



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, September 6th 2022



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



Market Watch

Tuesday, September 6, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
GCC Markets									
Saudi (TASI)	11,994.72	-0.87	-1.22	-2.35	4.09	6.32	11,270 SAR	2.06	17.95
Qatar (QE Index)	13,055.01	0.13	-0.97	-2.76	7.08	12.29	652 QAR	1.54	14.80
Dubai (DFMGI)	3,396.11	1.24	-0.54	-1.37	5.36	6.26	457 AED	1.41	13.76
Abu Dhabi (ADI)	9,662.65	-0.25	-0.59	-2.15	3.07	13.83	1,435 AED	2.08	27.00
Bahrain (BAX)	1,920.94	0.04	-0.09	0.15	4.42	6.88	20 BHD	1.76	11.59
MUSCAT SE INDEX	4,544.54	-1.63	-1.31	-0.89	10.24	10.05	5 OMR	0.98	13.25
SP GCC Comp LMC	199.66	-0.45	-1.30	-2.65	3.72	5.23			
SP UAE PRICE INDEX	141.53	0.13	-1.20	-3.08	0.13	-4.03			

Developed Markets

MSCI World Index	2,584.97	-0.45	-0.97	-1.61	1.52	-20.01			
U.S. (S&P 500)	3,908.19	-0.41	-1.48	-1.18	3.24	-18.00			
U.K. (FTSE 100)	7,300.44	0.18	2.13	0.22	1.83	-1.14			
Japan (Topix)	1,926.58	-0.11	-0.46	-1.86	2.98	-3.30			

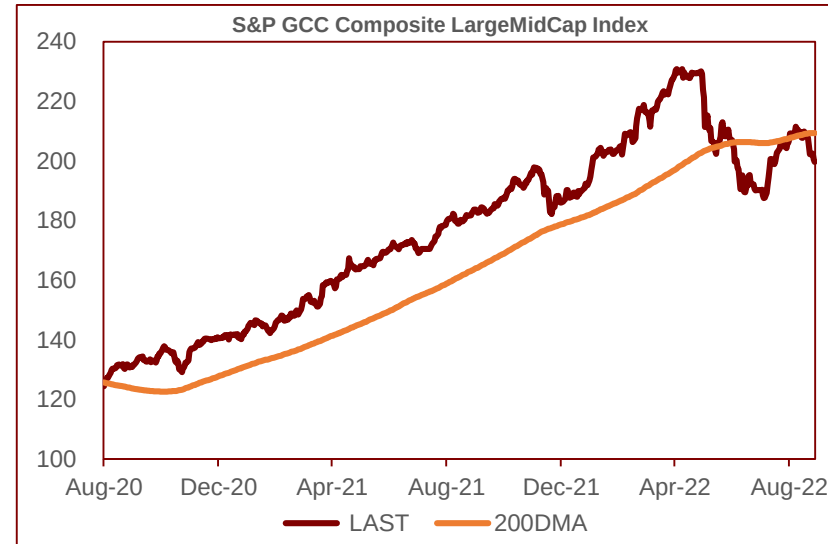
Emerging Markets

MSCI EM Index	965.24	-0.26	-1.12	-2.90	-3.54	-21.65			
China (SSE Composite)	3,243.45	1.36	1.84	1.29	-4.57	-10.89			
India (Sensex)	59,196.99	-0.08	0.73	-0.57	11.65	1.62			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Kuwait									
Kuwait All Share Index	7,615.23	0.61	-0.38	-1.22	2.79	8.12	45.48 KWD	2.34	22.27
Kuwait Premier Index	8,489.17	0.73	-0.44	-1.23	2.98	11.13	35.03 KWD	2.50	23.67
Kuwait Main Index	5,799.14	0.16	-0.16	-1.18	2.08	-1.48	10.45 KWD	1.82	17.59
NIC 50	9,562.36	0.22	-0.45	-1.24	2.97	12.20	28.60 KWD	2.48	22.67

Kuwait Sector

Banking	1,841.45	0.63	-0.35	-1.04	3.40	13.48	27.54 KWD	1.34	24.67
Telecom	1,223.41	0.10	-1.39	-2.12	1.12	12.30	3.76 KWD	1.02	13.00
Industrials	1,179.77	0.63	-0.81	-2.77	1.35	3.35	4.18 KWD	0.87	12.23
Financial services	1,418.12	1.64	0.20	-0.62	3.38	-0.37	3.71 KWD	0.77	14.81
Real estate	1,259.27	0.85	0.07	-0.66	4.49	-5.06	2.72 KWD	0.67	28.53
Basic materials	997.20	-0.12	-0.48	-1.25	-1.55	-2.69	0.89 KWD	1.35	11.12
Health care	420.41	-8.75	-0.43	-2.80	-11.69	-47.25	0.21 KWD	2.28	10.26
Consumer services	524.99	-0.19	-0.26	-1.74	-0.45	-28.19	0.80 KWD	0.97	11.06
Insurance	1,572.75	-0.53	-0.67	-0.15	1.96	2.57	0.66 KWD	0.81	8.02
Consumer Disc	1,529.77	0.55	0.29	0.17	2.75	14.45	0.16 KWD	1.03	21.51
Energy	1,118.36	2.28	1.39	-6.80	-4.26	-21.69	0.23 KWD	0.84	12.34
Technology	625.65	3.62	-1.15	2.99	-10.42	-8.51	0.01 KWD	0.76	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

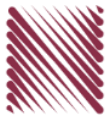
OPEC+'s decision to implement a small production output cut is more of a political statement and symbolic message sent by the alliance, Brent Crude stands around \$95 per barrel

Kuwait Market

The market closed up today by + 0.61% at 7,615.23 value traded 36.3 million KD, Premier market value traded reached 25.8 million KD and closed at 8,489.17 up by + 0.73%.

Saudi Market

The Market closed down today by -0.87%, KSA Market closed up as oil prices are relatively stable. And listed companies start declaration their positive semiannual financial performance.

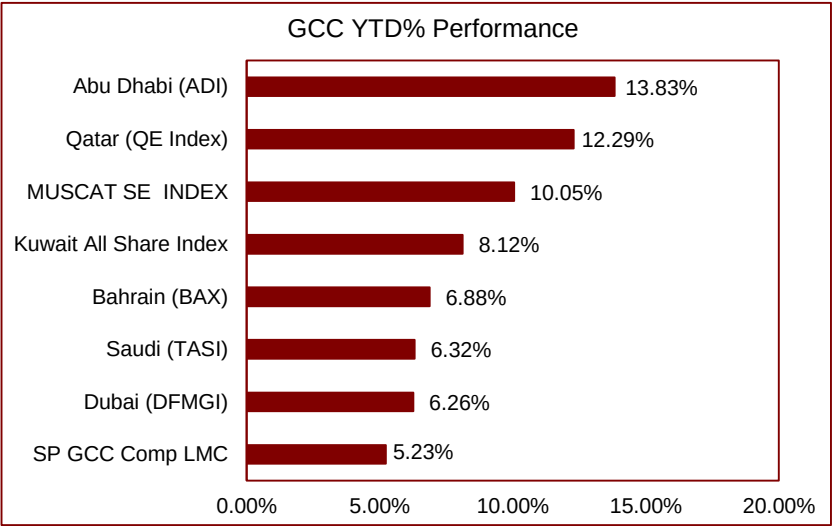


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.036	1.47	-0.38	-1.71	-0.67	9.11	7.84 KWD	2.01	27.00
KFH	0.893	0.22	-0.78	-0.78	2.53	18.06	8.31 KWD	3.82	32.00
Zain	0.593	0.00	-1.17	-1.98	-0.17	-0.34	2.57 KWD	2.16	13.00
BOUBYAN BANK	0.824	0.49	-0.96	-1.32	6.60	15.67	3.09 KWD	3.32	34.00
Agility	0.811	1.12	-0.98	-3.68	-0.25	2.98	2.17 KWD	1.39	2.57
Saudi Arabia									
ARAMCO	37.15	-0.93	0.13	-0.93	-4.25	14.15	8,171.48 SAR	6.28	15.60
SABIC	99.90	-0.10	0.91	-0.30	-1.67	-13.88	299.64 SAR	1.66	35.00
STC	40.05	-0.99	-1.11	-4.19	3.12	-10.92	200.21 SAR	2.79	17.70
AL-RAJHI BANK	86.40	-1.59	-2.81	-4.21	4.73	-2.51	345.54 SAR	4.22	23.98
NCB	67.60	0.60	-1.17	-3.29	2.58	4.97	302.66 SAR	1.86	17.07
United Arab Emirates									
ETISALAT.AD	24.16	-1.39	-3.82	-6.07	-7.43	-23.79	210.11 AED	4.46	22.44
FAB.AD	18.26	-0.44	-1.51	-4.40	-2.77	-1.95	201.73 AED	1.81	13.58
EMIRATES NBD	13.00	1.96	-0.38	-2.62	-1.52	-4.06	82.12 AED	0.96	8.82
DB ISLAMIC BK	5.86	2.09	0.17	0.17	1.74	8.92	42.43 AED	1.08	8.86
EMAAR PROPERT	6.12	1.32	-1.29	-2.24	17.69	25.15	50.06 AED	0.79	6.78
Qatar									
QNB	19.75	0.77	-1.25	-4.31	-1.15	-2.18	182.27 QAR	1.80	14.65
INDUSTRIES QAT	18.23	1.56	2.24	0.44	14.29	17.69	110.20 QAR	2.84	11.05
QA ISLAMIC BK	24.52	0.08	-1.53	-4.26	10.20	33.77	57.89 QAR	2.29	16.19
MASRAF AL RAYA	4.35	-0.50	-2.31	-3.85	5.25	-6.31	40.39 QAR	1.69	21.75
MESAIEED PETRO	2.46	-1.20	-3.87	-5.38	-1.20	17.70	30.88 QAR	1.85	15.53
OMAN									
BANK MUSCAT	0.598	0.34	-0.33	-0.99	13.26	29.73	2.24 OMR	1.05	8.33
OMANTEL	0.912	2.70	-2.56	-0.87	4.59	21.28	0.68 OMR	1.18	7.69
BANK DHOFAR	0.131	-2.96	-2.96	-2.96	11.97	3.97	0.39 QAR	0.56	14.93
NAT BANK OF OMAN	0.265	-1.85	-1.85	-1.85	26.19	34.52	0.43 QAR	0.76	12.71
OMINVEST	0.330	0.00	-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, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is up today by + 0.61 %The leading sector best performance indices today are Technology 3.62 % Energy 2.28 % Financial services 1.64 % respectively

KSA
Saudi Armco has a negative performance today by -0.93 %, SABIC has a negative performance today by -0.10 %, STC has a negative performance today by -0.99 %, Al Rajhi Bank has a negative performance today by -1.59 %

UAE
ETISALAT .AD has a negative performance today by -1.39 %, FAB.AD has a negative performance today by -0.44 %



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