

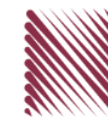


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, March 9, 2022



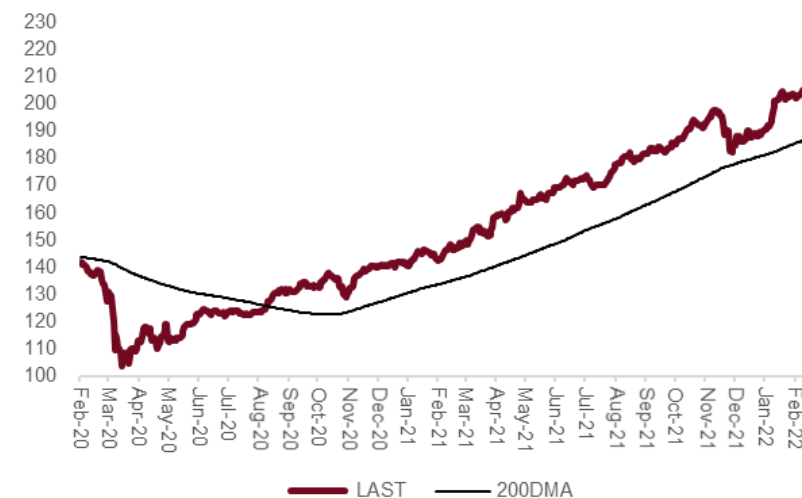


Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,738.59	-0.88	-0.14	1.18	12.91	12.91	11,896 SAR	2.45	18.56
Qatar (QE Index)	13,628.87	-0.39	1.23	5.25	17.23	17.23	694 QAR	1.82	17.60
Dubai (DFMGI)	3,385.34	-0.78	-1.86	0.92	5.93	5.93	332 AED	1.44	20.31
Abu Dhabi (ADI)	9,522.74	-2.15	-1.65	2.18	12.19	12.19	1,435 AED	1.81	36.06
Bahrain (BAX)	2,068.49	-0.07	4.68	5.34	15.09	15.09	21 BHD	1.18	17.31
MUSCAT SE INDEX	4,258.16	0.83	3.00	5.00	3.11	3.11	5 OMR	0.90	13.25
SP GCC Comp LMC	216.63	-0.98	-0.23	2.38	14.16	14.18			
Developed Markets									
MSCI World Index	2,881.78	3.01	-0.51	-3.23	-10.83	-10.83			
U.S. (S&P 500)	4,277.88	2.57	-1.18	-2.20	-10.25	-10.25			
U.K. (FTSE 100)	7,190.72	3.25	2.91	-3.59	-2.62	-2.62			
Japan (Topix)	1,758.89	-0.06	-4.66	-6.79	-11.72	-11.72			
Emerging Markets									
MSCI EM Index	1,090.67	-0.49	-4.74	-6.88	-11.47	-11.47			
China (SSE Composite)	3,256.39	-1.13	-5.55	-5.95	-10.53	-10.53			
India (Sensex)	54,647.33	2.29	0.58	-2.84	-6.19	-6.19			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,974.57	0.51	1.58	4.41	13.22	13.22	47.29 KWD	2.39	30.27
Kuwait Premier Index	8,760.62	0.61	1.87	5.29	14.68	14.68	35.93 KWD	2.60	30.29
Kuwait Main Index	6,389.88	0.16	0.60	1.57	8.56	8.56	11.37 KWD	1.71	30.23
NIC 50	9,647.11	0.48	1.86	5.28	14.67	13.20	28.60 KWD	2.58	29.29
Kuwait Sector									
Banking	1,867.47	0.74	2.52	6.31	15.08	15.08	27.78 KWD	1.37	31.29
Telecom	1,258.04	-0.22	0.91	3.35	15.48	15.48	3.86 KWD	0.87	15.81
Industrials	1,269.64	-0.03	-0.83	0.22	11.23	11.23	4.50 KWD	1.01	11.71
Financial services	1,625.06	0.61	1.06	3.07	14.17	14.17	4.09 KWD	0.93	26.83
Real estate	1,376.48	0.19	0.18	2.16	3.77	3.77	2.97 KWD	0.73	49.53
Basic materials	1,187.14	1.01	3.52	4.91	15.84	15.84	1.06 KWD	1.94	30.40
Health care	786.83	0.09	-3.19	-3.19	-1.28	-1.28	0.39 KWD	5.96	12.75
Consumer services	722.00	0.05	-1.27	-0.01	-1.25	-1.25	0.75 KWD	0.94	14.85
Insurance	1,641.36	0.70	2.70	1.70	7.04	7.04	0.69 KWD	0.80	8.73
Consumer Disc	1,467.63	-0.44	-4.74	-4.95	9.80	9.80	0.22 KWD	1.30	8.93
Energy	1,370.34	-0.15	0.03	-0.10	-4.05	-4.05	0.29 KWD	1.01	15.02
Technology	726.77	0.00	0.91	5.16	6.28	6.28	0.01 KWD	0.86	0.00
Utilities	589.47	-0.45	-0.45	1.36	-1.76	-1.76	0.25 KWD	3.97	19.03

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices firmed on Wednesday over fears of a potential supply shock as the United States banned Russian oil imports, and amid signs that some buyers are already shunning them, Brent crude futures were up \$2.91, or 2.27%, at \$130.89 a barrel.

Kuwait Market

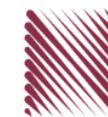
The market closed today up by + 0.51%, closed at 7,974.57 value traded 78.2 million KD, Premier market value traded reached 57.5 million KD and closed at 8,760.62 up by + 0.61%.

Saudi Market

The Market closed down today by - 0.88%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



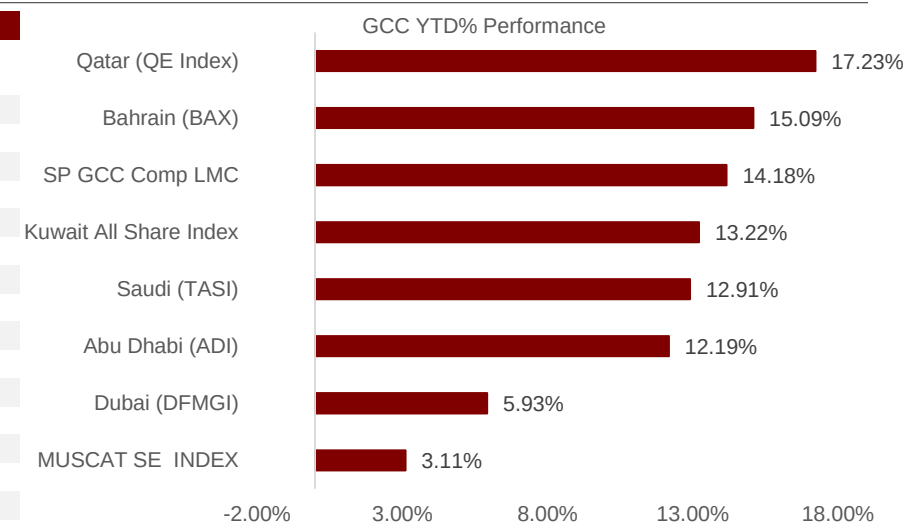
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.141	0.44	3.45	8.15	14.44	14.44	8.20 KWD	2.06	27.00
KFH	1.000	0.00	0.60	5.93	20.19	20.19	8.44 KWD	3.88	32.00
Zain	0.626	-0.63	-1.88	0.97	5.21	5.21	2.71 KWD	2.28	14.59
BOUBAYAN BANK	0.950	6.50	14.18	15.43	20.25	20.25	3.02 KWD	4.23	34.00
Agility	1.027	0.00	-0.39	1.08	8.68	8.68	2.29 KWD	1.05	2.19
Saudi Arabia									
ARAMCO	43.30	-2.91	-2.26	4.21	20.95	20.95	8,659.54 SAR	8.10	26.98
SABIC	134.20	-2.75	-0.59	7.70	15.69	15.69	402.58 SAR	2.31	35.00
STC	111.40	-0.18	-1.07	-2.28	-0.89	-0.89	222.79 SAR	3.21	19.71
AL-RAJHI BANK	153.60	-1.03	-1.92	-4.24	8.32	8.32	383.98 SAR	5.71	26.31
NCB	69.30	1.46	2.21	1.61	7.61	7.61	310.31 SAR	1.90	19.74
United Arab Emirates									
ETISALAT.AD	34.88	-2.11	-1.84	0.74	11.17	11.17	306.47 AED	6.44	32.89
FAB.AD	21.84	-4.41	-3.31	5.57	15.88	15.88	238.41 AED	2.09	19.57
EMIRATES NBD	14.65	-2.68	-3.32	1.75	7.38	7.38	91.91 AED	1.10	10.55
DB ISLAMIC BK	5.98	-0.80	-2.05	1.81	15.24	15.24	44.89 AED	1.15	11.75
EMAAR PROPERT	5.18	-0.77	-1.71	1.97	5.93	5.93	42.37 AED	0.65	9.96
Qatar									
QNB	22.95	-0.22	-2.34	5.28	13.67	13.67	212.40 QAR	2.14	17.36
INDUSTRIES QAT	19.33	-1.99	1.44	7.65	27.18	27.18	119.42 QAR	3.02	14.73
QA ISLAMIC BK	22.70	-2.12	2.73	7.16	23.30	23.30	53.51 QAR	2.16	15.90
MASRAF AL RAYA	5.10	-0.53	-0.78	1.60	9.48	9.48	47.34 QAR	1.93	22.18
MESAIEED PETRO	3.07	2.84	5.88	15.36	47.37	47.37	38.77 QAR	2.27	20.78
OMAN									
BANK MUSCAT	0.556	0.00	2.61	5.77	13.64	13.64	1.97 OMR	0.91	8.33
OMANTEL	0.852	0.95	2.42	4.95	12.77	12.77	0.64 OMR	1.13	7.69
BANK DHOFAR	0.117	0.86	2.63	6.36	-7.14	-7.14	0.35 QAR	0.50	14.93
NAT BANK OF OMAN	0.207	3.09	5.26	5.26	1.52	1.52	0.32 QAR	0.59	12.71
OMINVEST	0.326	-1.21	3.16	2.52	6.54	6.54	0.22 QAR	0.95	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
23-Feb-22	21.08%	12.35%	0.06%	0.48%	0.40%	5.99%	2.48%	10.45%	5.25%	4.29%
2-Mar-22	21.12%	12.37%	0.06%	0.48%	0.40%	5.88%	2.48%	10.46%	5.27%	4.31%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.51 % The leading sector best performance indices today are Basic materials 1.01 % Banking 0.74 % Insurance 0.7 % respectively

Telecommunication sector is down today by -0.22 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 2.26 %

KSA

Saudi Armco has a negative performance today by -2.91 %, SABIC has a negative performance today by -2.75 %

STC has a negative performance today by -0.18 %, Al Rajhi Bank has a negative performance today by -1.03 %

UAE

ETISALAT .AD has a negative performance today by -2.11 %, FAB.AD has a negative performance today by -4.41 %



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