



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, September 8th 2022





Market Watch

Thursday, September 8, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,834.26	-0.25	-2.54	-3.66	2.70	4.90	11,100 SAR	2.02	17.68
Qatar (QE Index)	12,948.92	-0.05	-1.78	-3.55	6.21	11.38	646 QAR	1.53	14.79
Dubai (DFMGI)	3,360.83	-0.68	-1.62	-2.43	4.22	5.11	453 AED	1.42	13.72
Abu Dhabi (ADI)	9,795.86	0.70	0.68	-0.90	4.39	15.29	1,435 AED	2.10	26.98
Bahrain (BAX)	1,928.15	0.17	0.28	0.53	4.81	7.28	20 BHD	1.76	11.59
MUSCAT SE INDEX	4,512.78	-0.21	-2.00	-1.58	9.47	9.28	5 OMR	0.97	13.25
SP GCC Comp LMC	197.29	-0.39	-2.52	-3.85	2.44	3.93			
SP UAE PRICE INDEX	140.19	-0.77	-2.24	-4.11	-0.93	-5.04			

Developed Markets

MSCI World Index	2,682.90	0.84	0.99	0.34	3.53	-18.43			
U.S. (S&P 500)	4,067.36	0.66	0.99	1.29	5.83	-15.95			
U.K. (FTSE 100)	7,351.07	0.33	1.59	-0.30	1.29	-1.66			
Japan (Topix)	1,965.53	2.19	1.14	-0.28	4.64	-1.74			

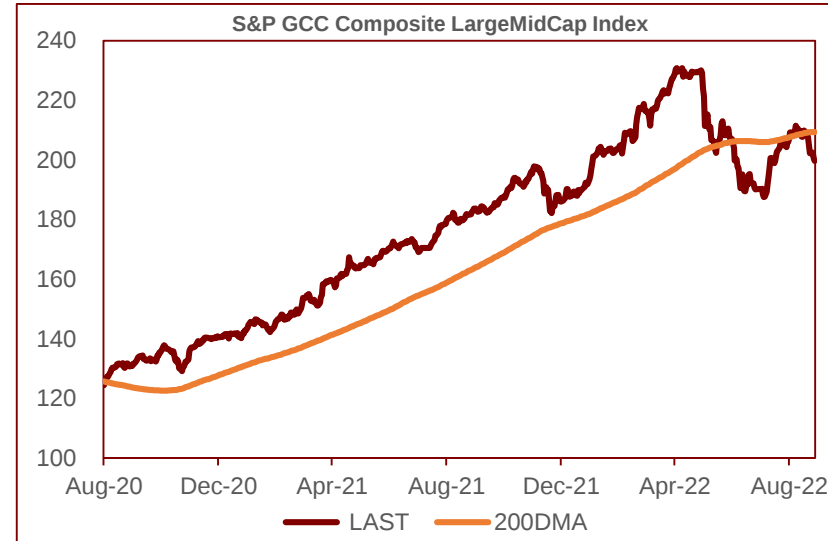
Emerging Markets

MSCI EM Index	970.29	0.07	-1.94	-3.71	-4.34	-22.30			
China (SSE Composite)	3,262.05	-0.33	1.59	1.04	-4.80	-11.10			
India (Sensex)	59,793.14	1.12	1.57	0.25	12.58	2.46			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,555.10	-0.25	-1.17	-2.00	1.98	7.27	45.04 KWD	2.32	22.01
Kuwait Premier Index	8,420.52	-0.31	-1.25	-2.03	2.15	10.23	34.68 KWD	2.48	23.38
Kuwait Main Index	5,757.40	-0.02	-0.87	-1.89	1.35	-2.19	10.36 KWD	1.79	17.44
NIC 50	9,497.13	-0.18	-1.26	-2.04	2.14	11.44	28.60 KWD	2.46	22.38

Kuwait Sector

Banking	1,823.98	-0.24	-1.30	-1.98	2.42	12.40	27.22 KWD	1.34	24.38
Telecom	1,214.33	-0.42	-2.12	-2.85	0.37	11.47	3.72 KWD	1.02	12.89
Industrials	1,172.20	-0.73	-1.44	-3.40	0.70	2.69	4.14 KWD	0.87	12.22
Financial services	1,400.82	-0.34	-1.03	-1.83	2.12	-1.58	3.67 KWD	0.77	13.81
Real estate	1,262.94	0.59	0.36	-0.37	4.79	-4.79	2.72 KWD	0.67	28.33
Basic materials	1,002.07	0.06	0.01	-0.76	-1.07	-2.22	0.89 KWD	1.35	11.16
Health care	420.41	0.00	-0.43	-2.80	-11.69	-47.25	0.21 KWD	2.28	10.26
Consumer services	519.51	0.40	-1.30	-2.76	-1.49	-28.94	0.78 KWD	0.96	10.96
Insurance	1,585.36	-0.02	0.13	0.65	2.77	3.39	0.66 KWD	0.83	8.02
Consumer Disc	1,513.71	-0.30	-0.76	-0.88	1.67	13.25	0.16 KWD	1.03	21.20
Energy	1,126.11	-0.01	2.09	-6.15	-3.60	-21.15	0.23 KWD	0.85	12.03
Technology	640.20	0.00	1.15	5.39	-8.33	-6.38	0.01 KWD	0.77	0.00
Utilities	539.47	-0.49	1.48	1.99	-0.97	-10.09	0.23 KWD	2.31	15.70



What Move the GCC markets

Oil Prices

Oil prices fell slightly on Thursday after dropping below key technical support levels in the previous session, as traders weighed an energy standoff between Europe and Russia and its implications on supply.

Brent crude futures traded 40 cents lower, or 0.5%, to \$87.60 per barrel

Kuwait Market

The market closed down today by – 0.25% at 7,555.10 value traded 47.3 million KD. Premier market value traded reached 34.8 million KD and closed at 8,420.52 down by – 0.31%.

Saudi Market

The Market closed down today by -0.25%, listed companies start declaration their positive semiannual financial performance.

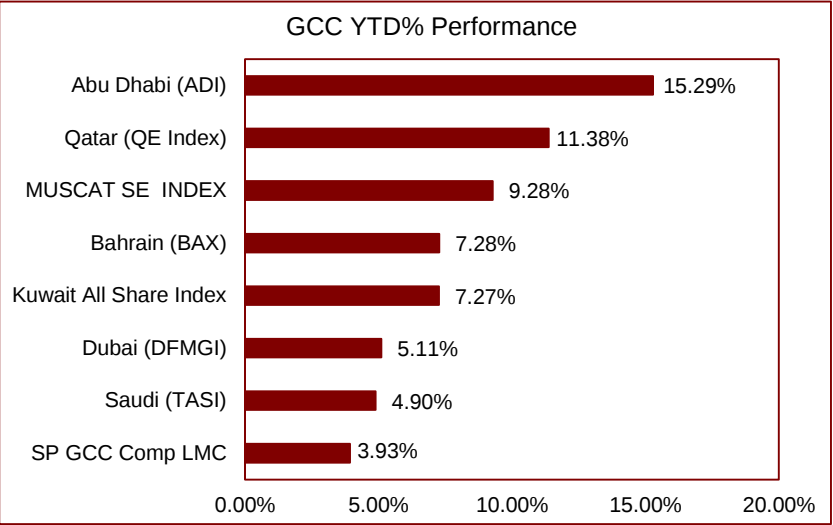


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.030	-0.58	-0.96	-2.28	-1.25	8.48	7.78 KWD	2.00	27.00
KFH	0.884	0.11	-1.78	-1.78	1.49	16.87	8.21 KWD	3.79	32.00
Zain	0.588	-0.34	-2.00	-2.81	-1.01	-1.18	2.54 KWD	2.14	12.89
BOUBYAN BANK	0.808	-0.49	-2.88	-3.23	4.53	13.43	3.02 KWD	3.26	34.00
Agility	0.807	-1.10	-1.47	-4.16	-0.74	2.48	2.16 KWD	1.38	2.55
Saudi Arabia									
ARAMCO	36.55	-0.95	-1.48	-2.53	-5.80	12.30	8,042.71 SAR	6.18	15.35
SABIC	97.80	-0.41	-1.21	-2.40	-3.74	-15.69	293.46 SAR	1.62	35.00
STC	39.80	-0.13	-1.73	-4.78	2.47	-11.48	199.04 SAR	2.77	17.44
AL-RAJHI BANK	85.70	0.00	-3.60	-4.99	3.88	-3.30	342.87 SAR	4.18	23.40
NCB	66.20	-1.93	-3.22	-5.29	0.46	2.80	296.51 SAR	1.82	17.14
United Arab Emirates									
ETISALAT.AD	23.36	-2.18	-7.01	-9.18	-10.50	-26.31	205.06 AED	4.35	21.70
FAB.AD	18.40	0.00	-0.76	-3.66	-2.02	-1.19	203.26 AED	1.82	13.68
EMIRATES NBD	12.95	-2.26	-0.77	-3.00	-1.89	-4.43	81.16 AED	0.95	8.78
DB ISLAMIC BK	5.78	-1.03	-1.20	-1.20	0.35	7.43	41.92 AED	1.07	8.74
EMAAR PROPERT	6.02	0.17	-2.90	-3.83	15.77	23.11	49.57 AED	0.78	6.67
Qatar									
QNB	19.50	-1.91	-2.50	-5.52	-2.40	-3.42	180.21 QAR	1.77	14.46
INDUSTRIES QAT	17.81	-0.67	-0.11	-1.87	11.66	14.98	107.81 QAR	2.77	10.79
QA ISLAMIC BK	24.50	0.37	-1.61	-4.33	10.11	33.66	57.92 QAR	2.29	16.17
MASRAF AL RAYA	4.30	-0.39	-3.28	-4.80	4.21	-7.24	40.05 QAR	1.68	21.53
MESAIEED PETRO	2.43	0.75	-5.04	-6.54	-2.41	16.27	30.55 QAR	1.83	15.34
OMAN									
BANK MUSCAT	0.592	-0.34	-1.33	-1.99	12.12	28.43	2.22 OMR	1.04	8.33
OMANTEL	0.928	4.50	-0.85	0.87	6.42	23.40	0.70 OMR	1.20	7.69
BANK DHOFAR	0.130	0.00	-3.70	-3.70	11.11	3.17	0.39 QAR	0.56	14.93
NAT BANK OF OMAN	0.260	-1.89	-3.70	-3.70	23.81	31.98	0.42 QAR	0.75	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
31-August 22	23.78%	16.45%	0.06%	1.23%	0.39%	5.85%	17.68%	11.36%	5.77%	4.01%
7-September 22	23.72%	16.43%	0.06%	1.24%	0.38%	5.83%	17.70%	11.37%	5.71%	4.04%

End of Report
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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is down today by -0.25 %The leading sector bottom performance indices today are Industrials -0.73 % Utilities -0.49 % Telecom -0.42 % respectively.

KSA
Saudi Armco has a negative performance today by -0.95 %, SABIC has a negative performance today by -0.41 %, STC has a negative performance today by -0.13 %, Al Rajhi Bank flat performance today.

UAE
ETISALAT .AD has a negative performance today by -2.18 %, FAB.AD has a flat performance today.



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