



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, September 4th 2022





Market Watch

Sunday, September 4, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,194.29	0.43	0.43	-0.72	5.82	8.09	11,436 SAR	2.11	18.10
Qatar (QE Index)	13,138.38	-0.34	-0.34	-2.14	7.77	13.01	660 QAR	1.55	14.95
Dubai (DFMGI)	3,394.32	-0.59	-0.59	-1.42	5.31	6.21	456 AED	1.42	13.83
Abu Dhabi (ADI)	9,754.51	0.36	0.36	-1.22	4.05	14.92	1,435 AED	2.10	27.03
Bahrain (BAX)	1,921.87	-0.04	-0.04	0.20	4.47	6.93	20 BHD	1.77	11.60
MUSCAT SE INDEX	4,584.61	-0.44	-0.44	-0.02	11.21	11.02	5 OMR	0.99	13.25
SP GCC Comp LMC	202.52	0.11	0.11	-1.26	5.20	6.73			
SP UAE PRICE INDEX	143.61	0.26	0.26	-1.65	1.61	-2.61			

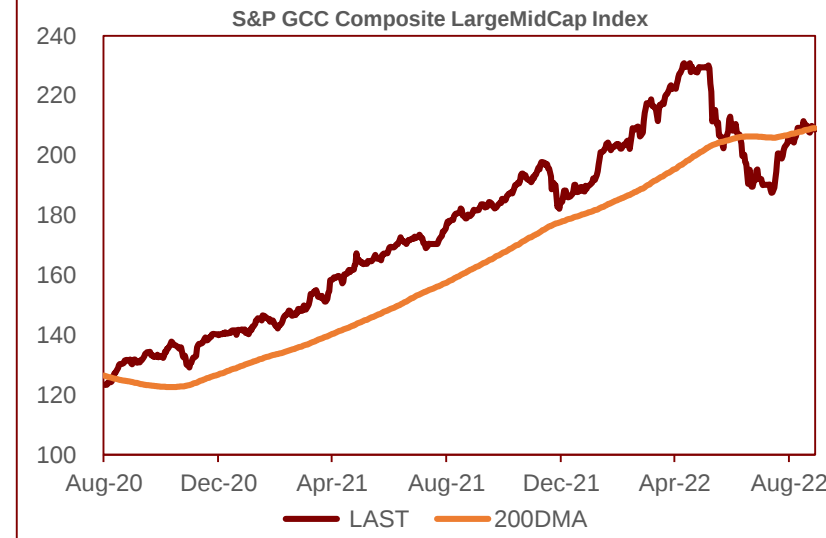
Developed Markets

MSCI World Index	2,605.21	-0.19	-0.19	-0.84	2.32	-19.39			
U.S. (S&P 500)	3,924.26	-1.07	-1.07	-0.78	3.67	-17.66			
U.K. (FTSE 100)	7,281.19	1.86	1.86	-0.04	1.56	-1.40			
Japan (Topix)	1,930.17	-0.27	-0.27	-1.68	3.17	-3.12			

Emerging Markets

MSCI EM Index	972.02	-0.42	-0.42	-2.22	-2.86	-21.10			
China (SSE Composite)	3,186.48	0.05	0.05	-0.49	-6.24	-12.45			
India (Sensex)	58,803.33	0.06	0.06	-1.23	10.91	0.94			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,600.49	-0.57	-0.57	-1.41	2.59	7.91	45.32 KWD	2.34	22.21
Kuwait Premier Index	8,476.76	-0.59	-0.59	-1.37	2.83	10.97	34.91 KWD	2.50	23.63
Kuwait Main Index	5,777.84	-0.52	-0.52	-1.54	1.71	-1.84	10.41 KWD	1.79	17.42
NIC 50	9,541.40	-0.58	-0.60	-1.38	2.82	11.96	28.60 KWD	2.48	22.63
Kuwait Sector									
Banking	1,839.91	-0.44	-0.44	-1.12	3.32	13.38	27.46 KWD	1.34	24.63
Telecom	1,240.15	-0.04	-0.04	-0.78	2.50	13.84	3.80 KWD	1.03	13.26
Industrials	1,172.00	-1.46	-1.46	-3.42	0.68	2.67	4.14 KWD	0.84	11.97
Financial services	1,395.02	-1.44	-1.44	-2.24	1.69	-1.99	3.66 KWD	0.80	14.82
Real estate	1,245.89	-1.00	-1.00	-1.71	3.38	-6.07	2.69 KWD	0.67	28.33
Basic materials	995.91	-0.60	-0.60	-1.37	-1.68	-2.82	0.89 KWD	1.35	11.07
Health care	453.68	7.45	7.45	4.89	-4.70	-43.08	0.22 KWD	2.51	10.80
Consumer services	525.70	-0.13	-0.13	-1.60	-0.32	-28.10	0.79 KWD	0.96	11.04
Insurance	1,579.61	-0.24	-0.24	0.28	2.40	3.01	0.66 KWD	0.81	8.02
Consumer Disc	1,523.61	-0.11	-0.11	-0.23	2.34	13.99	0.16 KWD	1.04	21.40
Energy	1,077.48	-2.32	-2.32	-10.20	-7.76	-24.55	0.22 KWD	0.81	11.92
Technology	603.82	-4.60	-4.60	-0.60	-13.54	-11.70	0.01 KWD	0.73	0.00
Utilities	539.47	1.48	1.48	1.99	-0.97	-10.09	0.23 KWD	2.31	15.70



What Move the GCC markets

Oil Prices

Oil prices rose on Friday on expectations that OPEC+ will discuss output cuts at a meeting on Sept. 5, though concern over China's COVID-19 curbs and weakness in the global economy loomed over the market. Brent crude futures rose 66 cents to settle at \$93.02 a barrel.

Kuwait Market

The market closed down today by -0.57% at 7,600.49 value traded 34.8 million KD, Premier market value traded reached 26.0 million KD and closed at 8,476.76 down by -0.59%.

Saudi Market

The Market closed up today by +0.43%, KSA Market closed up as oil prices are relatively stable. And listed companies start declaration their positive semiannual financial performance.

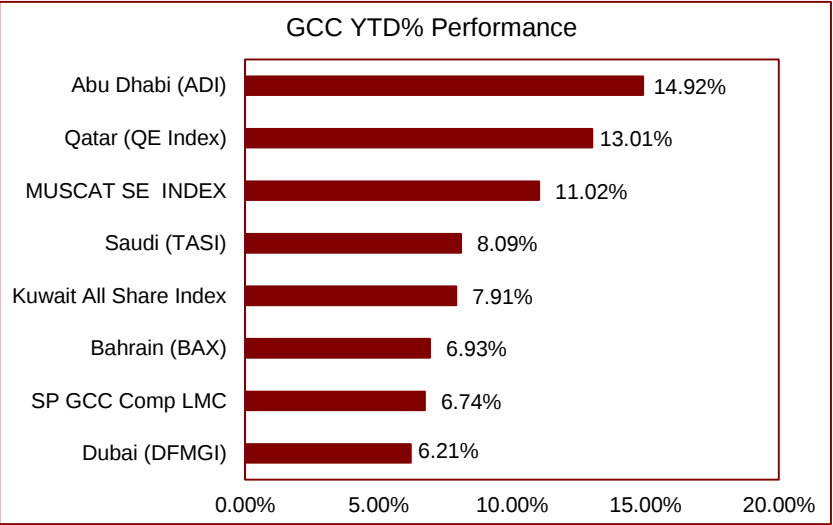


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.036	-0.38	-0.38	-1.71	-0.67	9.11	7.82 KWD	2.01	27.00
KFH	0.891	-1.00	-1.00	-1.00	2.30	17.80	8.27 KWD	3.82	32.00
Zain	0.605	0.83	0.83	0.00	1.85	1.68	2.62 KWD	2.20	13.26
BOUBYAN BANK	0.828	-0.48	-0.48	-0.84	7.12	16.23	3.10 KWD	3.34	34.00
Agility	0.805	-1.71	-1.71	-4.39	-0.98	2.22	2.15 KWD	1.37	2.55
Saudi Arabia									
ARAMCO	37.65	1.48	1.48	0.40	-2.96	15.68	8,283.00 SAR	6.36	15.44
SABIC	100.00	1.01	1.01	-0.20	-1.57	-13.79	300.00 SAR	1.66	35.00
STC	40.90	0.99	0.99	-2.15	5.30	-9.03	204.50 SAR	2.85	17.72
AL-RAJHI BANK	88.50	-0.45	-0.45	-1.88	7.27	-0.14	354.00 SAR	4.32	24.28
NCB	68.50	0.15	0.15	-2.00	3.95	6.37	306.74 SAR	1.89	17.37
United Arab Emirates									
ETISALAT.AD	25.32	0.80	0.80	-1.56	-2.99	-20.13	220.20 AED	4.67	23.52
FAB.AD	18.56	0.11	0.11	-2.83	-1.17	-0.33	205.04 AED	1.84	13.80
EMIRATES NBD	12.95	-0.77	-0.77	-3.00	-1.89	-4.43	81.80 AED	0.96	8.78
DB ISLAMIC BK	5.80	-0.85	-0.85	-0.85	0.69	7.81	42.00 AED	1.07	8.77
EMAAR PROPERT	6.16	-0.65	-0.65	-1.60	18.46	25.97	50.39 AED	0.79	6.82
Qatar									
QNB	20.00	0.00	0.00	-3.10	0.10	-0.94	185.64 QAR	1.82	14.83
INDUSTRIES QAT	18.00	0.95	0.95	-0.83	12.85	16.20	109.44 QAR	2.80	10.91
QA ISLAMIC BK	24.88	-0.08	-0.08	-2.85	11.82	35.73	59.08 QAR	2.33	16.43
MASRAF AL RAYA	4.40	-1.03	-1.03	-2.59	6.63	-5.09	41.16 QAR	1.71	22.03
MESAIEED PETRO	2.49	-2.62	-2.62	-4.15	0.08	19.23	31.46 QAR	1.87	15.73
OMAN									
BANK MUSCAT	0.598	-0.33	-0.33	-0.99	13.26	29.73	2.24 OMR	1.05	8.33
OMANTEL	0.932	4.95	-0.43	1.30	6.88	23.94	0.70 OMR	1.21	7.69
BANK DHOFAR	0.135	0.00	0.00	0.00	15.38	7.14	0.40 QAR	0.58	14.93
NAT BANK OF OMAN	0.270	0.00	0.00	0.00	28.57	37.06	0.44 QAR	0.78	12.71
OMINVEST	0.336	0.00	0.00	1.20	9.80	9.80	0.22 QAR	0.74	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
25-August 22	23.76%	16.36%	0.06%	1.24%	0.41%	6.00%	17.67%	11.34%	5.76%	3.98%
31-August 22	23.78%	16.45%	0.06%	1.23%	0.39%	5.85%	17.68%	11.36%	5.77%	4.01%

End of Report
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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is down today by -0.57 %The leading sector bottom performance indices today are Technology -4.6 % Energy -2.32 % Industrials -1.46 % respectively

KSA
Saudi Armco has a positive performance today by + 1.48 %, SABIC has a positive performance today by + 1.01 %, STC has a positive performance today by + 0.99 %, Al Rajhi Bank has a negative performance today by -0.45 %

UAE
ETISALAT .AD has a positive performance today by + 0.8 %, FAB.AD has a positive performance today by + 0.11 %



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