

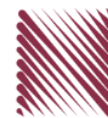


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, March 22, 2022

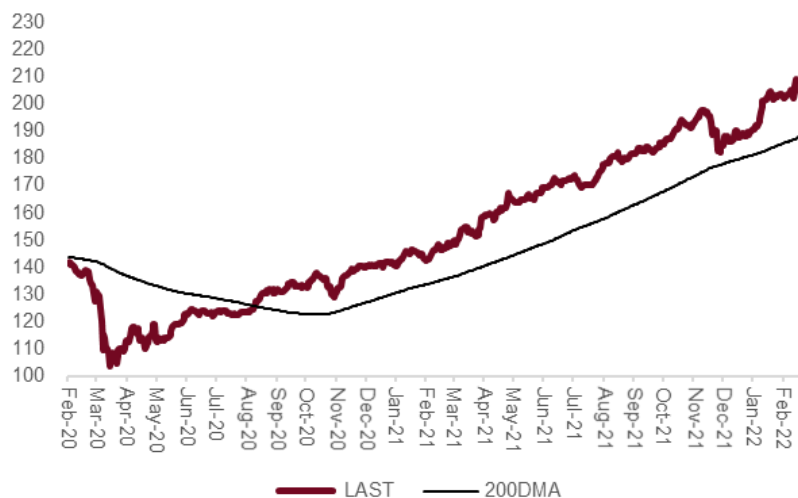




Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,881.45	0.39	1.56	2.31	14.18	14.18	11,881 SAR	2.41	19.63
Qatar (QE Index)	13,396.83	0.10	-1.73	3.46	15.23	15.23	681 QAR	1.76	16.49
Dubai (DFMGI)	3,349.56	-0.31	-1.55	-0.15	4.81	4.81	330 AED	1.39	19.87
Abu Dhabi (ADI)	9,631.79	0.72	-0.04	3.35	13.47	13.47	1,435 AED	1.82	21.25
Bahrain (BAX)	2,003.83	1.06	-2.42	2.05	11.49	11.49	20 BHD	1.20	17.58
MUSCAT SE INDEX	4,314.35	0.28	-0.33	6.38	4.48	4.48	5 OMR	0.91	13.25
SP GCC Comp LMC	218.22	0.46	0.83	3.13	15.00	15.01			
Developed Markets									
MSCI World Index	3,040.37	1.01	7.05	2.10	-5.92	-5.92			
U.S. (S&P 500)	4,511.61	1.13	7.31	3.15	-5.34	-5.34			
U.K. (FTSE 100)	7,476.72	0.46	4.49	0.25	1.25	1.25			
Japan (Topix)	1,933.74	1.28	7.46	2.48	-2.94	-2.94			
Emerging Markets									
MSCI EM Index	1,131.41	1.45	4.21	-3.41	-8.17	-8.17			
China (SSE Composite)	3,259.86	0.19	-1.51	-5.85	-10.44	-10.44			
India (Sensex)	57,989.30	1.22	4.39	3.10	-0.45	-0.45			
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,934.16	0.86	-0.29	3.88	12.65	12.65	46.98 KWD	2.38	28.86
Kuwait Premier Index	8,779.84	1.10	0.27	5.52	14.93	14.93	35.90 KWD	2.60	30.15
Kuwait Main Index	6,202.19	0.04	-2.20	-1.41	5.37	5.37	11.07 KWD	1.66	24.70
NIC 50	9,663.72	1.01	0.26	5.51	14.92	13.39	28.60 KWD	2.58	29.15
Kuwait Sector									
Banking	1,862.24	1.09	0.32	6.02	14.76	14.76	27.63 KWD	1.36	31.15
Telecom	1,250.01	0.11	-1.18	2.69	14.75	14.75	3.83 KWD	0.82	15.68
Industrials	1,280.59	2.15	1.32	1.08	12.19	12.19	4.54 KWD	0.94	11.42
Financial services	1,608.57	0.21	-1.49	2.03	13.02	13.02	4.03 KWD	0.92	23.41
Real estate	1,387.07	0.33	-0.23	2.95	4.57	4.57	2.99 KWD	0.73	50.43
Basic materials	1,146.09	-0.39	-2.13	1.28	11.84	11.84	1.02 KWD	1.88	29.43
Health care	509.40	-1.14	-35.75	-37.32	-36.09	-36.09	0.25 KWD	3.21	13.01
Consumer services	713.36	-0.39	-1.58	-1.20	-2.43	-2.43	0.78 KWD	0.93	16.97
Insurance	1,626.97	-0.83	-0.98	0.81	6.10	6.10	0.68 KWD	0.78	8.47
Consumer Disc	1,527.31	-0.08	1.50	-1.08	14.27	14.27	0.22 KWD	1.30	8.85
Energy	1,372.51	-0.61	-0.56	0.06	-3.90	-3.90	0.29 KWD	0.99	15.27
Technology	691.13	0.00	-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

The European Union is unlikely to impose an immediate oil embargo on Russia over its unprovoked invasion of Ukraine, according to two CNBC sources with knowledge of the discussions, The EU's reluctance in taking action against Russian oil accentuated a dip in prices on Tuesday morning. Brent futures fell about 0.6% in early trading hours to \$114.96 a barrel.

Kuwait Market

The market closed today up by + 0.86%, closed at 7,934.16 value traded 80.4 million KD, Premier market value traded reached 67.3 million KD and closed at 8,779.84 up by + 1.10%.

Saudi Market

The Market closed up today by + 0.39%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



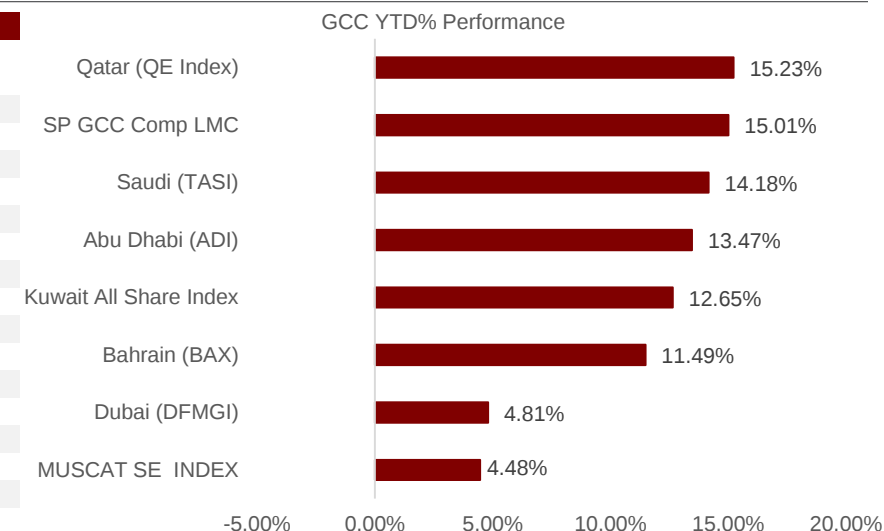
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.130	0.27	-0.35	7.11	13.34	13.34	8.12 KWD	2.04	27.00
KFH	1.000	1.21	0.00	5.93	20.19	20.19	8.44 KWD	3.88	32.00
Zain	0.624	0.00	-1.42	0.65	4.87	4.87	2.70 KWD	2.27	14.54
BOUBAYAN BANK	0.948	0.85	1.50	15.19	20.00	20.00	3.01 KWD	4.22	34.00
Agility	1.068	3.99	4.09	5.12	13.02	13.02	2.38 KWD	1.09	2.28
Saudi Arabia									
ARAMCO	43.10	0.35	4.87	3.73	20.39	20.39	8,619.54 SAR	7.74	21.73
SABIC	129.80	1.41	-1.67	4.17	11.90	11.90	389.38 SAR	2.16	35.00
STC	107.40	-1.83	-3.42	-5.79	-4.45	-4.45	214.79 SAR	3.10	19.33
AL-RAJHI BANK	155.20	-1.90	0.65	-3.24	9.45	9.45	387.98 SAR	5.76	26.82
NCB	71.10	1.57	2.60	4.25	10.40	10.40	318.37 SAR	1.94	20.23
United Arab Emirates									
ETISALAT.AD	35.42	1.03	1.20	1.26	11.74	11.74	308.06 AED	6.47	33.06
FAB.AD	21.92	1.95	-1.26	7.23	17.71	17.71	242.18 AED	2.15	19.88
EMIRATES NBD	13.95	-1.06	-5.74	-2.45	2.95	2.95	88.12 AED	1.06	10.11
DB ISLAMIC BK	6.05	0.83	0.83	-0.66	12.45	12.45	43.81 AED	1.12	11.47
EMAAR PROPERT	5.35	0.00	0.94	5.31	9.41	9.41	43.77 AED	0.71	10.28
Qatar									
QNB	22.75	0.66	0.22	4.36	12.68	12.68	210.88 QAR	2.12	17.21
INDUSTRIES QAT	19.48	0.46	-1.12	6.45	25.76	25.76	118.27 QAR	2.98	14.57
QA ISLAMIC BK	22.94	0.13	0.53	8.77	25.15	25.15	54.40 QAR	2.19	16.14
MASRAF AL RAYA	5.15	0.43	1.20	3.00	10.99	10.99	48.07 QAR	1.96	22.49
MESAIEED PETRO	2.89	2.78	-4.15	8.13	38.13	38.13	36.40 QAR	2.12	19.48
OMAN									
BANK MUSCAT	0.533	1.08	-0.71	7.69	15.70	15.70	1.99 OMR	0.93	8.33
OMANTEL	0.880	0.00	2.80	8.91	17.02	17.02	0.66 OMR	1.17	7.69
BANK DHOFAR	0.118	0.00	0.85	7.27	-6.35	-6.35	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	0.61	12.71
OMINVEST	0.326	0.00	-4.12	2.52	6.54	6.54	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 up today by + 0.86 %The leading sector best performance indices today are Industrials 2.15 % Banking 1.09 % Real estate 0.33 % respectively

Telecommunication sector are up today by + 0.11 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 2.1 %

KSA

Saudi Armco has a positive performance today by + 0.35 %, SABIC has a positive performance today by + 1.41 %

STC has a negative performance today by -1.83 %, Al Rajhi Bank has a negative performance today by -1.90 %

UAE

ETISALAT .AD has a positive performance today by + 1.03 %, FAB.AD has a positive performance today by + 1.95 %



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