

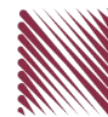


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, August 3rd, 2022

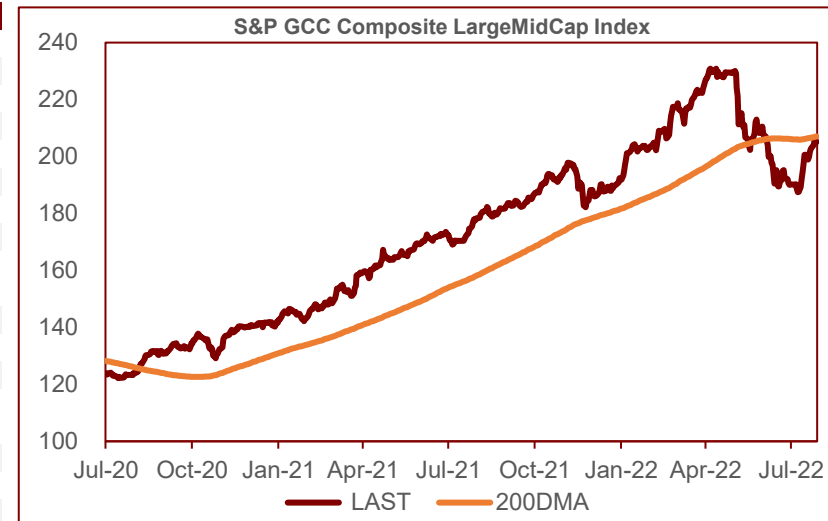




Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,291.93	-0.15	-0.38	0.76	6.67	8.95	11,897 SAR	2.10	19.32
Qatar (QE Index)	13,386.21	0.63	-0.62	0.12	9.80	15.14	667 QAR	1.64	15.32
Dubai (DFMGI)	3,338.80	-0.27	-1.13	0.03	3.58	4.47	454 AED	1.26	32.06
Abu Dhabi (ADI)	9,846.09	-0.49	0.70	1.89	5.03	16.00	1,435 AED	2.10	18.35
Bahrain (BAX)	1,896.43	-0.20	-0.51	-0.48	3.09	5.52	20 BHD	1.18	18.00
MUSCAT SE INDEX	4,664.77	0.41	1.62	2.93	13.15	12.96	5 OMR	0.97	13.25
SP GCC Comp LMC	205.20	-0.20	-0.52	0.51	6.60	8.14			
SP UAE PRICE INDEX	148.82	-0.19	-0.38	0.56	5.29	0.92			
Developed Markets									
MSCI World Index	2,755.25	0.99	0.22	0.32	8.21	-14.74			
U.S. (S&P 500)	4,155.17	1.56	0.89	0.60	9.77	-12.82			
U.K. (FTSE 100)	7,445.68	0.49	0.44	0.30	3.86	0.83			
Japan (Topix)	1,930.77	0.27	-1.50	-0.49	3.20	-3.09			
Emerging Markets									
MSCI EM Index	985.81	0.15	-0.93	-0.80	-1.48	-19.98			
China (SSE Composite)	3,163.67	-0.71	-2.95	-2.75	-6.91	-13.08			
India (Sensex)	58,350.53	0.37	0.40	1.36	10.06	0.17			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,727.02	0.06	-0.50	0.13	4.30	9.71	46.18 KWD	2.36	21.26
Kuwait Premier Index	8,621.30	0.02	-0.49	0.21	4.59	12.86	35.57 KWD	2.49	22.93
Kuwait Main Index	5,865.55	0.24	-0.53	-0.17	3.25	-0.35	10.61 KWD	1.90	15.70
NIC 50	9,690.09	-0.02	-0.50	0.20	4.58	13.70	28.60 KWD	2.47	21.93
Kuwait Sector									
Banking	1,861.56	0.03	-0.48	0.22	4.53	14.71	27.84 KWD	1.37	23.93
Telecom	1,252.84	0.08	-0.22	0.69	3.55	15.01	3.85 KWD	1.01	13.37
Industrials	1,254.27	0.36	-0.14	0.29	7.75	9.88	4.47 KWD	1.00	11.05
Financial services	1,425.04	0.27	-1.31	-0.90	3.88	0.12	3.72 KWD	0.78	16.09
Real estate	1,247.39	-0.71	-1.26	-0.64	3.50	-5.96	2.70 KWD	0.61	24.43
Basic materials	998.46	0.34	-1.43	-0.79	-1.42	-2.57	0.89 KWD	1.45	9.80
Health care	461.25	0.00	-0.19	-0.19	-3.11	-42.13	0.23 KWD	2.66	12.82
Consumer services	535.64	-0.76	-0.56	-1.32	1.57	-26.74	0.81 KWD	0.97	41.25
Insurance	1,524.99	0.58	0.68	0.94	-1.14	-0.55	0.64 KWD	0.74	8.02
Consumer Disc	1,555.50	0.72	1.70	1.78	4.48	16.37	0.16 KWD	1.00	10.38
Energy	1,150.75	-0.58	-0.46	0.32	-1.49	-19.42	0.24 KWD	0.81	15.45
Technology	656.93	-4.95	-7.86	-7.86	-5.94	-3.94	0.01 KWD	0.79	0.00
Utilities	528.95	0.00	0.50	0.50	-2.90	-11.84	0.22 KWD	2.53	15.50



What Move the GCC markets

Oil Prices

Oil prices rose in early Asian trade on Thursday, bouncing off multi-month lows in the previous session caused by data signaling weak U.S. fuel demand. Brent crude futures rose 53 cents, or 0.6%, at \$97.31 a barrel, U.S. crude oil inventories rose unexpectedly last week as exports fell and refiners lowered runs, while gasoline stocks also posted a surprise build as demand slowed.

Kuwait Market

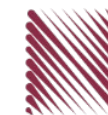
The market closed flat today by +0.06% at 7,727.02 value traded 39.05 million KD, Premier market value traded reached 27.39 million KD and closed at 8621.3 flat by +0.02%.

Saudi Market

The Market closed down today by -0.15%, Most GCC Market closed down as oil prices are starting declined. And global geopolitical situation.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



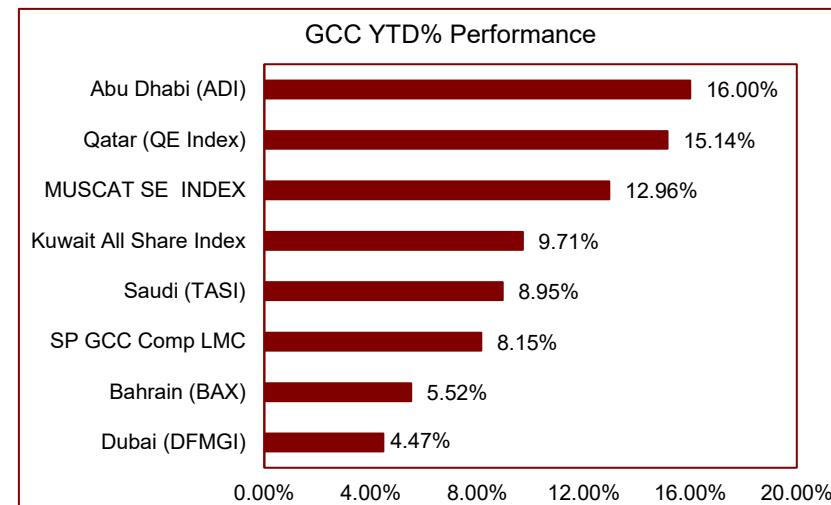
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.072	-0.09	-0.28	0.56	2.78	12.90	8.10 KWD	2.08	27.00
KFH	0.885	-0.11	-0.45	0.23	1.61	17.01	8.22 KWD	3.79	32.00
Zain	0.610	-0.65	-0.65	0.83	2.69	2.52	2.64 KWD	2.22	13.37
BOUBYAN BANK	0.836	0.72	-0.71	0.97	8.15	17.36	3.13 KWD	3.37	34.00
Agility	0.893	0.45	-0.11	0.45	9.84	13.40	2.39 KWD	1.25	2.77
Saudi Arabia									
ARAMCO	39.85	0.00	-0.50	0.25	2.71	22.44	8,774.00 SAR	7.32	19.66
SABIC	101.60	0.00	-0.39	0.79	0.00	-12.41	305.04 SAR	1.62	35.00
STC	101.60	0.40	0.40	0.79	4.63	-9.61	203.36 SAR	2.88	17.71
AL-RAJHI BANK	87.30	-0.91	-2.24	-1.80	5.82	-1.50	349.48 SAR	4.46	21.84
NCB	71.90	-0.28	1.55	3.16	9.10	11.65	322.23 SAR	1.98	18.31
United Arab Emirates									
ETISALAT.AD	28.00	0.00	-1.41	0.36	7.28	-11.67	243.52 AED	5.17	26.01
FAB.AD	19.80	0.20	1.54	1.96	5.43	6.32	218.75 AED	1.96	14.72
EMIRATES NBD	13.95	0.00	-1.06	1.09	5.68	2.95	88.12 AED	1.03	9.46
DB ISLAMIC BK	5.85	-0.51	-1.35	-0.51	1.56	8.74	42.36 AED	1.08	8.85
EMAAR PROPERT	5.43	-1.09	-1.81	-1.27	4.42	11.04	44.42 AED	0.70	7.32
Qatar									
QNB	20.95	0.72	0.72	2.15	4.85	3.76	193.77 QAR	1.91	15.54
INDUSTRIES QAT	17.06	0.71	-1.39	-2.12	6.96	10.14	103.36 QAR	2.86	11.06
QA ISLAMIC BK	26.09	1.12	-1.55	-0.87	17.26	42.33	61.73 QAR	2.44	17.22
MASRAF AL RAYA	4.56	-0.22	-1.72	-0.28	10.41	-1.72	42.47 QAR	1.78	22.81
MESAIEED PETRO	2.78	-1.77	-1.70	-0.29	11.73	33.11	35.00 QAR	2.17	18.15
OMAN									
BANK MUSCAT	0.624	1.30	4.00	4.00	18.18	35.37	2.34 OMR	1.10	8.33
OMANTEL	0.956	7.66	1.27	4.82	9.63	27.13	0.72 OMR	1.28	7.69
BANK DHOFAR	0.134	2.29	3.08	3.08	14.53	6.35	0.40 QAR	0.57	14.93
NAT BANK OF OMAN	0.260	-1.14	0.00	6.56	23.81	31.98	0.42 QAR	0.75	12.71
OMINVEST	0.342	-0.58	0.59	0.00	11.76	11.76	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 closed flat today by +.06% The leading sector performance indices today are Consumer Disc 0.72% , Insurance 0.58 and Basic Materials 0.36% respectively.

KSA

Saudi Armco flat performance today 0 % , SABIC flat performance today 0 % , STC has a positive performance today by + 0.4 % , Al Rajhi Bank have negative performance today by -0.91 %

UAE

ETISALAT .AD flat performance today 0 % , FAB.AD has a positive performance today by + 0.2 %



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