



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, September 5th 2022



DAILY MARKETS WRAP,

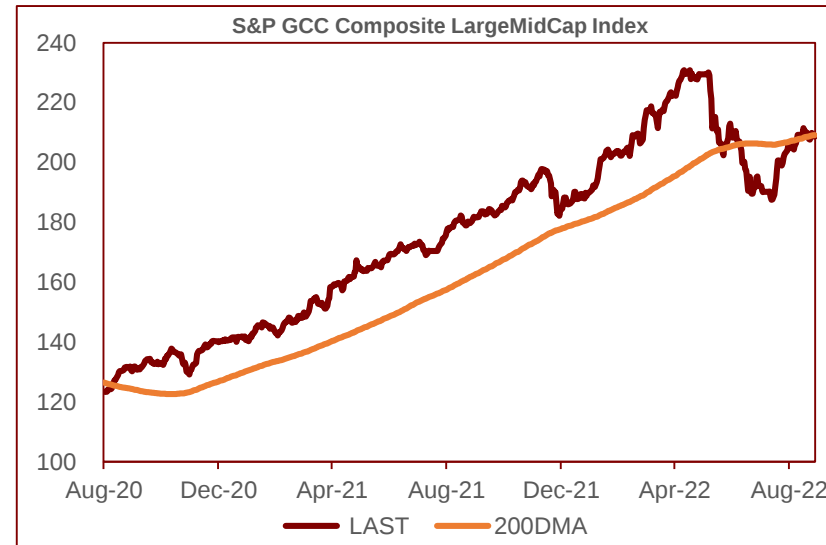
NIC RESEARCH AND STUDIES DEP



Market Watch

Monday, September 5, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,099.84	-0.77	-0.35	-1.49	5.00	7.25	11,376 SAR	2.10	18.11
Qatar (QE Index)	13,038.02	-0.76	-1.10	-2.89	6.95	12.15	654 QAR	1.54	14.79
Dubai (DFMGI)	3,354.43	-1.18	-1.76	-2.58	4.07	4.96	452 AED	1.40	13.62
Abu Dhabi (ADI)	9,686.81	-0.69	-0.34	-1.90	3.33	14.12	1,435 AED	2.09	27.00
Bahrain (BAX)	1,920.11	-0.09	-0.13	0.11	4.37	6.84	20 BHD	1.76	11.59
MUSCAT SE INDEX	4,619.79	0.77	0.33	0.75	12.06	11.87	5 OMR	0.98	13.25
SP GCC Comp LMC	200.57	-0.97	-0.85	-2.21	4.19	5.71			
SP UAE PRICE INDEX	141.34	-1.58	-1.32	-3.21	0.00	-4.15			
Developed Markets									
MSCI World Index	2,596.70	-0.33	-0.52	-1.17	1.98	-19.65			
U.S. (S&P 500)	3,924.26	0.00	-1.07	-0.78	3.67	-17.66			
U.K. (FTSE 100)	7,287.43	0.09	1.94	0.05	1.65	-1.32			
Japan (Topix)	1,928.79	-0.07	-0.35	-1.75	3.10	-3.19			
Emerging Markets									
MSCI EM Index	967.80	-0.43	-0.85	-2.65	-3.28	-21.45			
China (SSE Composite)	3,199.91	0.42	0.47	-0.07	-5.85	-12.08			
India (Sensex)	59,245.98	0.75	0.82	-0.49	11.74	1.70			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,569.09	-0.41	-0.99	-1.82	2.17	7.47	45.12 KWD	2.33	22.13
Kuwait Premier Index	8,427.45	-0.58	-1.17	-1.94	2.24	10.32	34.72 KWD	2.49	23.52
Kuwait Main Index	5,789.63	0.20	-0.32	-1.34	1.92	-1.64	10.40 KWD	1.80	17.51
NIC 50	9,541.40	-0.58	-1.18	-1.95	2.23	11.96	28.60 KWD	2.47	22.52
Kuwait Sector									
Banking	1,830.00	-0.54	-0.97	-1.65	2.76	12.77	27.32 KWD	1.34	24.52
Telecom	1,222.20	-1.45	-1.48	-2.22	1.02	12.19	3.75 KWD	1.02	13.00
Industrials	1,172.39	0.03	-1.43	-3.38	0.72	2.71	4.14 KWD	0.86	12.05
Financial services	1,395.17	0.01	-1.43	-2.23	1.71	-1.98	3.63 KWD	0.79	14.76
Real estate	1,248.69	0.22	-0.77	-1.49	3.61	-5.86	2.69 KWD	0.66	28.43
Basic materials	998.41	0.25	-0.35	-1.13	-1.43	-2.57	0.89 KWD	1.35	11.12
Health care	460.74	1.56	9.12	6.53	-3.22	-42.19	0.23 KWD	2.64	10.26
Consumer services	526.01	0.06	-0.07	-1.55	-0.26	-28.05	0.79 KWD	0.95	10.94
Insurance	1,581.06	0.09	-0.15	0.37	2.50	3.11	0.66 KWD	0.81	8.02
Consumer Disc	1,521.44	-0.14	-0.26	-0.38	2.19	13.83	0.16 KWD	1.03	21.56
Energy	1,093.42	1.48	-0.87	-8.88	-6.40	-23.44	0.23 KWD	0.82	12.26
Technology	603.82	0.00	-4.60	-0.60	-13.54	-11.70	0.01 KWD	0.73	0.00
Utilities	539.47	0.00	1.48	1.99	-0.97	-10.09	0.23 KWD	2.31	15.70



What Move the GCC markets

Oil Prices

Oil prices jumped more than \$1 a barrel on Monday, extending gains as investors eyed possible moves by OPEC+ producers to tweak production and support prices at a meeting later in the day. Brent crude futures rose \$1.43, or 1.5%, to \$94.45 a barrel.

Kuwait Market

The market closed down today by -0.41% at 7,569.09 value traded 27.9 million KD, Premier market value traded reached 20.5 million KD and closed at 8,427.45 down by -0.58%.

Saudi Market

The Market closed down today by -0.77%, KSA Market closed up as oil prices are relatively stable. And listed companies start declaration their positive semiannual financial performance.



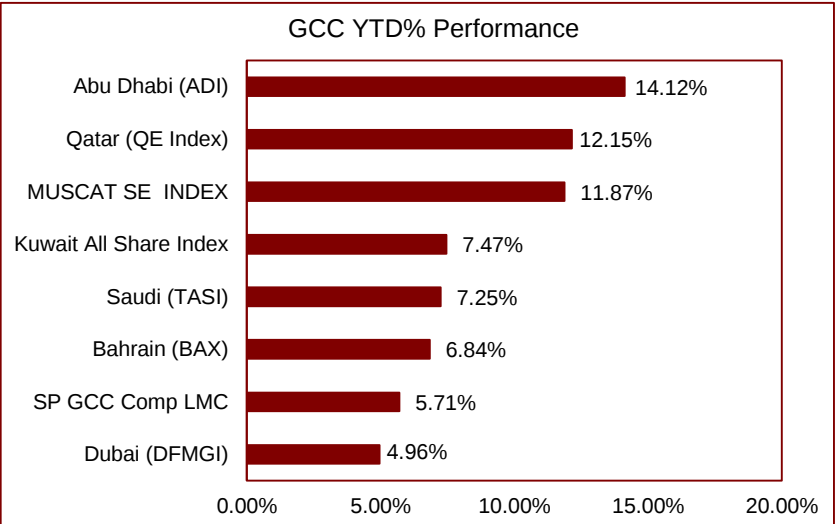
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.021	-1.45	-1.83	-3.13	-2.11	7.53	7.71 KWD	1.98	27.00
KFH	0.891	0.00	-1.00	-1.00	2.30	17.80	8.28 KWD	3.82	32.00
Zain	0.593	-1.98	-1.17	-1.98	-0.17	-0.34	2.57 KWD	2.16	13.00
BOUBYAN BANK	0.820	-0.97	-1.44	-1.80	6.08	15.11	3.07 KWD	3.31	34.00
Agility	0.802	-0.37	-2.08	-4.75	-1.35	1.84	2.15 KWD	1.37	2.54
Saudi Arabia									
ARAMCO	37.50	-0.40	1.08	0.00	-3.35	15.22	8,250.00 SAR	6.34	15.67
SABIC	100.00	0.00	1.01	-0.20	-1.57	-13.79	300.00 SAR	1.66	35.00
STC	40.45	-1.10	-0.12	-3.23	4.15	-10.03	202.25 SAR	2.81	17.90
AL-RAJHI BANK	87.80	-0.79	-1.24	-2.66	6.42	-0.93	351.20 SAR	4.29	24.17
NCB	67.20	-1.90	-1.75	-3.86	1.97	4.35	300.92 SAR	1.85	17.40
United Arab Emirates									
ETISALAT.AD	24.50	-3.24	-2.47	-4.74	-6.13	-22.71	213.07 AED	4.52	22.76
FAB.AD	18.34	-1.19	-1.08	-3.98	-2.34	-1.52	202.61 AED	1.82	13.63
EMIRATES NBD	12.75	-1.54	-2.30	-4.49	-3.41	-5.90	80.54 AED	0.94	8.65
DB ISLAMIC BK	5.74	-1.03	-1.88	-1.88	-0.35	6.69	41.56 AED	1.06	8.68
EMAAR PROPERT	6.04	-1.95	-2.58	-3.51	16.15	23.52	49.41 AED	0.78	6.69
Qatar									
QNB	19.60	-2.00	-2.00	-5.04	-1.90	-2.92	181.96 QAR	1.78	14.54
INDUSTRIES QAT	17.95	-0.28	0.67	-1.10	12.54	15.88	109.16 QAR	2.79	10.88
QA ISLAMIC BK	24.50	-1.53	-1.61	-4.33	10.11	33.66	58.19 QAR	2.29	16.17
MASRAF AL RAYA	4.37	-0.79	-1.82	-3.36	5.79	-5.84	40.84 QAR	1.70	21.86
MESAIEED PETRO	2.49	-0.08	-2.70	-4.23	0.00	19.14	31.44 QAR	1.87	15.72
OMAN									
BANK MUSCAT	0.596	-0.33	-0.67	-1.32	12.88	29.30	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	0.41 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	0.330	-1.79	-1.79	-0.60	7.84	7.84	0.22 QAR	0.73	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, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.41 %The leading sector bottom performance indices today are Telecom -1.45 % Banking -0.54 % Consumer Disc -0.14 % respectively

KSA

Saudi Armco has a negative performance today by -0.4 %, SABIC has a flat performance today, STC has a negative performance today by -1.1 %, Al Rajhi Bank has a negative performance today by -0.79 %

UAE

ETISALAT .AD has a negative performance today by -3.24 %, FAB.AD has a negative performance today by -1.19 %



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