

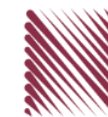


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, March 13, 2022





Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,605.40	-0.62	-0.62	0.12	11.73	11.73	11,210 SAR	2.43	18.72
Qatar (QE Index)	13,489.03	-1.06	-1.06	4.17	16.03	16.03	684 QAR	1.78	16.87
Dubai (DFMGI)	3,402.40	0.59	-1.36	1.42	6.46	6.46	335 AED	1.43	20.16
Abu Dhabi (ADI)	9,635.66	0.31	-0.48	3.39	13.52	13.52	1,435 AED	1.82	37.08
Bahrain (BAX)	2,032.95	-1.00	-1.00	3.53	13.11	13.11	20 BHD	1.20	17.27
MUSCAT SE INDEX	4,349.97	0.50	0.50	7.26	5.34	5.34	5 OMR	0.91	13.25
SP GCC Comp LMC	215.39	-0.46	-0.48	1.79	13.51	13.52			

Developed Markets

MSCI World Index	2,840.04	-1.10	-1.95	-4.63	-12.12	-12.12			
U.S. (S&P 500)	4,204.31	-1.30	-2.88	-3.88	-11.79	-11.79			
U.K. (FTSE 100)	7,155.64	0.80	2.41	-4.06	-3.10	-3.10			
Japan (Topix)	1,799.54	-1.67	-2.46	-4.63	-9.68	-9.68			

Emerging Markets

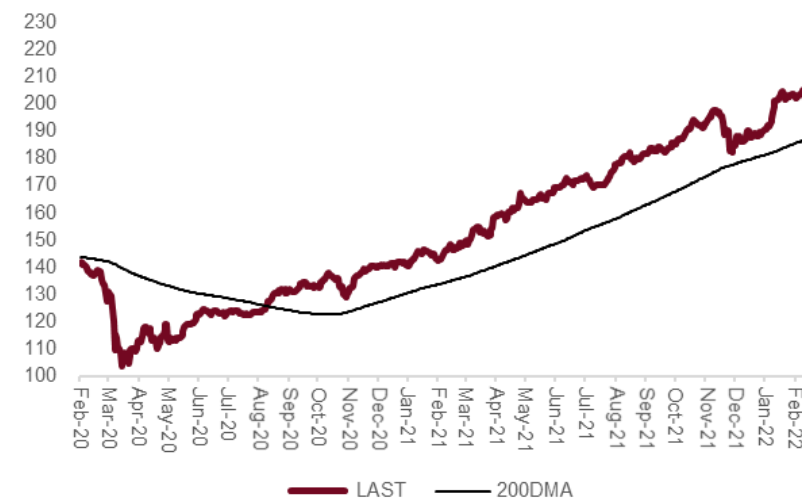
MSCI EM Index	1,085.66	-1.55	-5.17	-7.31	-11.88	-11.88			
China (SSE Composite)	3,309.75	0.41	-4.00	-4.41	-9.07	-9.07			
India (Sensex)	55,550.30	0.15	2.24	-1.24	-4.64	-4.64			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,948.90	-0.11	-0.11	4.08	12.86	12.86	47.13 KWD	2.40	30.24
Kuwait Premier Index	8,735.87	-0.23	-0.23	5.00	14.36	14.36	35.80 KWD	2.60	30.15
Kuwait Main Index	6,360.91	0.31	0.31	1.11	8.06	8.06	11.33 KWD	1.74	30.57
NIC 50	9,624.07	0.24	-0.24	4.99	12.93	12.93	28.60 KWD	2.58	29.15

Kuwait Sector

Banking	1,856.73	0.02	0.02	5.70	14.42	14.42	27.61 KWD	1.37	31.15
Telecom	1,254.84	-0.80	-0.80	3.08	15.19	15.19	3.85 KWD	0.89	15.71
Industrials	1,260.84	-0.25	-0.25	-0.48	10.46	10.46	4.47 KWD	1.00	11.79
Financial services	1,625.14	-0.47	-0.47	3.08	14.18	14.18	4.08 KWD	0.92	27.28
Real estate	1,394.68	0.32	0.32	3.51	5.15	5.15	3.01 KWD	0.73	51.84
Basic materials	1,166.02	-0.43	-0.43	3.05	13.78	13.78	1.04 KWD	1.92	29.99
Health care	792.88	0.00	0.00	-2.44	-0.52	-0.52	0.39 KWD	5.96	13.19
Consumer services	722.37	-0.33	-0.33	0.05	-1.20	-1.20	0.78 KWD	0.94	14.75
Insurance	1,642.60	-0.03	-0.03	1.78	7.12	7.12	0.69 KWD	0.82	8.73
Consumer Disc	1,509.72	0.33	0.33	-2.22	12.95	12.95	0.22 KWD	1.33	8.91
Energy	1,376.85	-0.25	-0.25	0.37	-3.59	-3.59	0.29 KWD	1.01	15.07
Technology	726.77	0.00	0.00	5.16	6.28	6.28	0.01 KWD	0.86	0.00
Utilities	592.11	0.00	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 settled higher on Friday but posted their steepest weekly decline since November, as traders assessed potential improvements to the supply outlook that has been disrupted by Russia's invasion of Ukraine, Brent crude futures rose \$3.34, or 3.1%, on Friday, settling at \$112.67 a barrel.

Kuwait Market

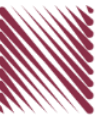
The market closed today down by - 0.11%, closed at 7,948.90 value traded 42.7 million KD, Premier market value traded reached 30.2 million KD and closed at 8,735.87 down by - 0.23%.

Saudi Market

The Market closed down today by - 0.62%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



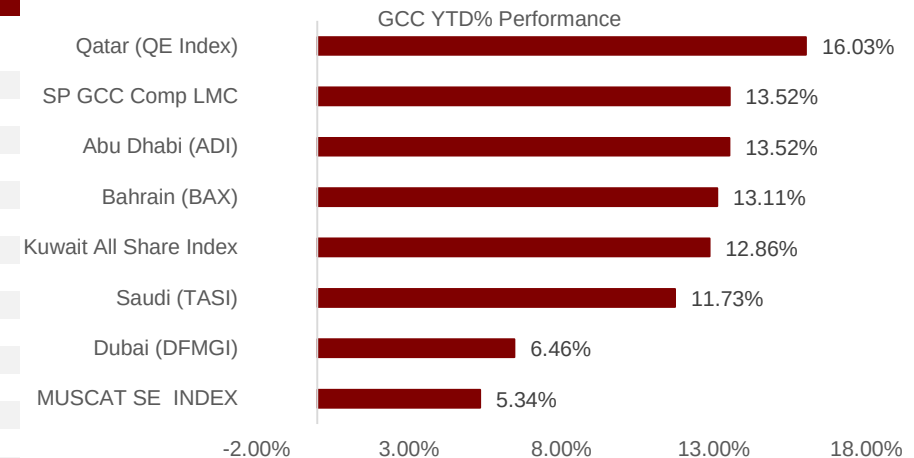
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.131	-0.26	-0.26	7.20	13.44	13.44	8.13 KWD	2.04	27.00
KFH	1.001	0.10	0.10	6.04	20.31	20.31	8.45 KWD	3.88	32.00
Zain	0.629	-0.63	-0.63	1.45	5.71	5.71	2.72 KWD	2.29	14.66
BOUBYAN BANK	0.929	-0.54	-0.54	12.88	17.59	17.59	2.95 KWD	4.14	34.00
Agility	1.024	-0.19	-0.19	0.79	8.36	8.36	2.28 KWD	1.05	2.18
Saudi Arabia									
ARAMCO	39.95	-2.80	-2.80	-3.85	11.59	11.59	7,990.00 SAR	7.47	24.86
SABIC	131.20	-0.61	-0.61	5.30	13.10	13.10	393.60 SAR	2.26	35.00
STC	111.20	0.00	0.00	-2.46	-1.07	-1.07	222.40 SAR	3.21	19.64
AL-RAJHI BANK	154.00	-0.13	-0.13	-3.99	8.60	8.60	385.00 SAR	5.72	26.14
NCB	68.60	-1.01	-1.01	0.59	6.52	6.52	307.19 SAR	1.88	20.03
United Arab Emirates									
ETISALAT.AD	35.00	0.46	-2.51	0.06	10.41	10.41	304.39 AED	6.40	32.67
FAB.AD	22.20	0.45	-0.53	8.60	19.21	19.21	245.26 AED	2.15	20.13
EMIRATES NBD	14.80	0.34	-1.66	3.50	9.23	9.23	93.49 AED	1.12	10.73
DB ISLAMIC BK	6.00	-1.15	-5.21	-1.48	11.52	11.52	43.44 AED	1.12	11.37
EMAAR PROPERT	5.30	1.53	0.57	4.33	8.38	8.38	43.35 AED	0.66	10.19
Qatar									
QNB	22.25	-1.98	-1.98	2.06	10.20	10.20	206.53 QAR	2.08	16.83
INDUSTRIES QAT	19.35	-1.78	-1.78	5.74	24.92	24.92	117.65 QAR	2.96	14.47
QA ISLAMIC BK	22.80	-0.09	-0.09	8.11	24.39	24.39	54.14 QAR	2.18	16.04
MASRAF AL RAYA	5.09	-0.04	-0.04	1.74	9.63	9.63	47.54 QAR	1.93	22.21
MESAIEED PETRO	2.99	-0.70	-0.70	12.02	43.11	43.11	37.76 QAR	2.20	20.18
OMAN									
BANK MUSCAT	0.560	-0.71	-0.71	7.69	15.70	15.70	1.99 OMR	0.93	8.33
OMANTEL	0.856	0.00	0.00	5.94	13.83	13.83	0.64 OMR	1.13	7.69
BANK DHOFAR	0.120	2.56	2.56	9.09	-4.76	-4.76	0.36 QAR	0.51	14.93
NAT BANK OF OMAN	0.202	-5.61	-5.61	6.32	2.54	2.54	0.35 QAR	0.63	12.71
OMINVEST	0.344	1.18	1.18	8.18	12.42	12.42	0.23 QAR	0.99	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 -0.11 % The leading sector bottom performance indices today are Telecom -0.8 % Financial services -0.47 % Basic materials -0.43 % respectively

Telecommunication sector are down today by -0.8 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 2.33 %

KSA

Saudi Armco has a negative performance today by -2.80 %, SABIC has a negative performance today by -0.61 %

STC has flat performance today, Al Rajhi Bank has negative performance today by -0.13 %

UAE

ETISALAT .AD has a positive performance today by + 0.46 %, FAB.AD has a positive performance today by + 0.45 %



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