



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, March 14, 2022





Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
GCC Markets									
Saudi (TASI)	12,492.14	-0.90	-1.51	-0.78	10.73	10.73	11,059 SAR	2.39	18.48
Qatar (QE Index)	13,470.86	-0.13	-1.19	4.03	15.87	15.87	681 QAR	1.79	16.81
Dubai (DFMGI)	3,353.51	-1.44	-1.44	-0.03	4.93	4.93	331 AED	1.43	20.17
Abu Dhabi (ADI)	9,542.65	-0.97	-0.97	2.40	12.42	12.42	1,435 AED	1.81	21.52
Bahrain (BAX)	2,005.30	-1.36	-2.35	2.12	11.58	11.58	20 BHD	1.20	17.25
MUSCAT SE INDEX	4,324.70	-0.58	-0.09	6.64	4.73	4.73	5 OMR	0.91	13.25
SP GCC Comp LMC	213.42	-0.92	-1.39	0.86	12.47	12.48			

Developed Markets

MSCI World Index	2,826.49	-0.48	-0.48	-5.09	-12.54	-12.54			
U.S. (S&P 500)	4,173.11	-0.74	-0.74	-4.59	-12.44	-12.44			
U.K. (FTSE 100)	7,193.47	0.53	0.53	-3.55	-2.59	-2.59			
Japan (Topix)	1,812.28	0.71	0.71	-3.96	-9.04	-9.04			

Emerging Markets

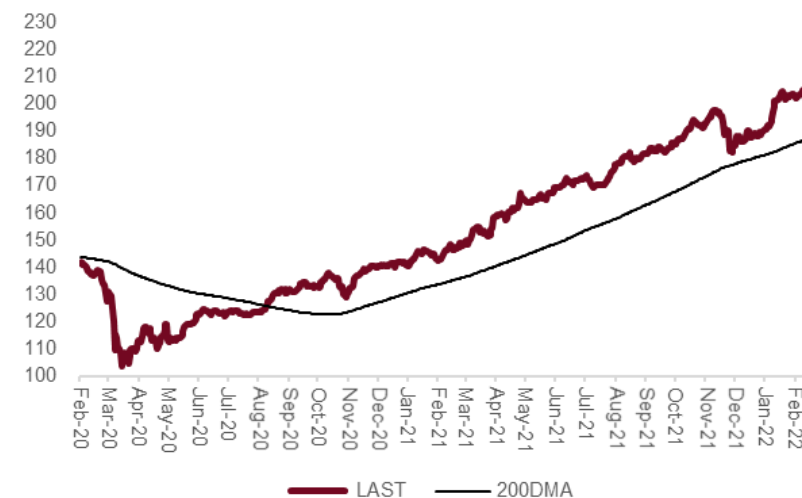
MSCI EM Index	1,055.01	-2.82	-2.82	-9.93	-14.37	-14.37			
China (SSE Composite)	3,223.53	-2.60	-2.60	-6.90	-11.44	-11.44			
India (Sensex)	56,486.02	1.68	1.68	0.42	-3.03	-3.03			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Kuwait									
Kuwait All Share Index	7,860.56	-1.11	-1.22	2.92	11.61	11.61	46.70 KWD	2.35	29.87
Kuwait Premier Index	8,653.85	-0.94	-1.17	4.01	13.28	13.28	35.53 KWD	2.57	29.78
Kuwait Main Index	6,253.41	-1.69	-1.39	-0.60	6.24	6.24	11.17 KWD	1.65	30.21
NIC 50	9,536.36	-0.68	-1.18	4.00	13.27	11.90	28.60 KWD	2.55	28.78

Kuwait Sector

Banking	1,841.81	-0.80	-0.78	4.85	13.50	13.50	27.44 KWD	1.36	30.78
Telecom	1,242.05	-1.02	-1.81	2.03	14.02	14.02	3.82 KWD	0.87	15.68
Industrials	1,246.89	-1.11	-1.35	-1.58	9.23	9.23	4.43 KWD	0.99	11.73
Financial services	1,608.94	-1.00	-1.46	2.05	13.04	13.04	4.06 KWD	0.93	26.72
Real estate	1,392.72	-0.14	0.18	3.37	5.00	5.00	3.01 KWD	0.72	53.50
Basic materials	1,150.68	-1.32	-1.74	1.69	12.29	12.29	1.03 KWD	1.92	29.51
Health care	515.58	-34.97	-34.97	-36.56	-35.31	-35.31	0.26 KWD	3.23	13.19
Consumer services	716.78	-0.77	-1.11	-0.73	-1.96	-1.96	0.77 KWD	0.92	14.85
Insurance	1,644.99	0.15	0.11	1.93	7.28	7.28	0.69 KWD	0.82	8.73
Consumer Disc	1,499.43	-0.68	-0.36	-2.89	12.18	12.18	0.22 KWD	1.30	8.91
Energy	1,360.26	-1.20	-1.45	-0.83	-4.75	-4.75	0.28 KWD	0.99	14.74
Technology	683.85	-5.91	-5.91	-1.05	0.00	0.00	0.01 KWD	0.81	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 fell by around \$5 a barrel on Monday as investors pinned hopes on diplomatic efforts by Ukraine and Russia to end their conflict, while a surge in COVID-19 cases in China spooked the markets, Brent was down by \$4.94, or 4.4%, at \$107.72 per barrel.

Kuwait Market

The market closed today down by - 1.11%, closed at 7,860.56 value traded 58.4 million KD, Premier market value traded reached 41.7 million KD and closed at 8,653.85 down by - 0.94%.

Saudi Market

The Market closed down today by - 0.90%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



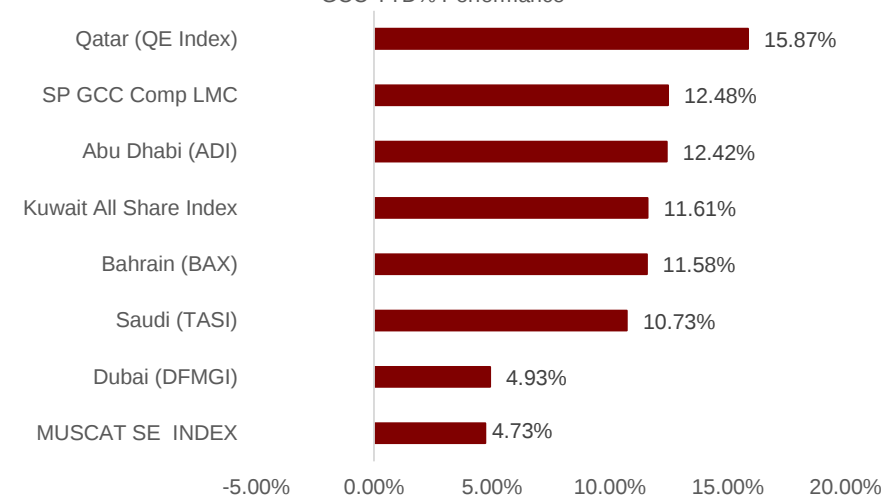
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE	
Blue Chip Watch		%	%	%	%	%				
Kuwait										
NBK	1.119	-1.06	-1.32	6.07	12.24	12.24	8.06 KWD	2.02	27.00	
KFH	0.999	-0.20	-0.10	5.83	20.07	20.07	8.45 KWD	3.87	32.00	
Zain	0.620	-1.43	-2.05	0.00	4.20	4.20	2.69 KWD	2.26	14.45	
BOUBYAN BANK	0.913	-1.72	-2.25	10.94	15.57	15.57	2.91 KWD	4.07	34.00	
Agility	1.009	-1.46	-1.66	-0.69	6.77	6.77	2.25 KWD	1.03	2.15	
Saudi Arabia										
ARAMCO	39.30	-1.63	-4.38	-5.42	9.78	9.78	7,860.21 SAR	7.35	24.17	
SABIC	129.20	-1.52	-2.12	3.69	11.38	11.38	387.61 SAR	2.15	35.00	
STC	110.00	-1.08	-1.08	-3.51	-2.14	-2.14	220.01 SAR	3.17	19.64	
AL-RAJHI BANK	151.00	-1.95	-2.08	-5.86	6.49	6.49	377.51 SAR	5.61	26.11	
NCB	67.80	-1.17	-2.16	-0.59	5.28	5.28	303.62 SAR	1.85	19.83	
United Arab Emirates										
ETISALAT.AD	34.64	-1.03	-1.03	-0.97	9.27	9.27	301.26 AED	6.33	32.33	
FAB.AD	21.78	-1.89	-1.89	6.55	16.96	16.96	240.62 AED	2.11	19.75	
EMIRATES NBD	14.25	-3.72	-3.72	-0.35	5.17	5.17	90.01 AED	1.08	10.33	
DB ISLAMIC BK	5.90	-1.67	-1.67	-3.12	9.67	9.67	42.72 AED	1.10	11.18	
EMAAR PROPERT	5.28	-0.38	-0.38	3.94	7.98	7.98	43.19 AED	0.66	10.15	
Qatar										
QNB	22.70	2.02	0.00	4.13	12.43	12.43	209.45 QAR	2.12	17.17	
INDUSTRIES QAT	19.02	-1.71	-3.45	3.93	22.79	22.79	114.95 QAR	2.91	14.23	
QA ISLAMIC BK	22.75	-0.22	-0.31	7.87	24.11	24.11	53.70 QAR	2.17	16.00	
MASRAF AL RAYA	5.10	0.26	0.22	2.00	9.91	9.91	47.38 QAR	1.94	22.27	
MESAIEED PETRO	2.95	-1.37	-2.06	10.49	41.15	41.15	37.02 QAR	2.17	19.91	
OMAN										
BANK MUSCAT	0.554	-1.07	-1.77	6.54	14.46	14.46	1.99 OMR	0.92	8.33	
OMANTEL	0.852	-0.47	-0.47	5.45	13.30	13.30	0.64 OMR	1.13	7.69	
BANK DHOFAR	0.120	0.00	2.56	9.09	-4.76	-4.76	0.36 QAR	0.51	14.93	
NAT BANK OF OMAN	0.210	3.96	-1.87	10.53	6.60	6.60	0.34 QAR	0.62	12.71	
OMINVEST	0.336	-2.33	-1.18	5.66	9.80	9.80	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, Boursa Kuwait , Refinitiv , NIC

GCC YTD% Performance



Leading Sector, Security Performance

Kuwait

The market is down today by -1.11 %The leading sector bottom performance indices today are Health care -34.97 % Technology -5.91 % Basic materials -1.32 % respectively

Telecommunication sector are down today by -1.02 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 2.41 %

KSA

Saudi Armco has a negative performance today by -1.63 %, SABIC has a negative performance today by -1.52 %

STC has a negative performance today by -1.08 %, Al Rajhi Bank has a negative performance today by -1.95 %

UAE

ETISALAT .AD has a negative performance today by -1.03 %, FAB.AD has a negative performance today by -1.89 %



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