



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, March 2, 2022





Market Watch

Thursday, March 3, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	12,756.31	0.80	3.73	1.32	13.07	13.07	11,806 SAR	2.43	18.69
Qatar (QE Index)	13,463.02	0.24	6.06	3.52	15.30	15.80	688 QAR	1.78	16.73
Dubai (DFMGI)	3,482.03	0.41	5.12	3.80	8.95	8.95	342 AED	1.47	20.94
Abu Dhabi (ADI)	9,745.36	0.67	6.82	4.57	14.81	14.81	1,435 AED	1.81	33.54
Bahrain (BAX)	1,976.05	0.34	1.66	0.63	9.95	9.95	20 BHD	1.18	17.35
MUSCAT SE INDEX	4,134.06	1.88	2.41	1.94	0.11	0.11	5 OMR	0.87	13.25
SP GCC Comp LMC	215.81	0.68	4.43	1.99	13.73	14.62			

Developed Markets

MSCI World Index	2,964.24	1.14	-0.54	-0.46	-8.28	-8.28			
U.S. (S&P 500)	4,386.54	0.33	0.04	0.29	-7.97	-7.97			
U.K. (FTSE 100)	7,380.97	-0.65	-1.45	-1.03	-0.05	-0.05			
Japan (Topix)	1,881.80	1.18	0.30	-0.27	-5.55	-5.55			

Emerging Markets

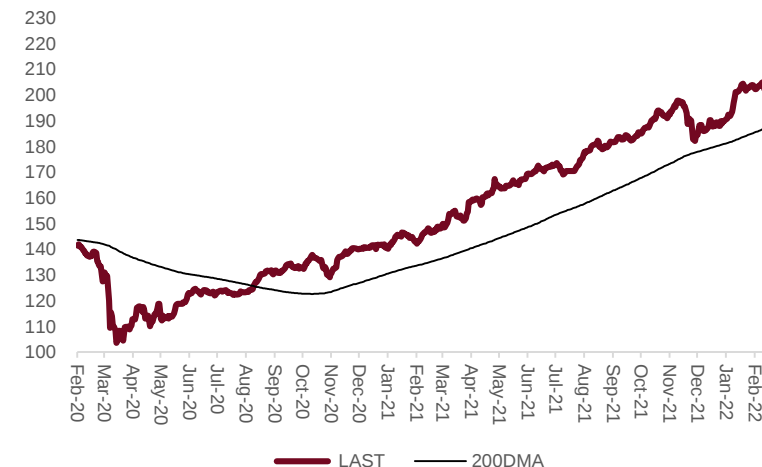
MSCI EM Index	1,168.41	-0.68	-0.31	-0.25	-5.16	-5.16			
China (SSE Composite)	3,481.11	-0.09	0.86	0.54	-4.36	-4.36			
India (Sensex)	55,102.68	-0.66	-1.30	-1.98	-5.36	-5.36			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,850.58	0.66	2.79	2.79	11.46	11.46	46.28 KWD	2.32	29.26
Kuwait Premier Index	8,599.39	0.84	3.20	3.20	12.57	12.57	34.92 KWD	2.48	28.69
Kuwait Main Index	6,351.65	0.04	0.93	0.93	7.91	7.91	11.36 KWD	1.81	31.09
NIC 50	9,501.17	0.77	-0.61	2.32	11.48	11.48	28.60 KWD	2.46	27.69

Kuwait Sector

Banking	1,821.49	0.95	3.70	3.70	12.25	12.25	26.83 KWD	1.32	29.69
Telecom	1,246.74	1.00	2.42	2.42	14.45	14.45	3.79 KWD	0.94	14.77
Industrials	1,280.31	0.08	1.06	1.06	12.16	12.16	4.54 KWD	1.04	11.49
Financial services	1,608.01	0.28	1.99	1.99	12.98	12.98	4.09 KWD	0.93	27.17
Real estate	1,373.96	-0.32	1.98	1.98	3.58	3.58	2.98 KWD	0.71	50.04
Basic materials	1,146.75	1.01	1.34	1.34	11.90	11.90	1.01 KWD	1.89	29.26
Health care	812.74	0.00	0.00	0.00	1.97	1.97	0.40 KWD	6.16	13.19
Consumer services	731.27	1.28	1.28	1.28	0.02	0.02	0.80 KWD	0.92	14.53
Insurance	1,598.25	-0.50	-0.97	-0.97	4.23	4.23	0.67 KWD	0.80	8.69
Consumer Disc	1,540.58	-1.23	-0.22	-0.22	15.26	15.26	0.22 KWD	1.31	8.90
Energy	1,369.99	0.14	-0.13	-0.13	-4.07	-4.07	0.28 KWD	1.02	15.19
Technology	720.23	1.02	4.21	4.21	5.32	5.32	0.01 KWD	0.84	0.00
Utilities	592.11	0.00	1.81	1.81	-1.31	-1.31	0.25 KWD	3.95	18.95

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices extended their rally on Thursday, with Brent rising above \$116 a barrel, as trade disruption and shipping issues from Russian sanctions over the Ukraine crisis sparked supply worries while U.S. crude stocks fell to multi-year lows. The Organization of the Petroleum Exporting Countries and their allies including Russia have decided to maintain an increase in output by 400,000 barrels per day in March despite the price surge, ignoring the Ukraine crisis during their talks and snubbing calls from consumers for more crude

Kuwait Market

The market closed today up by 0.66%, closed at 7,850.58 value traded 93.9 million KD, Premier market value traded reached 68.2 million KD and closed at 8,599.39 up by +0.84%.

Saudi Market

The Market closed up today by + 0.80%, and linked to impressive Oil performance .

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



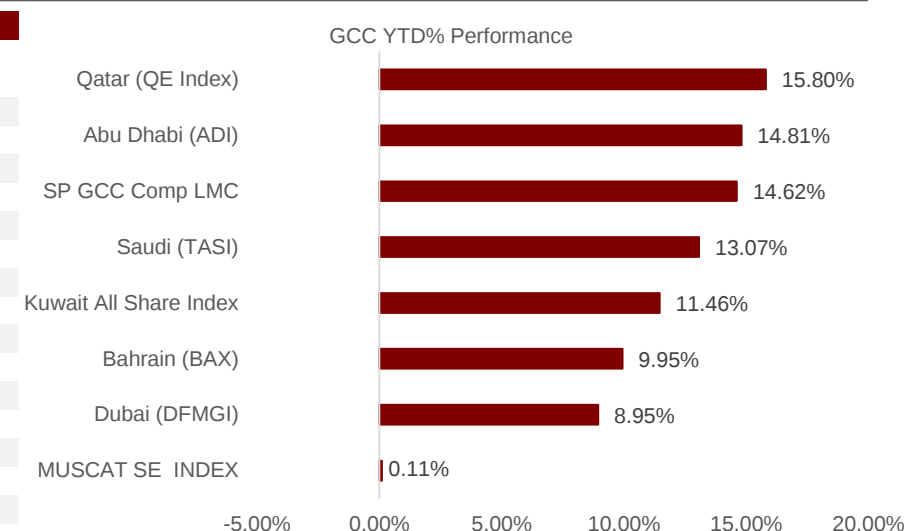
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.103	1.75	4.55	4.55	10.63	10.63	7.80 KWD	1.96	27.00
KFH	0.994	0.91	5.30	5.30	19.47	19.47	8.32 KWD	3.82	32.00
Zain	0.638	1.27	2.90	2.90	7.23	7.23	2.73 KWD	2.29	14.68
BOUBYAN BANK	0.832	0.48	1.09	1.09	5.32	5.32	2.63 KWD	3.69	34.00
Agility	1.031	0.29	1.48	1.48	9.10	9.10	2.29 KWD	1.05	2.19
Saudi Arabia									
ARAMCO	44.30	2.90	7.13	6.62	23.74	23.74	8,610.00 SAR	8.05	25.08
SABIC	135.00	0.90	12.13	8.35	16.38	16.38	401.40 SAR	2.31	35.00
STC	112.60	-1.40	1.08	-1.23	0.18	0.18	228.40 SAR	3.29	20.32
AL-RAJHI BANK	156.60	-0.13	1.03	-2.37	10.44	10.44	392.00 SAR	5.82	27.13
NCB	67.80	1.35	-1.31	-0.59	5.28	5.28	299.58 SAR	1.83	19.51
United Arab Emirates									
ETISALAT.AD	36.10	0.84	8.47	3.20	13.88	13.88	311.34 AED	6.54	33.42
FAB.AD	22.78	0.80	12.00	10.15	20.91	20.91	246.79 AED	2.19	20.26
EMIRATES NBD	15.50	2.31	11.51	8.39	14.39	14.39	95.70 AED	1.15	10.98
DB ISLAMIC BK	6.44	0.00	6.80	5.75	19.70	19.70	46.63 AED	1.20	12.21
EMAAR PROPERT	5.18	0.39	4.44	1.97	5.93	5.93	42.21 AED	0.65	9.92
Qatar									
QNB	23.50	-0.84	12.98	7.80	16.39	16.39	219.34 QAR	2.21	17.93
INDUSTRIES QAT	19.42	3.02	10.17	6.56	25.89	25.89	114.27 QAR	2.89	14.10
QA ISLAMIC BK	22.00	-0.36	5.89	3.94	19.59	19.59	52.28 QAR	2.11	15.53
MASRAF AL RAYA	5.12	-0.10	4.99	2.28	10.22	10.22	47.76 QAR	1.95	22.38
MESAIEED PETRO	2.91	-0.89	10.51	8.31	38.37	38.37	36.95 QAR	2.16	19.80
OMAN									
BANK MUSCAT	0.536	2.29	3.47	3.08	10.74	10.74	1.87 OMR	0.87	8.33
OMANTEL	0.828	1.47	3.00	1.98	9.57	9.57	0.61 OMR	1.09	7.69
BANK DHOFAR	0.114	2.70	-1.72	3.64	-9.52	-9.52	0.33 QAR	0.47	14.93
NAT BANK OF OMAN	0.190	2.70	3.83	0.00	-3.55	-3.55	0.30 QAR	0.54	12.71
OMINVEST	0.316	-1.25	8.90	0.00	3.92	3.92	0.21 QAR	0.94	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 up today by + 0.66 % The leading sector best performance indices today are Consumer services 1.28 % Technology 1.02 % Basic material 1.01 % respectively

Telecommunication sector are up today by + 1.0 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 2.99 %

KSA

Saudi Armco has a positive performance today by +2.90%, SABIC have positive performance today by 0.90%

STC have negative performance today by -1.40%, Al Rajhi Bank has a negative performance today by -0.13%

UAE

ETISALAT AD closed up today by +0.84%, and act defensively with COVID19



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