



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, March 20, 2022

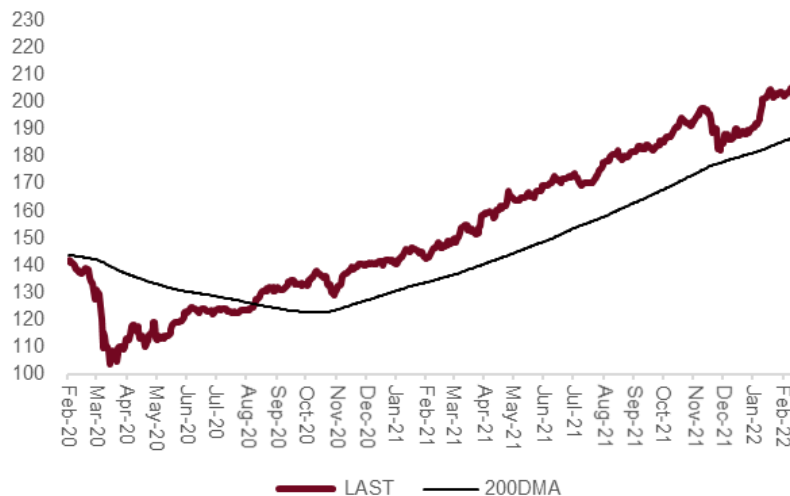




Market Watch Monday, March 21, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,875.80	0.83	1.51	2.27	14.13	14.13	11,896 SAR	2.40	19.09
Qatar (QE Index)	13,330.31	-0.50	-2.22	2.95	14.66	14.66	677 QAR	1.76	16.10
Dubai (DFMGI)	3,350.09	-1.54	-1.54	-0.14	4.82	4.82	331 AED	1.43	20.17
Abu Dhabi (ADI)	9,606.52	-0.30	-0.30	3.08	13.17	13.17	1,435 AED	1.82	21.56
Bahrain (BAX)	1,975.56	0.53	-3.79	0.61	9.92	9.92	20 BHD	1.19	17.55
MUSCAT SE INDEX	4,314.88	-0.02	-0.31	6.40	4.49	4.49	5 OMR	0.91	13.25
SP GCC Comp LMC	217.66	0.41	0.57	2.86	14.71	14.72			
Developed Markets									
MSCI World Index	3,010.96	6.02	6.02	1.11	-6.83	-6.83			
U.S. (S&P 500)	4,463.12	6.16	6.16	2.04	-6.36	-6.36			
U.K. (FTSE 100)	7,404.73	3.48	3.48	-0.72	0.27	0.27			
Japan (Topix)	1,909.27	6.10	6.10	1.18	-4.17	-4.17			
Emerging Markets									
MSCI EM Index	1,122.98	3.44	3.44	-4.13	-8.85	-8.85			
China (SSE Composite)	3,251.07	-1.77	-1.77	-6.10	-10.68	-10.68			
India (Sensex)	57,863.93	4.16	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	7,865.65	-0.05	-1.16	2.99	11.68	11.68	46.67 KWD	2.36	28.86
Kuwait Premier Index	8,690.23	-0.04	-0.75	4.45	13.76	13.76	35.61 KWD	2.57	30.03
Kuwait Main Index	6,182.27	-0.07	-2.51	-1.73	5.03	5.03	11.05 KWD	1.67	25.10
NIC 50	9,569.19	-0.33	-0.76	4.44	13.75	12.28	28.60 KWD	2.55	29.03
Kuwait Sector									
Banking	1,842.39	0.03	-0.75	4.89	13.53	13.53	27.40 KWD	1.36	31.03
Telecom	1,248.79	-0.23	-1.28	2.59	14.63	14.63	3.83 KWD	0.82	15.62
Industrials	1,253.22	-0.03	-0.85	-1.08	9.79	9.79	4.45 KWD	0.96	11.42
Financial services	1,605.30	-0.54	-1.69	1.82	12.79	12.79	4.03 KWD	0.91	24.66
Real estate	1,383.76	0.25	-0.46	2.70	4.32	4.32	2.99 KWD	0.72	53.26
Basic materials	1,146.47	-0.56	-2.10	1.32	11.87	11.87	1.02 KWD	1.90	29.46
Health care	515.27	3.65	-35.01	-36.60	-35.35	-35.35	0.26 KWD	3.23	13.17
Consumer services	720.97	0.34	-0.53	-0.15	-1.39	-1.39	0.78 KWD	0.92	16.88
Insurance	1,630.20	-0.76	-0.79	1.01	6.31	6.31	0.68 KWD	0.78	8.51
Consumer Disc	1,519.98	-0.79	1.01	-1.56	13.72	13.72	0.22 KWD	1.32	8.91
Energy	1,379.60	0.42	-0.05	0.58	-3.40	-3.40	0.29 KWD	1.00	15.18
Technology	691.13	1.06	-4.90	0.00	1.06	1.06	0.01 KWD	0.82	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 were set for a second straight weekly loss, but found a floor above \$100 a barrel on Friday after volatile trading this week with no easy replacement for Russian barrels in sight in a market already marked by tight supply, Brent crude futures advanced 1.21%, or \$1.29, to end the day at \$107.93 per barrel.

Kuwait Market

The market closed today down by – 0.05%, closed at 7,865.65 value traded 57.1 million KD, Premier market value traded reached 39.8 million KD and closed at 8,690.23 down by - 0.04%.

Saudi Market

The Market closed up today by + 0.83%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



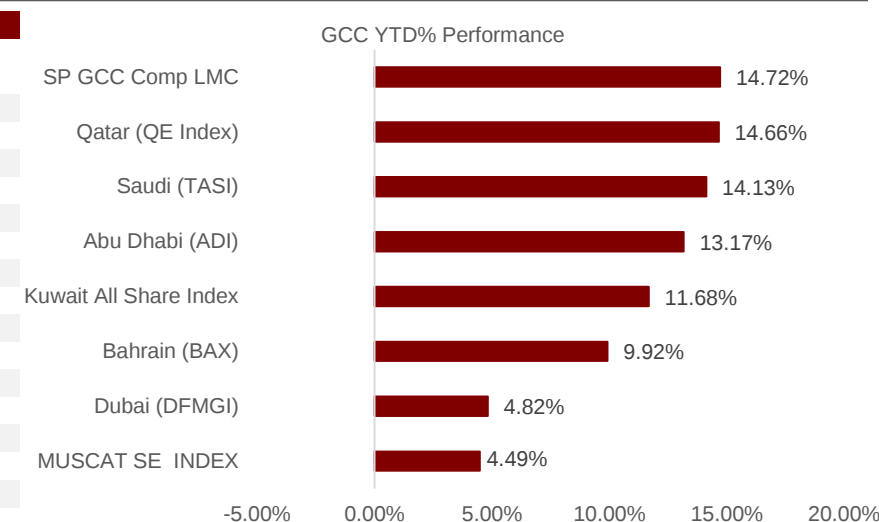
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.129	0.80	-0.44	7.01	13.24	13.24	8.13 KWD	2.04	27.00
KFH	0.988	-0.40	-1.20	4.66	18.75	18.75	8.35 KWD	3.83	32.00
Zain	0.625	-0.32	-1.26	0.81	5.04	5.04	2.71 KWD	2.27	14.56
BOUBYAN BANK	0.931	-1.48	-0.32	13.12	17.85	17.85	2.96 KWD	4.15	34.00
Agility	1.029	0.00	0.29	1.28	8.89	8.89	2.30 KWD	1.05	2.19
Saudi Arabia									
ARAMCO	43.25	3.35	5.23	4.09	20.81	20.81	8,650.00 SAR	8.09	25.32
SABIC	128.40	0.78	-2.73	3.05	10.69	10.69	385.20 SAR	2.14	35.00
STC	108.80	-0.55	-2.16	-4.56	-3.20	-3.20	217.60 SAR	3.14	19.33
AL-RAJHI BANK	158.80	-0.13	2.98	-1.00	11.99	11.99	397.00 SAR	5.90	26.96
NCB	69.00	1.47	-0.43	1.17	7.14	7.14	308.98 SAR	1.89	19.65
United Arab Emirates									
ETISALAT.AD	35.46	1.31	1.31	1.37	11.86	11.86	308.41 AED	6.48	32.67
FAB.AD	21.40	-3.60	-3.60	4.69	14.92	14.92	236.44 AED	2.07	19.68
EMIRATES NBD	13.80	-6.76	-6.76	-3.50	1.85	1.85	87.18 AED	1.04	10.00
DB ISLAMIC BK	6.01	0.17	0.17	-1.31	11.71	11.71	43.52 AED	1.12	11.39
EMAAR PROPERT	5.40	1.89	1.89	6.30	10.43	10.43	44.17 AED	0.68	10.37
Qatar									
QNB	22.51	-1.05	-0.84	3.26	11.49	11.49	208.94 QAR	2.10	17.03
INDUSTRIES QAT	19.38	0.68	-1.62	5.90	25.11	25.11	117.83 QAR	2.97	14.50
QA ISLAMIC BK	22.64	-0.26	-0.79	7.35	23.51	23.51	53.76 QAR	2.16	15.93
MASRAF AL RAYA	5.12	-0.83	0.65	2.44	10.39	10.39	47.87 QAR	1.95	22.37
MESAIEED PETRO	2.80	1.90	-7.20	4.68	33.73	33.73	35.29 QAR	2.06	18.86
OMAN									
BANK MUSCAT	0.550	0.00	-2.48	5.77	13.64	13.64	1.97 OMR	0.92	8.33
OMANTEL	0.864	0.47	0.93	6.93	14.89	14.89	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	0.61	12.71
OMINVEST	0.330	-1.20	-2.94	3.77	7.84	7.84	0.22 QAR	0.96	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 -0.05 %The leading sector bottom performance indices today are Consumer Disc -0.79 % Insurance -0.76 % Basic materials -0.56 % respectively

Telecommunication sector are down today by -0.23 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 2.95 %

KSA

Saudi Armco has a positive performance today by + 3.35 %, SABIC has a positive performance today by + 0.78 %

STC has a negative performance today by -0.55 %, Al Rajhi Bank has a negative performance today by -0.13 %

UAE

ETISALAT .AD has a positive performance today by 1.31 %, FAB.AD has a negative performance today by -3.60 %



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