

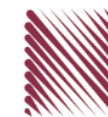


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, March 15, 2022





Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,407.60	-0.68	-2.18	-1.45	9.98	9.98	10,918 SAR	2.38	18.66
Qatar (QE Index)	13,236.76	-1.74	-2.91	2.22	13.86	13.86	667 QAR	1.71	16.20
Dubai (DFMGI)	3,305.34	-1.44	-2.85	-1.47	3.42	3.42	326 AED	1.40	19.77
Abu Dhabi (ADI)	9,480.44	-0.65	-1.61	1.73	11.69	11.69	1,435 AED	1.80	21.51
Bahrain (BAX)	1,969.37	-1.79	-4.10	0.29	9.58	9.58	20 BHD	1.19	17.23
MUSCAT SE INDEX	4,343.10	0.43	0.34	7.09	5.17	5.17	5 OMR	0.91	13.25
SP GCC Comp LMC	211.55	-0.87	-2.25	-0.02	11.49	11.49			

Developed Markets

MSCI World Index	2,865.89	1.39	0.91	-3.76	-11.32	-11.32			
U.S. (S&P 500)	4,262.45	2.14	1.38	-2.55	-10.57	-10.57			
U.K. (FTSE 100)	7,175.70	-0.25	0.28	-3.79	-2.83	-2.83			
Japan (Topix)	1,826.63	0.79	1.51	-3.20	-8.32	-8.32			

Emerging Markets

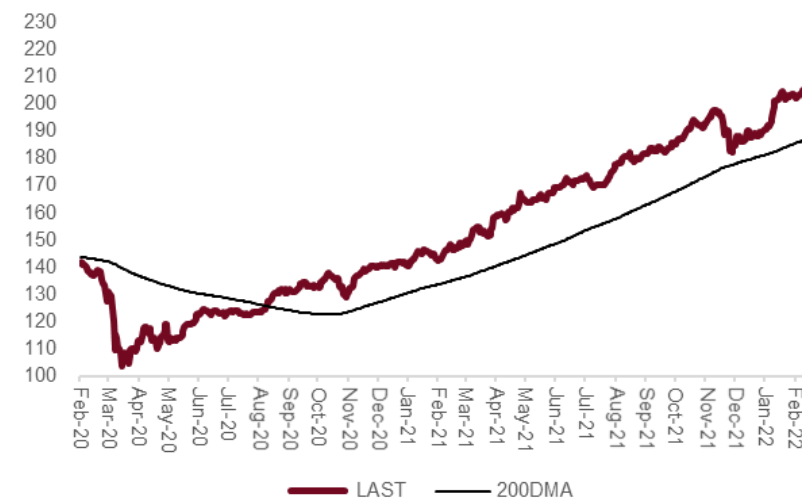
MSCI EM Index	1,026.77	-2.68	-5.42	-12.34	-16.66	-16.66			
China (SSE Composite)	3,063.97	-4.95	-7.43	-11.51	-15.82	-15.82			
India (Sensex)	55,776.85	-1.26	0.41	-0.84	-4.25	-4.25			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,824.20	-0.46	-1.68	2.44	11.09	11.09	46.43 KWD	2.34	29.66
Kuwait Premier Index	8,608.35	-0.53	-1.69	3.46	12.69	12.69	35.31 KWD	2.56	29.54
Kuwait Main Index	6,237.84	-0.25	-1.63	-0.85	5.97	5.97	11.12 KWD	1.65	30.09
NIC 50	9,487.48	-1.19	-1.70	3.45	12.68	11.32	28.60 KWD	2.54	28.54

Kuwait Sector

Banking	1,834.98	-0.37	-1.15	4.46	13.08	13.08	27.33 KWD	1.36	30.54
Telecom	1,249.80	0.62	-1.20	2.67	14.73	14.73	3.83 KWD	0.88	15.62
Industrials	1,232.40	-1.16	-2.50	-2.72	7.96	7.96	4.37 KWD	0.99	11.47
Financial services	1,589.11	-1.23	-2.68	0.79	11.65	11.65	4.01 KWD	0.92	26.61
Real estate	1,380.73	-0.86	-0.68	2.48	4.10	4.10	2.98 KWD	0.73	52.86
Basic materials	1,147.31	-0.29	-2.03	1.39	11.96	11.96	1.02 KWD	1.92	29.46
Health care	514.77	-0.16	-35.08	-36.66	-35.41	-35.41	0.26 KWD	3.22	13.17
Consumer services	713.05	-0.52	-1.62	-1.25	-2.47	-2.47	0.77 KWD	0.93	14.76
Insurance	1,647.57	0.16	0.27	2.08	7.45	7.45	0.69 KWD	0.82	8.73
Consumer Disc	1,504.80	0.36	0.00	-2.54	12.58	12.58	0.22 KWD	1.30	8.83
Energy	1,339.28	-1.54	-2.97	-2.36	-6.22	-6.22	0.28 KWD	1.00	14.74
Technology	683.85	0.00	-5.91	-1.05	0.00	0.00	0.01 KWD	0.81	0.00
Utilities	589.47	0.00	-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 slid to a two-week low on Tuesday on continued ceasefire talks between Russia and Ukraine and concerns about demand in China after a surge in Covid-19 cases, Brent futures dropped \$6.00, or 4.9%, to trade at \$100.69 per barrel, after falling 5.1% the previous day.

Kuwait Market

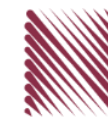
The market closed today down by - 0.46%, closed at 7,824.20 value traded 48.4 million KD, Premier market value traded reached 35.0 million KD and closed at 8,608.35 down by - 0.53%.

Saudi Market

The Market closed down today by - 0.68%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



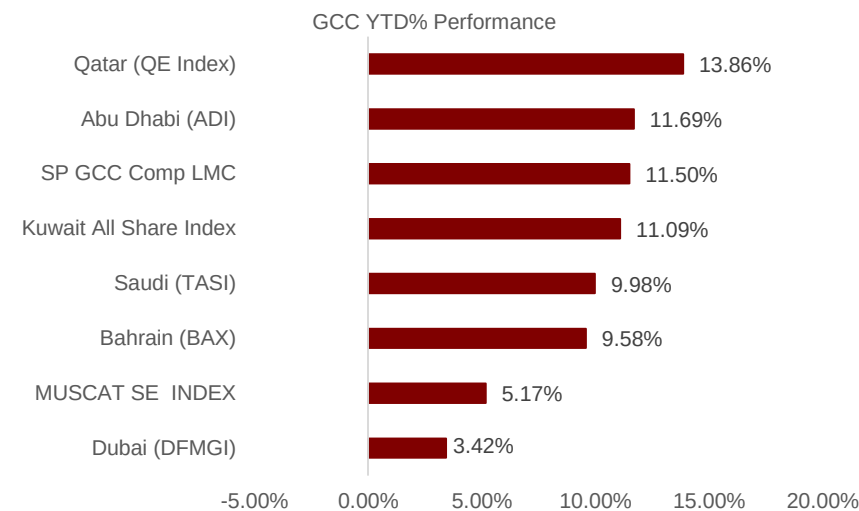
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.112	-0.63	-1.94	5.40	11.53	11.53	8.00 KWD	2.01	27.00
KFH	0.995	-0.40	-0.50	5.40	19.59	19.59	8.40 KWD	3.86	32.00
Zain	0.625	0.81	-1.26	0.81	5.04	5.04	2.71 KWD	2.27	14.56
BOUBAYAN BANK	0.916	0.33	-1.93	11.30	15.95	15.95	2.91 KWD	4.08	34.00
Agility	1.004	-0.50	-2.14	-1.18	6.24	6.24	2.24 KWD	1.03	2.14
Saudi Arabia									
ARAMCO	38.75	-1.40	-5.72	-6.74	8.24	8.24	7,750.21 SAR	7.25	23.77
SABIC	126.40	-2.17	-4.24	1.44	8.97	8.97	379.21 SAR	2.11	35.00
STC	109.60	-0.36	-1.44	-3.86	-2.49	-2.49	219.21 SAR	3.16	19.43
AL-RAJHI BANK	151.00	0.00	-2.08	-5.86	6.49	6.49	377.51 SAR	5.61	25.60
NCB	68.10	0.44	-1.73	-0.15	5.75	5.75	304.96 SAR	1.86	19.60
United Arab Emirates									
ETISALAT.AD	34.36	-0.81	-1.83	-1.77	8.39	8.39	298.82 AED	6.28	32.07
FAB.AD	21.70	-0.37	-2.25	6.16	16.53	16.53	239.73 AED	2.10	19.68
EMIRATES NBD	14.00	-1.75	-5.41	-2.10	3.32	3.32	88.43 AED	1.06	10.15
DB ISLAMIC BK	5.78	-2.03	-3.67	-5.09	7.43	7.43	41.85 AED	1.07	10.96
EMAAR PROPERT	5.21	-1.33	-1.70	2.56	6.54	6.54	42.62 AED	0.65	10.02
Qatar									
QNB	22.70	0.00	0.00	4.13	12.43	12.43	208.85 QAR	2.12	17.17
INDUSTRIES QAT	18.45	-3.00	-6.35	0.82	19.11	19.11	111.19 QAR	2.83	13.80
QA ISLAMIC BK	22.65	-0.44	-0.74	7.40	23.57	23.57	53.31 QAR	2.16	15.93
MASRAF AL RAYA	5.06	-0.78	-0.57	1.20	9.05	9.05	46.87 QAR	1.92	22.10
MESAIEED PETRO	2.78	-5.66	-7.60	4.23	33.16	33.16	34.83 QAR	2.05	18.78
OMAN									
BANK MUSCAT	0.546	-1.44	-3.19	5.00	12.81	12.81	1.97 OMR	0.91	8.33
OMANTEL	0.860	0.94	0.47	6.44	14.36	14.36	0.64 OMR	1.14	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	0.00	-1.87	10.53	6.60	6.60	0.34 QAR	0.62	12.71
OMINVEST	0.336	0.00	-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, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.46 %The leading sector bottom performance indices today are Energy -1.54 % Financial services -1.23 % Industrials -1.16 % respectively

Telecommunication sector is up today by + 0.62 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 3.64 %

KSA

Saudi Armco has a negative performance today by -1.4 %, SABIC has a negative performance today by -2.17 %

STC has a negative performance today by -0.36 %, Al Rajhi Bank has a flat performance today

UAE

ETISALAT .AD has a negative performance today by -0.81 %, FAB.AD has a negative performance today by -0.37 %



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