



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, January 03, 2022



DAILY MARKETS WRAP,

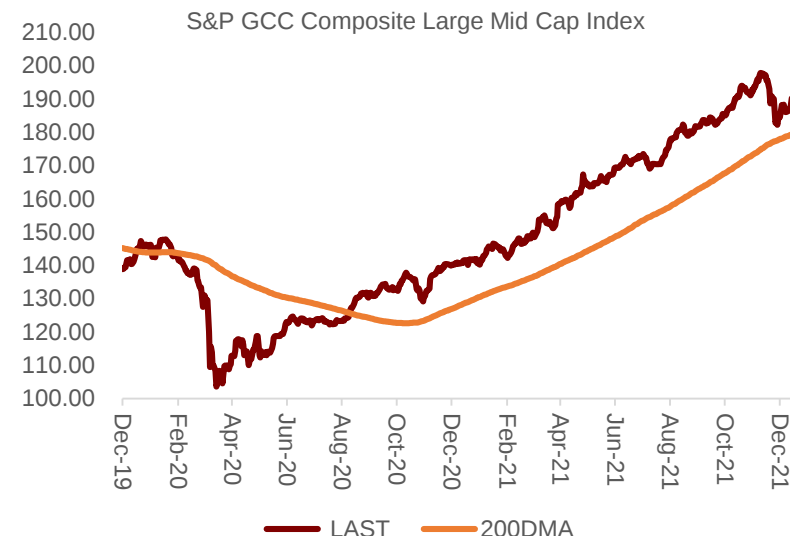
NIC RESEARCH AND STUDIES DEP



Market Watch

03 January 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,327.52	0.0	0.41	0.41	0.41	0.41	9,992 SAR	2.39	17.31
Qatar (QE Index)	11,670.10	0.38	0.38	0.38	0.38	0.38	591 QAR	1.66	15.86
Dubai (DFMGI)	3,190.97	-0.15	-0.15	-0.15	-0.15	-0.15	321 AED	1.57	24.95
Abu Dhabi (ADI)	8,464.57	-0.28	0.39	-0.96	9.95	-0.28	1,459 AED	1.85	15.75
Bahrain (BAX)	1,792.24	-0.28	-0.28	-0.28	-0.28	-0.28	18 BHD	1.52	9.98
MUSCAT SE INDEX	4,172.14	1.03	1.03	1.03	1.03	1.03	5 OMR	0.89	13.25
SP GCC Comp LMC	190.33	0.50	0.50	0.50	0.50	0.50			
Developed Markets									
MSCI World Index	3,231.73	-0.16	0.00	0.00	0.00	0.00			
U.S. (S&P 500)	4,766.18	0.33	0.85	4.36	10.65	26.89			
U.K. (FTSE 100)	7,384.54	-0.25	0.00	0.00	0.00	0.00			
Japan (Topix)	1,992.33	NA	NA	NA	NA	NA			
Emerging Markets									
MSCI EM Index	1,232.01	0.12	0.12	0.12	0.12	0.12			
China (SSE Composite)	3,639.78	NA	NA	NA	NA	NA			
India (Sensex)	59,183.22	1.60	1.60	1.6	1.6	1.6			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,051.20	0.11	0.11	0.11	0.11	0.11	41.87 KWD	2.09	26.14
Kuwait Permier Index	7,653.60	0.19	0.19	0.19	0.19	0.19	31.35 KWD	2.24	26.40
Kuwait Main Index	5,879.55	-0.11	-0.11	-0.11	-0.11	-0.11	10.52 KWD	1.62	25.47
NIC 50	8,522.47	0.11	0.11	0.11	0.11	0.11	30.45 KWD	1.86	29.52
Kuwait Sector									
Banking	1,626.88	0.25	0.25	0.25	0.25	0.25	24.21 KWD	1.29	27.40
Telecom	1,093.86	0.41	0.41	0.41	0.41	0.41	3.35 KWD	0.91	15.02
Industrials	1,141.53	0.00	0.00	0.00	0.00	0.00	4.05 KWD	0.86	13.76
Financial services	1,420.90	-0.17	-0.17	-0.17	-0.17	-0.17	3.65 KWD	0.84	12.89
Real estate	1,317.18	-0.70	-0.70	-0.70	-0.70	-0.70	2.84 KWD	0.74	51.39
Basic materials	1,025.35	0.06	0.06	0.06	0.06	0.06	0.91 KWD	1.91	27.11
Health care	798.48	0.18	0.18	0.18	0.18	0.18	0.40 KWD	6.16	12.03
Consumer services	727.66	-0.47	-0.47	-0.47	-0.47	-0.47	0.69 KWD	0.88	15.18
Insurance	1,533.36	0.00	0.00	0.00	0.00	0.00	0.64 KWD	0.78	8.53
Consumer Disc	1,342.52	0.44	0.44	0.44	0.44	0.44	0.22 KWD	1.34	8.90
Energy	1,420.60	-0.53	-0.53	-0.53	-0.53	-0.53	0.30 KWD	1.03	14.97
Technology	667.84	-2.34	-2.34	-2.34	-2.34	-2.34	0.01 KWD	0.79	0.00
Utilities	594.74	0.00	-0.88	-0.88	-0.88	-0.88	0.25 KWD	4.01	19.37



What Move the GCC markets

Oil Prices

Oil dips below \$78 as early 2022 rally peters out

Oil slipped below \$78 a barrel on Monday as OPEC+ looked set to agree to a further oil output increase and concern persisted about the demand impact of rising coronavirus cases, despite hopes of a further recovery in 2022. OPEC and its allies, or OPEC+, are expected on Tuesday to agree to the output hike.

Kuwait Market

The market closed today up by 0.11%, closed at 7,051.2 value traded 21.9 million KD, Premier market value traded reached 13.1 million KD and closed at 7,653.6 up by 0.19%

Saudi Market

The Market closed down today by -0.03%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,
NIC RESEARCH AND STUDIES DEP



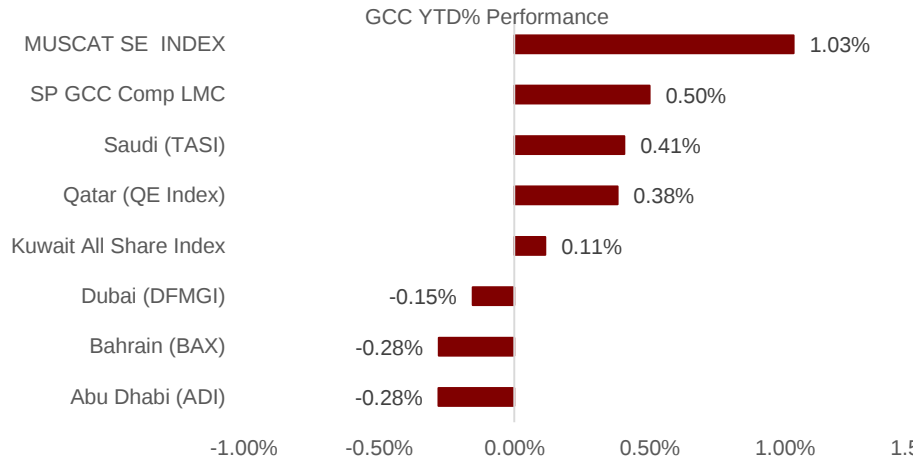
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.000	0.30	0.30	0.30	0.30	0.30	7.19 KWD	1.85	27.00
KFH	0.834	0.24	0.24	0.24	0.24	0.24	7.04 KWD	3.24	32.00
Zain	0.598	0.50	0.50	0.50	0.50	0.50	2.59 KWD	2.18	13.62
BOUBYAN BANK	0.797	0.89	0.89	0.89	0.89	0.89	2.53 KWD	3.61	34.00
Agility	0.948	0.32	0.32	0.32	0.32	0.32	2.11 KWD	0.97	2.01
Saudi Arabia									
ARAMCO	35.60	0.14	-0.56	-0.56	-0.56	-0.56	7,110.00 SAR	6.65	21.66
SABIC	116.40	-0.17	0.34	0.34	0.34	0.34	349.80 SAR	2.01	35.00
STC	112.00	0.54	-0.36	-0.36	-0.36	-0.36	222.80 SAR	3.25	19.90
AL-RAJHI BANK	142.20	-0.70	0.28	0.28	0.28	0.28	358.00 SAR	5.63	25.59
NCB	65.70	1.39	2.17	2.17	2.17	2.17	290.17 SAR	1.80	18.68
United Arab Emirates									
ETISALAT.AD	31.60	-0.32	-0.32	-0.32	-0.32	-0.32	275.69 AED	5.98	29.87
FAB.AD	18.88	0.21	0.21	0.21	0.21	0.21	205.73 AED	1.88	16.93
EMIRATES NBD	13.60	0.37	0.37	0.37	0.37	0.37	85.59 AED	1.00	10.73
DB ISLAMIC BK	5.42	0.74	0.74	0.74	0.74	0.74	38.96 AED	1.02	14.35
EMAAR PROPERT	4.88	-0.20	-0.20	-0.20	-0.20	-0.20	40.00 AED	0.61	12.69
Qatar									
QNB	20.18	0.45	-0.59	-0.59	-0.59	-0.59	186.39 QAR	1.86	15.76
INDUSTRIES QAT	15.40	0.85	-1.03	-1.03	-1.03	-1.03	93.17 QAR	2.49	13.87
QA ISLAMIC BK	18.20	0.55	-0.76	-0.76	-0.76	-0.76	43.01 QAR	1.80	13.50
MASRAF AL RAYA	4.86	0.39	4.42	4.42	4.42	4.42	45.19 QAR	2.46	16.30
MESAIEED PETRO	2.19	2.57	4.74	4.74	4.74	4.74	27.55 QAR	1.65	16.38
OMAN									
BANK MUSCAT	0.500	1.22	3.31	3.31	3.31	3.31	1.79 OMR	0.85	8.33
OMANTEL	0.768	2.13	2.13	2.13	2.13	2.13	0.57 OMR	1.01	7.69
BANK DHOFAR	0.128	2.40	1.59	1.59	1.59	1.59	0.38 QAR	0.54	14.93
NAT BANK OF OMAN	0.196	0.00	-0.51	-0.51	-0.51	-0.51	0.32 QAR	0.58	12.71
OMINVEST	0.320	4.58	4.58	4.58	4.58	4.58	0.26 QAR	0.94	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
22-Dec-21	20.67%	12.17%	0.06%	0.28%	0.41%	4.48%	2.74%	10.37%	5.27%	4.56%
29-Dec-21	20.76%	12.46%	0.06%	0.38%	0.41%	4.48%	2.68%	10.34%	5.23%	4.57%

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 today up by 0.11%, and closed at 7,051.2 value traded 21.9 million KD, Premier market value traded reached 13.1 million KD and closed at 7,653.6 up by 0.19%. Leading by Telecom +0.41% , Banking +0.25%.

KSA

Saudi Armco has a positive performance today by 0.28%, SABIC closed up today by 0.17%

STC has a positive performance today by 0.9%, Al Rajhi Bank has negative performance by – 0.28%.

UAE

ETISALAT AD closed up today by 2.26%, and act defensively with COVID19



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