



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, March 17, 2022



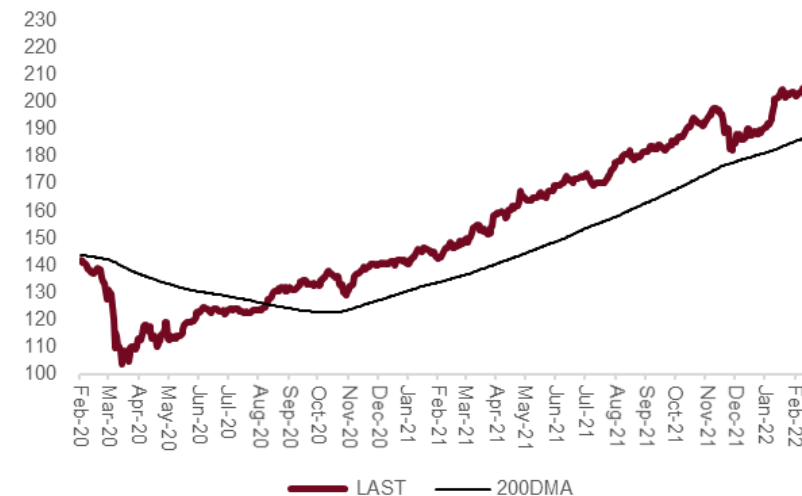


Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
GCC Markets									
Saudi (TASI)	12,769.21	0.89	0.67	1.42	13.19	13.19	11,592 SAR	2.40	19.34
Qatar (QE Index)	13,397.57	0.89	-1.73	3.47	15.24	15.24	678 QAR	1.76	16.43
Dubai (DFMGI)	3,350.09	1.11	0.22	1.65	6.69	6.69	331 AED	1.43	20.23
Abu Dhabi (ADI)	9,606.52	0.18	-0.28	3.10	13.19	13.19	1,435 AED	1.82	21.59
Bahrain (BAX)	1,965.07	0.20	-4.30	0.07	9.34	9.34	20 BHD	1.18	17.55
MUSCAT SE INDEX	4,315.79	0.09	-0.29	6.42	4.51	4.51	5 OMR	0.91	13.25
SP GCC Comp LMC	216.77	0.85	0.25	2.54	14.34	14.34			
Developed Markets									
MSCI World Index	3,010.59	1.53	4.97	0.11	-7.75	-7.75			
U.S. (S&P 500)	4,463.12	1.23	4.93	0.86	-7.44	-7.44			
U.K. (FTSE 100)	7,404.73	1.28	3.21	-0.98	0.01	0.01			
Japan (Topix)	1,909.27	2.47	5.53	0.64	-4.68	-4.68			
Emerging Markets									
MSCI EM Index	1,122.98	3.69	3.25	-4.30	-9.02	-9.02			
China (SSE Composite)	3,251.07	1.40	-2.86	-7.14	-11.67	-11.67			
India (Sensex)	57,863.93	1.84	4.16	2.87	-0.67	-0.67			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Kuwait									
Kuwait All Share Index	7,869.66	-0.13	-1.10	3.04	11.73	11.73	46.68 KWD	2.37	29.43
Kuwait Premier Index	8,694.12	0.04	-0.71	4.49	13.81	13.81	35.64 KWD	2.58	30.21
Kuwait Main Index	6,186.75	-0.68	-2.44	-1.66	5.10	5.10	11.04 KWD	1.67	26.94
NIC 50	9,572.29	-0.30	-0.72	4.48	13.80	12.32	28.60 KWD	2.56	29.21
Kuwait Sector									
Banking	1,841.75	-0.25	-0.78	4.85	13.49	13.49	27.41 KWD	1.36	31.21
Telecom	1,251.66	-0.93	-1.05	2.82	14.90	14.90	3.84 KWD	0.83	15.68
Industrials	1,253.54	0.94	-0.82	-1.05	9.82	9.82	4.45 KWD	0.97	11.22
Financial services	1,614.00	0.64	-1.15	2.37	13.40	13.40	4.04 KWD	0.93	24.54
Real estate	1,380.29	-0.71	-0.71	2.44	4.06	4.06	2.98 KWD	0.71	53.54
Basic materials	1,152.95	0.58	-1.55	1.89	12.51	12.51	1.03 KWD	1.94	29.60
Health care	497.12	-3.52	-37.30	-38.83	-37.63	-37.63	0.25 KWD	3.05	13.17
Consumer services	718.54	-0.05	-0.86	-0.48	-1.72	-1.72	0.79 KWD	0.93	16.87
Insurance	1,642.69	-0.27	-0.03	1.78	7.13	7.13	0.69 KWD	0.80	8.73
Consumer Disc	1,532.14	0.37	1.82	-0.77	14.63	14.63	0.22 KWD	1.31	8.90
Energy	1,373.89	0.07	-0.46	0.16	-3.80	-3.80	0.29 KWD	1.01	14.91
Technology	683.85	-4.08	-5.91	-1.05	0.00	0.00	0.01 KWD	0.81	0.00
Utilities	594.74	0.00	0.44	2.26	-0.88	-0.88	0.25 KWD	4.01	19.20

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices climbed 4% on Thursday after the International Energy Agency (IEA) said three million barrels a day (bpd) of Russian oil and products could be shut in from next month and despite the U.S. Federal Reserve's decision to raise interest rates, Benchmark Brent crude futures gained \$4, or 4.1%, to \$102.02 a barrel.

Kuwait Market

The market closed today down by – 0.13%, closed at 7,869.66 value traded 115.0 million KD, Premier market value traded reached 100.9 million KD and closed at 8,694.12 up by + 0.04%.

Saudi Market

The Market closed up today by + 0.89%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



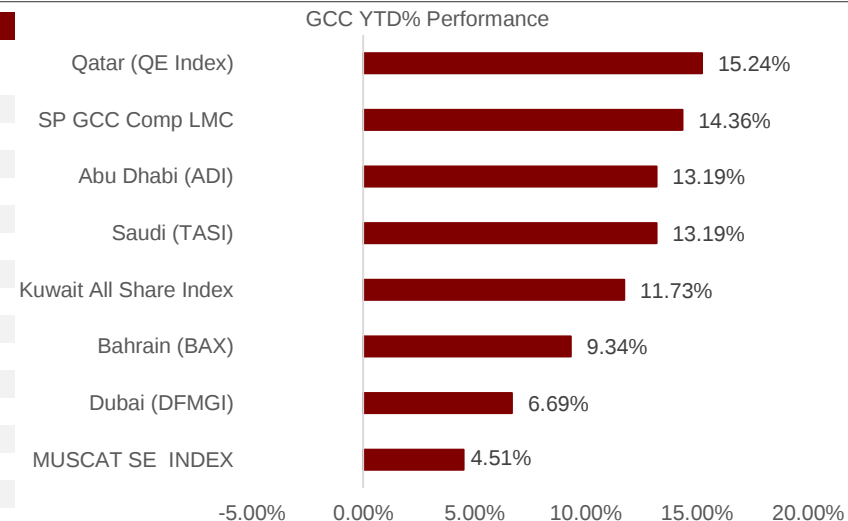
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.120	-1.32	-1.23	6.16	12.34	12.34	8.06 KWD	2.02	27.00
KFH	0.992	0.20	-0.80	5.08	19.23	19.23	8.37 KWD	3.85	32.00
Zain	0.627	-1.10	-0.95	1.13	5.38	5.38	2.71 KWD	2.28	14.61
BOUBYAN BANK	0.945	1.50	1.18	14.82	19.62	19.62	3.00 KWD	4.21	34.00
Agility	1.029	1.08	0.29	1.28	8.89	8.89	2.29 KWD	1.05	2.19
Saudi Arabia									
ARAMCO	41.85	2.07	1.82	0.72	16.90	16.90	8,370.00 SAR	7.83	24.80
SABIC	127.40	-1.09	-3.48	2.25	9.83	9.83	382.20 SAR	2.12	35.00
STC	109.40	-1.97	-1.62	-4.04	-2.67	-2.67	218.80 SAR	3.15	19.71
AL-RAJHI BANK	159.00	3.38	3.11	-0.87	12.13	12.13	397.50 SAR	5.91	26.07
NCB	68.00	-0.58	-1.88	-0.29	5.59	5.59	304.50 SAR	1.86	19.77
United Arab Emirates									
ETISALAT.AD	35.00	0.00	0.00	0.06	10.41	10.41	304.39 AED	6.40	32.67
FAB.AD	21.70	-0.73	-2.25	6.16	16.53	16.53	241.50 AED	2.11	19.82
EMIRATES NBD	14.70	0.34	-0.68	2.80	8.49	8.49	87.18 AED	1.04	10.66
DB ISLAMIC BK	6.00	2.56	0.00	-1.48	11.52	11.52	43.52 AED	1.12	11.37
EMAAR PROPERT	5.35	1.13	0.94	5.31	9.41	9.41	44.17 AED	0.68	10.29
Qatar									
QNB	22.75	0.00	0.22	4.36	12.68	12.68	210.13 QAR	2.12	17.21
INDUSTRIES QAT	19.25	3.00	-2.28	5.19	24.27	24.27	116.46 QAR	2.95	14.40
QA ISLAMIC BK	22.70	-0.39	-0.53	7.63	23.84	23.84	53.64 QAR	2.17	15.97
MASRAF AL RAYA	5.17	2.08	1.49	3.30	11.31	11.31	48.03 QAR	1.96	22.55
MESAIEED PETRO	2.74	2.89	-8.93	2.73	31.24	31.24	34.46 QAR	2.02	18.51
OMAN									
BANK MUSCAT	0.550	0.36	-2.48	5.77	13.64	13.64	1.97 OMR	0.91	8.33
OMANTEL	0.860	1.42	0.47	6.44	14.36	14.36	0.65 OMR	1.16	7.69
BANK DHOFAR	0.121	0.00	3.42	10.00	-3.97	-3.97	0.36 QAR	0.52	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	0.334	-0.60	-1.76	5.03	9.15	9.15	0.22 QAR	0.98	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
9-Mar-22	21.54%	12.62%	0.06%	0.47%	0.37%	6.19%	2.46%	10.60%	5.30%	4.25%
16-Mar-22	21.76%	12.67%	0.06%	0.47%	0.37%	6.28%	2.48%	10.62%	5.33%	4.27%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.13 %The leading sector bottom performance indices today are Technology -4.08 % Health care -3.52 % Telecom -0.93 % respectively

Telecommunication sector are down today by -0.93 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 3.17 %

KSA

Saudi Armco has a positive performance today by + 2.07 %, SABIC have negative performance today by -1.09 %

STC have negative performance today by -1.97 %, Al Rajhi Bank has a positive performance today by + 3.38 %

UAE

ETISALAT .AD flat performance today, FAB.AD has a negative performance today by -0.73 %



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