



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

March 1st, 2022





Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,674.3	0.67	3.06	0.67	12.34	12.34	11,489 SAR	2.47	18.46
Qatar (QE Index)	13,272.4	2.50	5.01	2.50	14.16	14.16	674 QAR	1.77	16.57
Dubai (DFMGI)	3,397.6	1.28	2.58	1.28	6.31	6.31	335 AED	1.48	20.90
Abu Dhabi (ADI)	9,521.3	2.17	4.36	2.17	12.17	12.17	1,435 AED	1.80	33.58
Bahrain (BAX)	1,968.5	0.25	1.27	0.25	9.53	9.53	20 BHD	1.18	17.14
MUSCAT SE INDEX	4,055.42	0.67	0.46	-1.47	-1.79	-1.79	5 OMR	0.87	13.25
SP GCC Comp LMC	214.33	1.28	3.72	1.29	12.95	12.95			

Developed Markets

MSCI World Index	2,930.76	-1.58	-1.66	-1.58	-9.31	-9.31			
U.S. (S&P 500)	4,306.26	0.33	-1.79	-1.55	-9.65	-9.65			
U.K. (FTSE 100)	7,330.20	-1.72	-2.13	-1.72	-0.74	-0.74			
Japan (Topix)	1,862.74	-1.81	-0.73	-1.29	-6.51	-6.51			

Emerging Markets

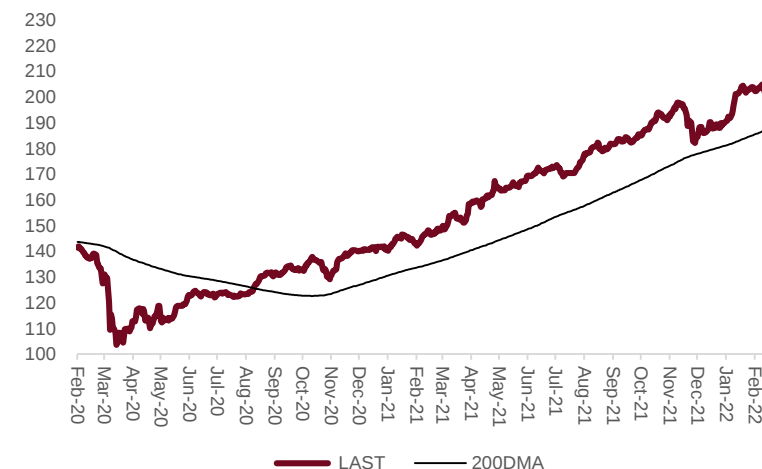
MSCI EM Index	1,176.43	0.44	0.38	0.44	-4.51	-4.51			
China (SSE Composite)	3,481.29	-0.22	0.85	0.53	-4.37	-4.37			
India (Sensex)	55,402.97	-1.50	-0.82	-1.50	-4.89	-4.89			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,637.55	-0.31	0.11	3.91	8.44	8.44	45.47 KWD	2.27	28.50
Kuwait Premier Index	8,320.27	-0.02	0.57	3.84	8.92	8.92	34.21 KWD	2.42	27.94
Kuwait Main Index	6,291.02	-1.21	-1.35	4.01	6.88	6.88	11.26 KWD	1.79	30.25
NIC 50	9,211.22	-0.17	1.14	3.36	8.08	8.08	28.60 KWD	2.40	26.94

Kuwait Sector

Banking	1,756.58	0.00	0.46	3.17	8.25	8.25	26.26 KWD	1.32	28.94
Telecom	1,217.31	-0.39	-2.92	10.85	11.74	11.74	3.74 KWD	0.94	14.60
Industrials	1,266.88	-0.66	0.81	6.78	10.98	10.98	4.50 KWD	1.03	15.73
Financial services	1,576.59	-0.93	1.39	3.83	10.77	10.77	4.02 KWD	0.93	26.87
Real estate	1,347.35	-0.71	-0.08	-0.20	1.58	1.58	2.91 KWD	0.70	50.12
Basic materials	1,131.56	-0.31	-1.06	1.78	10.42	10.42	1.01 KWD	1.91	29.14
Health care	812.74	0.00	-0.25	0.73	1.97	1.97	0.40 KWD	6.16	13.19
Consumer services	722.04	-0.56	1.26	-0.29	-1.24	-1.24	0.79 KWD	0.92	14.41
Insurance	1,613.92	-0.37	-1.99	5.61	5.25	5.25	0.68 KWD	0.80	8.49
Consumer Disc	1,544.03	-2.59	-2.95	7.64	15.52	15.52	0.22 KWD	1.31	8.90
Energy	1,371.71	-0.82	-1.32	-4.99	-3.95	-3.95	0.29 KWD	1.00	15.03
Technology	691.13	-4.90	-0.10	-8.65	1.06	1.06	0.01 KWD	0.82	0.00
Utilities	581.58	-0.45	-0.90	-1.34	-3.07	-3.07	0.24 KWD	3.92	18.78

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

U.S. oil climbed to the highest level since 2013 during overnight trading Tuesday, with global benchmark Brent topping \$110 per barrel as crude's blistering rally continues. The advance comes as OPEC and its oil-producing allies, which includes Russia, prepare to meet Wednesday to discuss April's output.

Kuwait Market

The market closed today down by - 0.31%, closed at 7,637.55 value traded 111.8 million KD, Premier market value traded reached 88.4 million KD and closed at 8,320.27 down by - 0.02%.

Saudi Market

The Market closed up today by +0.67%, and linked to impressive Oil performance .

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



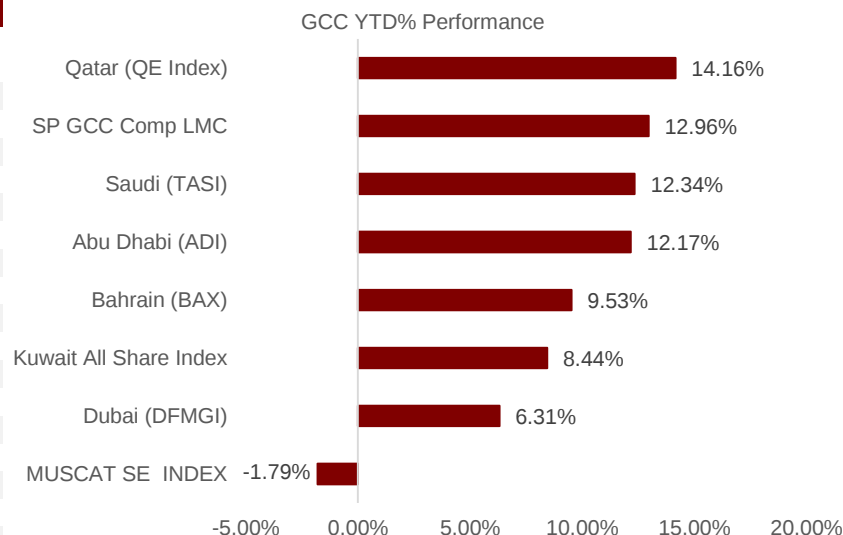
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.055	0.38%	-0.28	1.83	5.82	5.82	7.60 KWD	1.91	27.00
KFH	0.944	0.43%	1.18	4.19	13.46	13.46	7.99 KWD	3.66	32.00
Zain	0.620	0.16%	-1.59	3.51	4.20	4.20	2.69 KWD	2.26	14.45
BOUBYAN BANK	0.823	0.86%	0.37	2.11	4.18	4.18	2.62 KWD	3.67	34.00
Agility	1.016	-0.20%	-1.84	1.20	7.51	7.51	2.27 KWD	1.04	2.16
Saudi Arabia									
ARAMCO	41.45	-0.24	0.24	-0.24	15.78	15.78	8,290.22 SAR	7.75	25.14
SABIC	129.00	3.53	7.14	3.53	11.21	11.21	387.01 SAR	2.22	35.00
STC	115.00	0.88	3.23	0.88	2.31	2.31	230.01 SAR	3.32	20.14
AL-RAJHI BANK	160.00	-0.25	3.23	-0.25	12.84	12.84	400.01 SAR	5.94	27.19
NCB	67.50	-1.03	-1.75	-1.03	4.81	4.81	302.27 SAR	1.85	19.71
United Arab Emirates									
ETISALAT.AD	35.00	0.06	5.17	0.06	10.41	10.41	304.39 AED	6.40	32.67
FAB.AD	22.02	6.48	8.26	6.48	16.88	16.88	240.46 AED	2.13	19.74
EMIRATES NBD	14.50	1.40	4.32	1.40	7.01	7.01	91.59 AED	1.10	10.51
DB ISLAMIC BK	6.15	0.99	1.99	0.99	14.31	14.31	44.53 AED	1.14	11.66
EMAAR PROPERT	5.17	1.77	4.23	1.77	5.73	5.73	42.29 AED	0.65	9.94
Qatar									
QNB	23.30	6.88	12.02	6.88	15.40	15.40	214.87 QAR	2.18	17.62
INDUSTRIES QAT	18.60	1.64	5.08	1.64	20.08	20.08	112.35 QAR	2.85	13.91
QA ISLAMIC BK	22.05	4.55	6.52	4.55	20.29	20.29	52.02 QAR	2.11	15.51
MASRAF AL RAYA	5.10	2.00	4.70	2.00	9.91	9.91	47.36 QAR	1.94	22.27
MESAIEED PETRO	2.70	1.09	3.13	1.09	29.14	29.14	33.85 QAR	1.99	18.21
OMAN									
BANK MUSCAT	0.520	-0.38	0.39	0.00	7.44	7.44	1.86 OMR	0.86	8.33
OMANTEL	0.808	0.00	1.00	2.54	7.45	7.45	0.61 OMR	1.08	7.69
BANK DHOFAR	0.111	-2.63	-4.31	-6.72	-11.90	-11.90	0.33 QAR	0.47	14.93
NAT BANK OF OMAN	0.186	2.76	1.64	-1.59	-5.58	-5.58	0.30 QAR	0.55	12.71
OMINVEST	0.314	0.00	7.53	3.29	2.61	2.61	0.21 QAR	0.92	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
16-Feb-22	20.95%	12.38%	0.06%	0.46%	0.40%	5.76%	2.48%	10.34%	5.25%	4.28%
23-Feb-22	21.08%	12.35%	0.06%	0.48%	0.40%	5.99%	2.48%	10.45%	5.25%	4.29%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.31 % The leading sector bottom performance indices today are Technology -4.9 % Consumer Disc -2.59 % Financial services -0.93 % respectively

Telecommunication sector are down today by -0.39 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 3.45 %

KSA

Saudi Armco has a negative performance today by -0.24%, SABIC have positive performance today by 3.53%

STC have positive performance today by +3.53%, Al Rajhi Bank have positive performance today by 0.88%

UAE

ETISALAT AD closed flat today, and act defensively with COVID19



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