.91	6.83	9.12	11,894 SAR	2.05	19.20
Qatar (QE Index)	13,302.33	-1.24	-1.24	-0.51	9.11	14.42	661 QAR	1.61	15.35
Dubai (DFMGI)	3,347.93	-0.86	-0.86	0.30	3.87	4.76	455 AED	1.27	32.29
Abu Dhabi (ADI)	9,894.84	1.20	1.20	2.39	5.55	16.57	1,435 AED	2.10	18.40
Bahrain (BAX)	1,900.24	-0.31	-0.31	-0.28	3.29	5.73	20 BHD	1.18	171.87
MUSCAT SE INDEX	4,645.87	1.21	1.21	2.51	12.69	12.50	5 OMR	0.96	13.25
SP GCC Comp LMC	205.61	-0.32	-0.32	0.71	6.81	8.36			
SP UAE PRICE INDEX	149.11	-0.18	-0.18	-0.18	5.50	1.11			

Developed Markets

MSCI World Index	2,728.30	-0.76	-0.76	-0.66	7.15	-15.58			
U.S. (S&P 500)	4,091.19	-0.67	-0.67	-0.95	8.08	-14.16			
U.K. (FTSE 100)	7,409.11	-0.06	-0.06	-0.19	3.35	0.33			
Japan (Topix)	1,925.49	-1.77	-1.77	-0.76	2.92	-3.35			

Emerging Markets

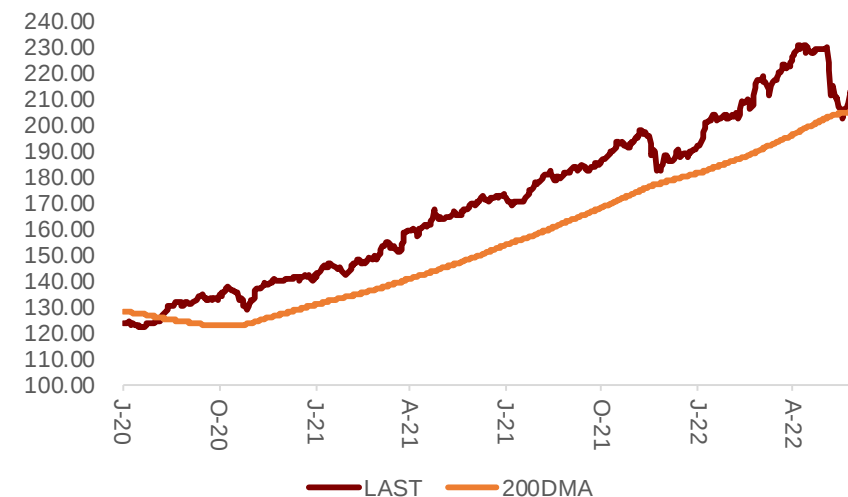
MSCI EM Index	984.32	-1.08	-1.08	-0.95	-1.63	-20.10			
China (SSE Composite)	3,186.27	-2.26	-2.26	-2.06	-6.25	-12.46			
India (Sensex)	58,136.36	0.04	0.04	0.98	9.65	-0.20			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,722.08	-0.56	-0.56	0.07	4.23	9.64	46.12 KWD	2.35	21.22
Kuwait Premier Index	8,619.90	-0.51	-0.51	0.20	4.57	12.84	35.55 KWD	2.49	22.89
Kuwait Main Index	5,851.56	-0.77	-0.77	-0.40	3.01	-0.59	10.57 KWD	1.88	15.64
NIC 50	9,692.07	-0.51	-0.52	0.19	4.56	13.72	28.60 KWD	2.47	21.89

Kuwait Sector

Banking	1,861.03	-0.51	-0.51	0.19	4.50	14.68	27.82 KWD	1.37	23.89
Telecom	1,251.84	-0.30	-0.30	0.61	3.47	14.91	3.84 KWD	0.96	13.46
Industrials	1,249.82	-0.49	-0.49	-0.06	7.37	9.49	4.46 KWD	1.00	10.98
Financial services	1,421.26	-1.57	-1.57	-1.17	3.61	-0.14	3.71 KWD	0.78	15.78
Real estate	1,256.28	-0.56	-0.56	0.07	4.24	-5.29	2.71 KWD	0.62	24.41
Basic materials	995.09	-1.76	-1.76	-1.13	-1.76	-2.90	0.89 KWD	1.45	9.77
Health care	461.25	-0.19	-0.19	-0.19	-3.11	-42.13	0.23 KWD	2.66	12.82
Consumer services	539.75	0.20	0.20	-0.56	2.35	-26.17	0.80 KWD	0.94	39.15
Insurance	1,516.20	0.10	0.10	0.35	-1.71	-1.12	0.63 KWD	0.74	8.02
Consumer Disc	1,544.32	0.97	0.97	1.05	3.73	15.54	0.16 KWD	1.01	10.48
Energy	1,157.48	0.12	0.12	0.91	-0.92	-18.95	0.24 KWD	0.81	15.45
Technology	691.12	-3.06	-3.06	-3.06	-1.04	1.06	0.01 KWD	0.83	0.00
Utilities	528.95	0.50	0.50	0.50	-2.90	-11.84	0.22 KWD	2.53	15.50

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices fell about 1%, reversing gains from the previous session ahead of a meeting OPEC+ producers on fears of a slowdown in global growth hitting fuel demand and a firmer dollar.

Kuwait Market

The market closed down today by - 0.56% at 7,722.08 value traded 63.4 million KD, Premier market value traded reached 40.5 million KD and closed at 8,619.9 down by -0.51%.

Saudi Market

The Market closed down today by -0.23%, Most GCC Market closed down as oil prices are starting declined. And global geopolitical situation.

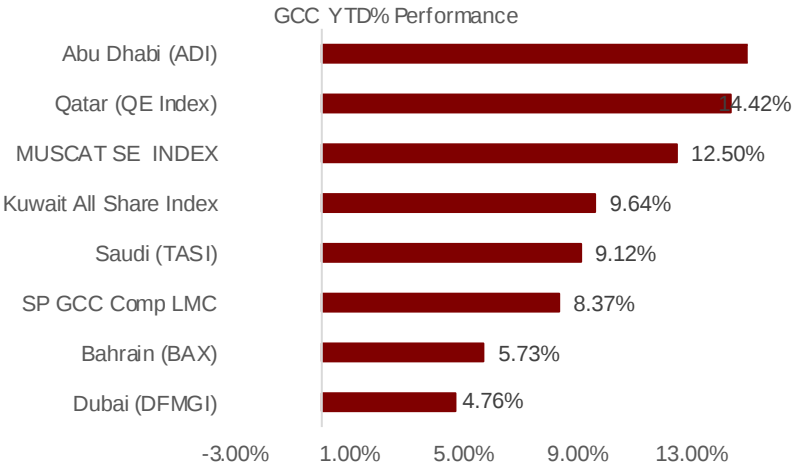


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.073	-0.19	-0.19	0.66	2.88	13.00	8.10 KWD	2.08	27.00
KFH	0.886	-0.34	-0.34	0.34	1.72	17.14	8.23 KWD	3.80	32.00
Zain	0.614	0.00	0.00	1.49	3.37	3.19	2.66 KWD	2.24	13.46
BOUBYAN BANK	0.830	-1.43	-1.43	0.24	7.37	16.51	3.10 KWD	3.35	34.00
Agility	0.889	-0.56	-0.56	0.00	9.35	12.89	2.38 KWD	1.24	2.76
Saudi Arabia									
ARAMCO	39.85	-0.50	-0.50	0.25	2.71	22.44	8,769.80 SAR	7.32	19.76
SABIC	101.60	-0.39	-0.39	0.79	0.00	-12.41	304.90 SAR	1.62	35.00
STC	101.20	0.00	0.00	0.40	4.22	-9.96	202.46 SAR	2.87	17.74
AL-RAJHI BANK	88.10	-1.34	-1.34	-0.90	6.79	-0.59	352.51 SAR	4.50	22.14
NCB	72.10	1.84	1.84	3.44	9.41	11.96	322.97 SAR	1.99	17.98
United Arab Emirates									
ETISALAT.AD	28.00	-1.41	-1.41	0.36	7.28	-11.67	243.51 AED	5.17	26.01
FAB.AD	19.76	1.33	1.33	1.75	5.22	6.11	218.30 AED	1.96	14.69
EMIRATES NBD	13.95	-1.06	-1.06	1.09	5.68	2.95	88.12 AED	1.03	9.46
DB ISLAMIC BK	5.88	-0.84	-0.84	0.00	2.08	9.29	42.58 AED	1.08	8.89
EMAAR PROPERT	5.49	-0.72	-0.72	-0.18	5.58	12.27	44.91 AED	0.71	7.40
Qatar									
QNB	20.80	0.00	0.00	1.41	4.10	3.02	191.76 QAR	1.89	15.43
INDUSTRIES QAT	16.94	-2.08	-2.08	-2.81	6.21	9.36	102.30 QAR	2.83	10.99
QA ISLAMIC BK	25.80	-2.64	-2.64	-1.98	15.96	40.75	60.85 QAR	2.41	17.03
MASRAF AL RAYA	4.57	-1.51	-1.51	-0.07	10.65	-1.51	42.42 QAR	1.78	22.86
MESAIEED PETRO	2.83	0.07	0.07	1.51	13.73	35.50	35.51 QAR	2.21	18.47
OMAN									
BANK MUSCAT	0.616	2.67	2.67	2.67	16.67	33.64	2.31 OMR	1.09	8.33
OMANTEL	0.956	7.66	1.27	4.82	9.63	27.13	0.72 OMR	1.28	7.69
BANK DHOFAR	0.131	0.77	0.77	0.77	11.97	3.97	0.39 QAR	0.56	14.93
NAT BANK OF OMAN	0.263	1.15	1.15	7.79	25.24	33.50	0.43 QAR	0.76	12.71
OMINVEST	0.344	1.18	1.18	0.58	12.42	12.42	0.23 QAR	0.76	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
20-July- 22	23.37%	15.99%	0.06%	1.20%	0.41%	6.15%	17.48%	11.29%	5.72%	4.00%
27-July- 22	23.45%	16.11%	0.06%	1.19%	0.41%	6.22%	17.51%	11.28%	5.73%	3.98%

End of Report
The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed and others authorized to receive it.

Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is down today by -0.56 %The leading sector bottom performance indices today are Technology – 3.06 % Basic Materials -1.76% respectively.

KSA
Saudi Armco have negative performance today by -0.5 %, SABIC have negative performance today by -0.39%. STC flat performance today 0 %, Al Rajhi Bank have negative performance today by -1.34 %

UAE
ETISALAT .AD have negative performance today by -1.41 %, FAB.AD has a positive performance today by + 1.33 %



شركة الاستثمار الوطنية
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