



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

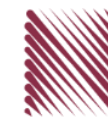
GCC DAILY MORNING BRIEF

Thursday, March 10, 2022



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
GCC Markets									
Saudi (TASI)	12,684.16	-0.43	-0.57	0.75	12.43	12.43	11,453 SAR	2.45	18.67
Qatar (QE Index)	13,633.00	0.03	1.26	5.28	17.26	17.26	687 QAR	1.81	17.26
Dubai (DFMGI)	3,402.40	-0.09	-1.94	0.83	5.84	5.84	335 AED	1.43	20.13
Abu Dhabi (ADI)	9,635.66	0.87	-0.79	3.07	13.17	13.17	1,435 AED	1.82	36.90
Bahrain (BAX)	2,053.46	-0.73	3.92	4.58	14.26	14.26	20 BHD	1.20	17.31
MUSCAT SE INDEX	4,328.46	1.65	4.70	6.73	4.82	4.82	5 OMR	0.91	13.25
SP GCC Comp LMC	216.43	-0.11	-0.34	2.26	14.03	14.04			

Developed Markets

MSCI World Index	2,840.04	-0.36	-0.86	-3.57	-11.15	-11.15			
U.S. (S&P 500)	4,204.31	-0.43	-1.60	-2.62	-10.63	-10.63			
U.K. (FTSE 100)	7,155.64	-1.27	1.60	-4.82	-3.87	-3.87			
Japan (Topix)	1,799.54	4.04	-0.81	-3.02	-8.15	-8.15			

Emerging Markets

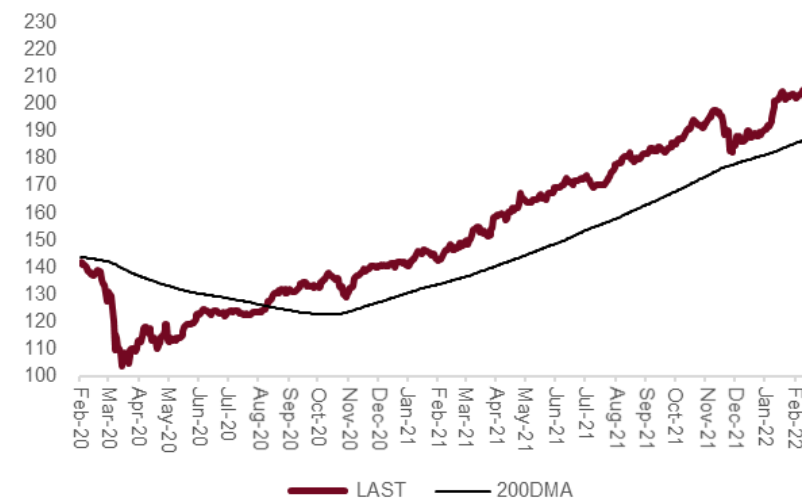
MSCI EM Index	1,085.66	1.11	-3.68	-5.85	-10.49	-10.49			
China (SSE Composite)	3,309.75	1.22	-4.40	-4.80	-9.44	-9.44			
India (Sensex)	55,550.30	1.50	2.08	-1.39	-4.79	-4.79			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Kuwait									
Kuwait All Share Index	7,957.59	-0.21	1.36	4.19	12.98	12.98	47.24 KWD	2.40	30.29
Kuwait Premier Index	8,756.23	-0.05	1.82	5.24	14.62	14.62	35.94 KWD	2.60	30.30
Kuwait Main Index	6,341.45	-0.76	-0.16	0.80	7.73	7.73	11.30 KWD	1.74	30.29
NIC 50	9,644.27	0.45	1.81	5.23	14.61	13.16	28.60 KWD	2.58	29.30

Kuwait Sector

Banking	1,856.28	-0.60	1.91	5.68	14.39	14.39	27.66 KWD	1.38	31.30
Telecom	1,264.98	0.55	1.46	3.92	16.12	16.12	3.88 KWD	0.87	15.80
Industrials	1,263.94	-0.45	-1.28	-0.23	10.73	10.73	4.48 KWD	1.00	11.87
Financial services	1,632.85	0.48	1.54	3.57	14.72	14.72	4.10 KWD	0.92	27.17
Real estate	1,390.21	1.00	1.18	3.18	4.81	4.81	3.00 KWD	0.72	49.35
Basic materials	1,171.06	-1.35	2.12	3.49	14.27	14.27	1.04 KWD	1.93	30.09
Health care	792.88	0.77	-2.44	-2.44	-0.52	-0.52	0.39 KWD	5.96	13.19
Consumer services	724.79	0.39	-0.89	0.38	-0.86	-0.86	0.77 KWD	0.95	14.96
Insurance	1,643.15	0.11	2.81	1.81	7.16	7.16	0.69 KWD	0.82	8.73
Consumer Disc	1,504.79	2.53	-2.32	-2.54	12.58	12.58	0.22 KWD	1.31	8.93
Energy	1,380.28	0.73	0.75	0.62	-3.35	-3.35	0.29 KWD	1.01	15.07
Technology	726.77	0.00	0.91	5.16	6.28	6.28	0.01 KWD	0.86	0.00
Utilities	592.11	0.45	0.00	1.81	-1.32	-1.32	0.25 KWD	3.99	19.12

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices rose on Thursday following a sharp drop in the previous session as the market contemplated whether major producers would boost supply to help plug the gap in output from Russia due to sanctions for its invasion of Ukraine, Brent crude futures were up \$3.10, or 2.8%, at \$114.24 a barrel.

Kuwait Market

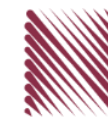
The market closed today down by - 0.21%, closed at 7,957.59 value traded 57.3 million KD, Premier market value traded reached 45.9 million KD and closed at 8,756.23 down by - 0.05%.

Saudi Market

The Market closed down today by - 0.43%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

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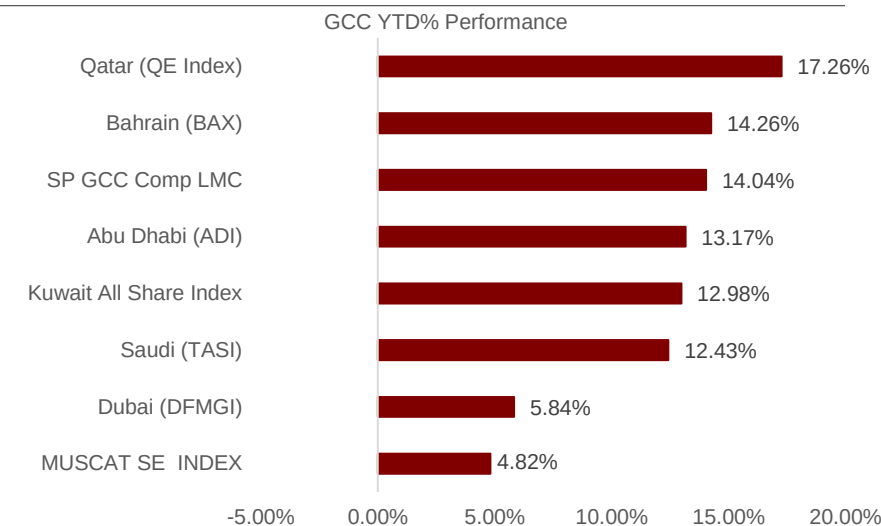
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.134	-0.61	2.81	7.49	13.74	13.74	8.16 KWD	2.05	27.00
KFH	1.000	0.00	0.60	5.93	20.19	20.19	8.44 KWD	3.88	32.00
Zain	0.633	1.12	-0.78	2.10	6.39	6.39	2.74 KWD	2.30	14.75
BOUBYAN BANK	0.934	-1.68	12.26	13.49	18.23	18.23	2.97 KWD	4.16	34.00
Agility	1.026	-0.10	-0.48	0.98	8.57	8.57	2.29 KWD	1.05	2.19
Saudi Arabia									
ARAMCO	41.10	-5.08	-7.22	-1.08	14.80	14.80	8,219.56 SAR	7.69	26.19
SABIC	132.00	-1.64	-2.22	5.94	13.79	13.79	395.98 SAR	2.28	35.00
STC	111.20	-0.18	-1.24	-2.46	-1.07	-1.07	222.39 SAR	3.21	19.68
AL-RAJHI BANK	154.20	0.39	-1.53	-3.87	8.74	8.74	385.48 SAR	5.73	26.04
NCB	69.30	0.00	2.21	1.61	7.61	7.61	310.31 SAR	1.90	20.03
United Arab Emirates									
ETISALAT.AD	34.84	-1.14	-2.95	-0.40	9.91	9.91	304.39 AED	6.40	32.52
FAB.AD	22.10	2.41	-0.98	8.12	18.67	18.67	245.26 AED	2.15	20.04
EMIRATES NBD	14.75	1.37	-1.99	3.15	8.86	8.86	93.49 AED	1.12	10.69
DB ISLAMIC BK	6.07	-2.10	-4.11	-0.33	12.83	12.83	43.44 AED	1.12	11.51
EMAAR PROPERT	5.22	0.77	-0.95	2.76	6.75	6.75	43.35 AED	0.66	10.04
Qatar									
QNB	22.70	-1.09	-3.40	4.13	12.43	12.43	209.25 QAR	2.12	17.17
INDUSTRIES QAT	19.70	0.00	1.44	7.65	27.18	27.18	118.95 QAR	3.02	14.73
QA ISLAMIC BK	22.82	0.97	3.73	8.20	24.50	24.50	53.81 QAR	2.18	16.05
MASRAF AL RAYA	5.09	0.18	-0.61	1.78	9.68	9.68	47.23 QAR	1.93	22.22
MESAEED PETRO	3.01	-2.21	3.54	12.81	44.11	44.11	37.76 QAR	2.22	20.32
OMAN									
BANK MUSCAT	0.564	2.55	5.22	8.46	16.53	16.53	2.02 OMR	0.94	8.33
OMANTEL	0.856	0.94	3.38	5.94	13.83	13.83	0.64 OMR	1.13	7.69
BANK DHOFAR	0.117	0.00	2.63	6.36	-7.14	-7.14	0.35 QAR	0.50	14.93
NAT BANK OF OMAN	0.214	7.00	12.63	12.63	8.63	8.63	0.34 QAR	0.62	12.71
OMINVEST	0.340	4.29	7.59	6.92	11.11	11.11	0.22 QAR	0.97	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
2-Mar-22	21.12%	12.37%	0.06%	0.48%	0.40%	5.88%	2.48%	10.46%	5.27%	4.31%
9-Mar-22	21.54%	12.62%	0.06%	0.47%	0.37%	6.19%	2.46%	10.60%	5.30%	4.25%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.21 % The leading sector bottom performance indices today are Basic materials -1.35 % Banking -0.6 % Industrials -0.45 % respectively

Telecommunication sector is up today by + 0.55 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 3.14 %

KSA

Saudi Armco has a negative performance today by -5.08 %, SABIC has a negative performance today by -1.64 %

STC has a negative performance today by -0.18 %, Al Rajhi Bank has a positive performance today by + 0.39 %

UAE

ETISALAT AD has a negative performance today by -1.14 %, FAB.AD has a positive performance today by + 2.41 %



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