



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, March 24, 2022





Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,948.37	0.03	2.08	2.84	14.77	14.77	11,800 SAR	2.39	19.26
Qatar (QE Index)	13,631.97	0.79	-0.01	5.28	17.26	17.26	689 QAR	1.80	17.02
Dubai (DFMGI)	3,412.18	0.54	-0.67	0.74	5.74	5.74	336 AED	1.43	20.17
Abu Dhabi (ADI)	9,768.66	0.20	1.12	4.55	14.79	14.79	1,435 AED	1.75	21.68
Bahrain (BAX)	2,032.83	0.37	-1.01	3.52	13.11	13.11	20 BHD	1.19	17.38
MUSCAT SE INDEX	4,281.17	0.18	-1.09	5.57	3.67	3.67	5 OMR	0.91	13.25
SP GCC Comp LMC	220.63	0.26	1.84	4.16	16.15	16.17			

Developed Markets

MSCI World Index	3,049.11	0.95	7.09	2.13	-5.89	-5.89			
U.S. (S&P 500)	4,543.06	1.43	7.51	3.34	-5.16	-5.16			
U.K. (FTSE 100)	7,483.35	0.09	4.36	0.12	1.12	1.12			
Japan (Topix)	1,981.47	0.14	10.11	5.02	-0.54	-0.54			

Emerging Markets

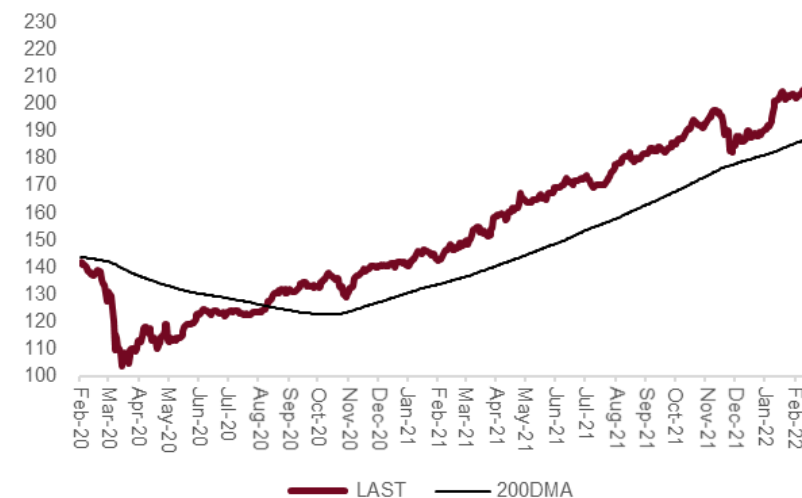
MSCI EM Index	1,125.01	-0.33	4.72	-2.93	-7.72	-7.72			
China (SSE Composite)	3,212.24	-0.63	-1.80	-6.12	-10.70	-10.70			
India (Sensex)	57,362.20	-0.15	3.68	2.40	-1.13	-1.13			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	8,042.64	1.02	1.07	5.30	14.19	14.19	47.74 KWD	2.42	29.08
Kuwait Premier Index	8,926.14	1.19	1.94	7.28	16.85	16.85	36.64 KWD	2.64	30.44
Kuwait Main Index	6,222.73	0.43	-1.87	-1.09	5.72	5.72	11.10 KWD	1.68	24.59
NIC 50	9,809.63	1.10	1.93	7.27	16.84	15.10	28.60 KWD	2.62	29.44

Kuwait Sector

Banking	1,893.12	1.25	1.98	7.77	16.66	16.66	28.11 KWD	1.35	31.44
Telecom	1,266.42	1.28	0.11	4.03	16.25	16.25	3.88 KWD	0.86	16.28
Industrials	1,290.60	0.24	2.11	1.87	13.06	13.06	4.58 KWD	0.95	11.43
Financial services	1,632.12	0.98	-0.04	3.52	14.67	14.67	4.18 KWD	0.90	23.77
Real estate	1,393.84	0.58	0.26	3.45	5.08	5.08	3.01 KWD	0.73	49.27
Basic materials	1,160.79	0.78	-0.88	2.58	13.27	13.27	1.03 KWD	1.88	29.70
Health care	511.54	0.00	-35.48	-37.06	-35.82	-35.82	0.25 KWD	3.21	13.01
Consumer services	715.14	0.39	-1.33	-0.96	-2.18	-2.18	0.79 KWD	0.92	16.78
Insurance	1,618.54	-0.74	-1.50	0.29	5.55	5.55	0.68 KWD	0.79	8.47
Consumer Disc	1,534.29	0.78	1.96	-0.63	14.79	14.79	0.22 KWD	1.32	10.67
Energy	1,376.73	0.39	-0.26	0.37	-3.60	-3.60	0.29 KWD	0.98	15.21
Technology	727.50	0.00	0.10	5.26	6.38	6.38	0.01 KWD	0.86	0.00
Utilities	594.74	0.44	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

Crude prices moved between gains and losses in volatile trading on Thursday as investors assessed the potential for new supply in the tight markets amid prospects of a new Iran deal, Brent futures were up 29 cents at \$121.90 a barrel.

Kuwait Market

The market closed today up by + 1.02%, closed at 8,042.64 value traded 71.9 million KD, Premier market value traded reached 54.8 million KD and closed at 8,926.14 up by + 1.19%.

Saudi Market

The Market closed up today by + 0.03%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



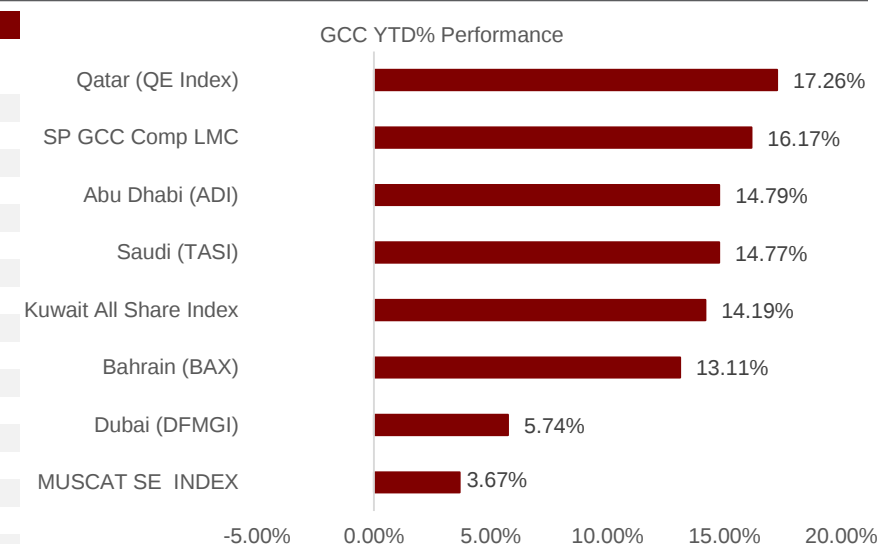
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.150	0.88	1.41	9.00	15.35	15.35	8.27 KWD	2.08	27.00
KFH	1.026	1.68	2.60	8.69	23.32	23.32	8.66 KWD	3.98	32.00
Zain	0.630	0.96	-0.47	1.61	5.88	5.88	2.73 KWD	2.29	14.68
BOUBAYAN BANK	0.955	1.06	2.25	16.04	20.89	20.89	3.04 KWD	4.25	34.00
Agility	1.084	0.28	5.65	6.69	14.71	14.71	2.42 KWD	1.11	2.31
Saudi Arabia									
ARAMCO	42.60	0.00	3.65	2.53	18.99	18.99	8,520.00 SAR	7.65	21.55
SABIC	129.80	0.15	-1.67	4.17	11.90	11.90	389.40 SAR	2.16	35.00
STC	108.20	0.00	-2.70	-5.09	-3.74	-3.74	216.40 SAR	3.12	19.11
AL-RAJHI BANK	156.20	-0.76	1.30	-2.62	10.16	10.16	390.50 SAR	5.80	26.68
NCB	71.50	-0.69	3.17	4.84	11.02	11.02	320.18 SAR	1.96	20.81
United Arab Emirates									
ETISALAT.AD	36.00	0.00	2.86	2.92	13.56	13.56	313.08 AED	6.58	33.60
FAB.AD	22.58	0.53	1.71	10.46	21.25	21.25	252.33 AED	2.24	20.48
EMIRATES NBD	14.30	1.78	-3.38	0.00	5.54	5.54	90.96 AED	1.09	10.37
DB ISLAMIC BK	6.05	0.00	0.83	-0.66	12.45	12.45	43.81 AED	1.12	11.47
EMAAR PROPERT	5.45	0.93	2.83	7.28	11.45	11.45	45.64 AED	0.74	10.47
Qatar									
QNB	23.25	1.53	2.42	6.65	15.16	15.16	214.25 QAR	2.17	17.59
INDUSTRIES QAT	19.80	0.10	0.51	8.20	27.82	27.82	119.51 QAR	3.03	14.81
QA ISLAMIC BK	23.85	1.49	4.51	13.09	30.11	30.11	56.22 QAR	2.28	16.78
MASRAF AL RAYA	5.14	0.19	1.00	2.80	10.78	10.78	47.69 QAR	1.95	22.45
MESAIEED PETRO	3.03	0.26	0.60	13.48	44.98	44.98	37.98 QAR	2.23	20.45
OMAN									
BANK MUSCAT	0.516	0.00	-3.94	4.19	11.94	11.94	1.94 OMR	0.90	8.33
OMANTEL	0.900	0.90	5.14	11.39	19.68	19.68	0.68 OMR	1.20	7.69
BANK DHOFAR	0.120	0.00	2.56	9.09	-4.76	-4.76	0.35 QAR	0.51	14.93
NAT BANK OF OMAN	0.208	-0.95	-2.80	9.47	5.58	5.58	0.34 QAR	0.61	12.71
OMINVEST	0.340	3.03	0.00	6.92	11.11	11.11	0.22 QAR	0.98	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
16-Mar-22	21.54%	12.62%	0.06%	0.47%	0.37%	6.19%	2.46%	10.60%	5.30%	4.25%
23-Mar-22	21.77%	12.72%	0.06%	0.48%	0.37%	6.78%	2.51%	10.62%	5.38%	4.03%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 1.02 %The leading sector best performance indices today are Telecom 1.28 % Banking 1.25 % Financial services 0.98 % respectively

Telecommunication sector are up today by + 1.28 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 2.06 %

KSA

Saudi Armco has a flat performance today, SABIC has a positive performance today by + 0.15 %

STC has a flat performance today, Al Rajhi Bank has a negative performance today by -0.76 %

UAE

ETISALAT AD has a flat performance today, FAB.AD has a positive performance today by + 0.53 %



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