

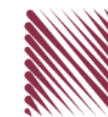


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

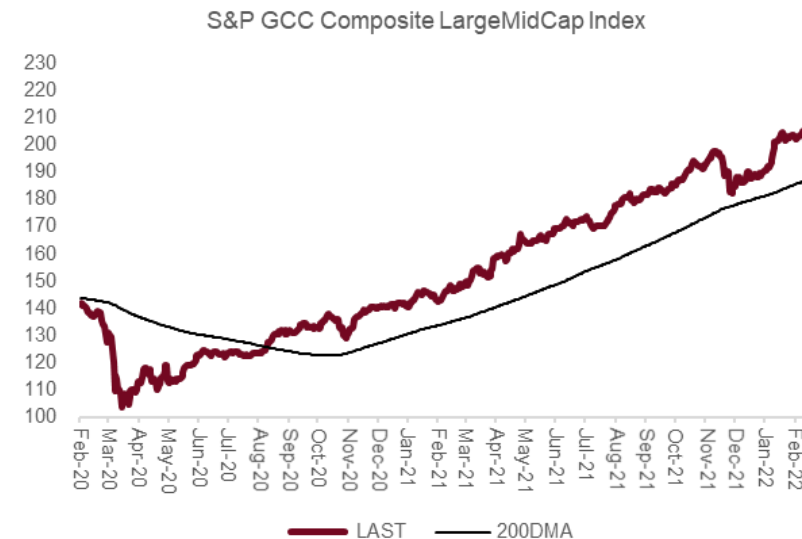
Wednesday, March 23, 2022





Market Watch Thursday, March 24, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,944.16	0.49	2.05	2.81	14.74	14.74	11,797 SAR	2.37	19.26
Qatar (QE Index)	13,525.04	0.96	-0.79	4.45	16.34	16.34	685 QAR	1.77	16.60
Dubai (DFMGI)	3,361.20	0.35	-1.21	0.20	5.17	5.17	331 AED	1.39	19.97
Abu Dhabi (ADI)	9,723.55	0.95	0.91	4.34	14.55	14.55	1,435 AED	1.76	21.66
Bahrain (BAX)	2,025.28	1.07	-1.37	3.14	12.69	12.69	20 BHD	1.19	17.60
MUSCAT SE INDEX	4,273.46	-0.95	-1.27	5.38	3.48	3.48	5 OMR	0.91	13.25
SP GCC Comp LMC	219.83	0.74	1.57	3.89	15.85	15.86			
Developed Markets									
MSCI World Index	3,012.79	-0.91	6.08	1.17	-6.77	-6.77			
U.S. (S&P 500)	4,456.24	-1.23	5.99	1.88	-6.50	-6.50			
U.K. (FTSE 100)	7,460.63	-0.22	4.26	0.03	1.03	1.03			
Japan (Topix)	1,978.70	2.33	9.96	4.86	-0.68	-0.68			
Emerging Markets									
MSCI EM Index	1,140.72	0.82	5.07	-2.61	-7.41	-7.41			
China (SSE Composite)	3,271.03	0.34	-1.17	-5.52	-10.13	-10.13			
India (Sensex)	57,684.82	-0.53	3.84	2.56	-0.98	-0.98			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,961.47	0.34	0.05	4.24	13.04	13.04	47.22 KWD	2.39	28.92
Kuwait Premier Index	8,821.24	0.47	0.74	6.02	15.47	15.47	36.15 KWD	2.61	30.22
Kuwait Main Index	6,196.21	-0.10	-2.29	-1.51	5.27	5.27	11.07 KWD	1.66	24.67
NIC 50	9,702.93	0.41	0.73	6.01	15.46	13.85	28.60 KWD	2.59	29.22
Kuwait Sector									
Banking	1,869.83	0.41	0.73	6.45	15.22	15.22	27.81 KWD	1.35	31.22
Telecom	1,250.40	0.03	-1.15	2.72	14.78	14.78	3.84 KWD	0.85	15.84
Industrials	1,287.57	0.55	1.87	1.63	12.80	12.80	4.57 KWD	0.96	11.45
Financial services	1,616.32	0.48	-1.01	2.52	13.56	13.56	4.05 KWD	0.92	23.89
Real estate	1,385.79	-0.09	-0.32	2.85	4.48	4.48	2.99 KWD	0.73	49.41
Basic materials	1,151.75	0.49	-1.65	1.78	12.39	12.39	1.03 KWD	1.89	29.55
Health care	511.54	0.42	-35.48	-37.06	-35.82	-35.82	0.25 KWD	3.21	13.01
Consumer services	712.39	-0.14	-1.71	-1.34	-2.56	-2.56	0.78 KWD	0.92	16.78
Insurance	1,630.59	0.22	-0.76	1.03	6.34	6.34	0.68 KWD	0.79	8.47
Consumer Disc	1,522.49	-0.32	1.18	-1.40	13.91	13.91	0.22 KWD	1.31	8.80
Energy	1,371.39	-0.08	-0.64	-0.02	-3.97	-3.97	0.29 KWD	0.98	15.16
Technology	727.50	5.26	0.10	5.26	6.38	6.38	0.01 KWD	0.86	0.00
Utilities	592.11	-0.44	0.00	1.81	-1.32	-1.32	0.25 KWD	3.99	19.12



What Move the GCC markets

Oil Prices

Oil prices rose on Wednesday as a reported drop in U.S. crude inventories increased concerns about tight global supplies amid the hit to Russian exports from economic sanctions, Brent crude futures climbed \$3.17, or 2.75%, to \$118.69 per barrel, after falling 14 cents in the previous session.

Kuwait Market

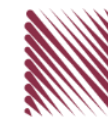
The market closed today up by + 0.34%, closed at 7,961.47 value traded 63.2 million KD, Premier market value traded reached 51.9 million KD and closed at 8,821.24 up by + 0.47%.

Saudi Market

The Market closed up today by + 0.49%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



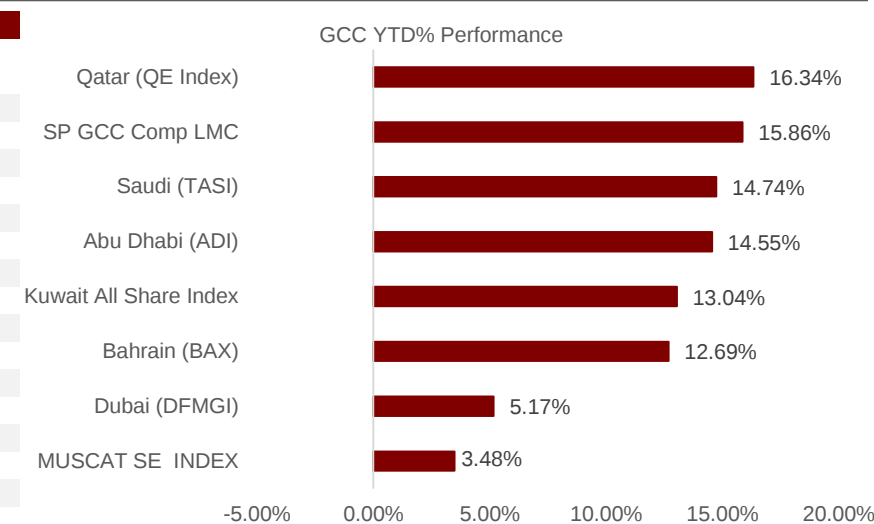
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.140	0.88	0.53	8.06	14.34	14.34	8.21 KWD	2.06	27.00
KFH	1.009	0.90	0.90	6.89	21.27	21.27	8.52 KWD	3.91	32.00
Zain	0.624	0.00	-1.42	0.65	4.87	4.87	2.70 KWD	2.27	14.54
BOUBYAN BANK	0.945	-0.32	1.18	14.82	19.62	19.62	3.01 KWD	4.21	34.00
Agility	1.081	1.22	5.36	6.40	14.39	14.39	2.41 KWD	1.10	2.30
Saudi Arabia									
ARAMCO	42.60	-1.16	3.65	2.53	18.99	18.99	8,519.55 SAR	7.65	21.80
SABIC	129.60	-0.15	-1.82	4.01	11.72	11.72	388.78 SAR	2.16	35.00
STC	108.20	0.74	-2.70	-5.09	-3.74	-3.74	216.39 SAR	3.12	18.97
AL-RAJHI BANK	157.40	1.42	2.08	-1.87	11.00	11.00	393.48 SAR	5.85	26.31
NCB	72.00	1.27	3.90	5.57	11.80	11.80	322.40 SAR	1.97	20.55
United Arab Emirates									
ETISALAT.AD	36.00	1.64	2.86	2.92	13.56	13.56	313.06 AED	6.58	33.60
FAB.AD	22.46	2.46	1.17	9.88	20.61	20.61	248.11 AED	2.20	20.37
EMIRATES NBD	14.05	0.72	-5.07	-1.75	3.69	3.69	88.74 AED	1.06	10.18
DB ISLAMIC BK	6.05	0.00	0.83	-0.66	12.45	12.45	43.80 AED	1.12	11.47
EMAAR PROPERT	5.40	0.93	1.89	6.30	10.43	10.43	44.17 AED	0.72	10.37
Qatar									
QNB	22.90	0.66	0.88	5.05	13.42	13.42	211.51 QAR	2.14	17.32
INDUSTRIES QAT	19.78	1.54	0.41	8.09	27.70	27.70	119.67 QAR	3.03	14.79
QA ISLAMIC BK	23.50	2.44	2.98	11.43	28.21	28.21	55.53 QAR	2.24	16.53
MASRAF AL RAYA	5.13	-0.39	0.81	2.60	10.56	10.56	47.71 QAR	1.95	22.40
MESAIEED PETRO	3.02	4.68	0.33	13.18	44.59	44.59	37.97 QAR	2.22	20.39
OMAN									
BANK MUSCAT	0.516	-3.25	-3.94	4.19	11.94	11.94	1.92 OMR	0.89	8.33
OMANTEL	0.892	1.36	4.21	10.40	18.62	18.62	0.67 OMR	1.18	7.69
BANK DHOFAR	0.120	1.69	2.56	9.09	-4.76	-4.76	0.35 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	0.330	1.23	-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 up today by + 0.34 %The leading sector best performance indices today are Technology 5.26 % Industrials 0.55 % Basic materials 0.49 % respectively

Telecommunication sector are up today by + 0.03 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 1.74 %

KSA

Saudi Armco have negative performance today by -1.16 %, SABIC have negative performance today by -0.15 %

STC has a positive performance today by + 0.74 %, Al Rajhi Bank has a positive performance today by + 1.42 %

UAE

ETISALAT .AD has a positive performance today by + 1.64 %, FAB.AD has a positive performance today by + 2.46 %



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