

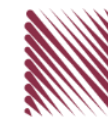


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, March 28, 2022





Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	13,064.11	0.50	2.31	3.76	15.80	15.80	11,753 SAR	2.41	19.19
Qatar (QE Index)	13,711.86	-0.14	2.35	5.89	17.94	17.94	689 QAR	1.81	17.44
Dubai (DFMGI)	3,484.38	2.12	4.01	3.87	9.03	9.03	342 AED	1.44	20.78
Abu Dhabi (ADI)	9,829.35	0.62	2.32	5.47	15.80	15.80	1,435 AED	1.75	21.65
Bahrain (BAX)	2,075.40	-0.24	5.61	5.69	15.48	15.48	21 BHD	1.19	17.43
MUSCAT SE INDEX	4,232.54	-1.04	-1.93	4.37	2.49	2.49	5 OMR	0.90	13.25
SP GCC Comp LMC	223.05	0.47	2.90	5.41	17.55	17.56			

Developed Markets

MSCI World Index	3,061.63	0.41	1.70	2.81	-5.26	-5.26			
U.S. (S&P 500)	4,575.52	0.71	2.52	4.61	-4.00	-4.00			
U.K. (FTSE 100)	7,473.14	-0.14	0.92	0.20	1.20	1.20			
Japan (Topix)	1,973.37	-0.41	3.36	4.58	-0.95	-0.95			

Emerging Markets

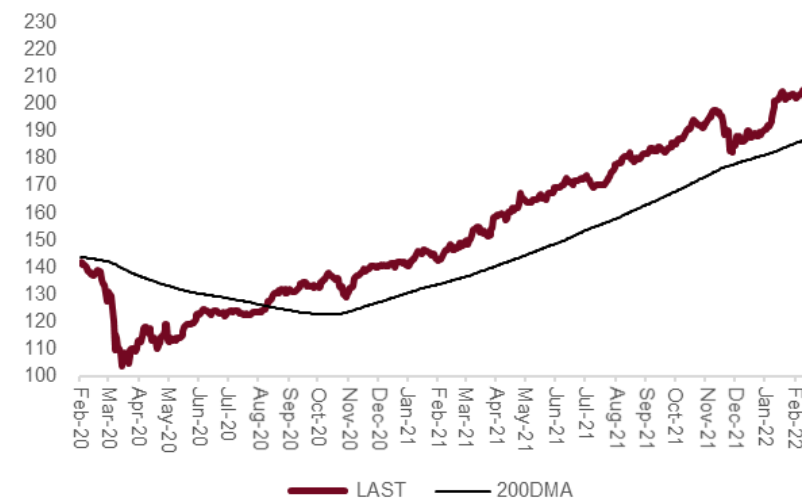
MSCI EM Index	1,124.82	-0.02	0.16	-3.97	-8.70	-8.70			
China (SSE Composite)	3,214.50	0.07	-1.12	-7.16	-11.68	-11.68			
India (Sensex)	57,593.49	0.40	-0.47	2.39	-1.13	-1.13			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	8,124.34	0.09	3.24	6.37	15.35	15.35	48.26 KWD	2.45	29.55
Kuwait Premier Index	9,037.06	0.18	3.94	8.61	18.30	18.30	37.14 KWD	2.68	30.75
Kuwait Main Index	6,236.35	-0.25	0.80	-0.87	5.95	5.95	11.12 KWD	1.67	25.56
NIC 50	9,922.60	0.18	3.93	8.60	18.29	16.43	28.60 KWD	2.66	29.75

Kuwait Sector

Banking	1,924.89	0.39	4.51	9.58	18.62	18.62	28.62 KWD	1.36	31.75
Telecom	1,255.94	-0.89	0.34	3.17	15.29	15.29	3.85 KWD	0.77	16.16
Industrials	1,296.26	-0.32	3.41	2.32	13.56	13.56	4.60 KWD	0.96	11.39
Financial services	1,646.59	-0.12	2.02	4.44	15.69	15.69	4.23 KWD	0.92	24.23
Real estate	1,402.52	0.53	1.61	4.09	5.74	5.74	3.03 KWD	0.73	48.68
Basic materials	1,158.90	-0.53	0.52	2.42	13.09	13.09	1.03 KWD	1.85	29.67
Health care	495.41	-3.15	-0.34	-39.04	-37.84	-37.84	0.25 KWD	3.05	13.01
Consumer services	712.01	-0.10	-0.91	-1.39	-2.61	-2.61	0.79 KWD	0.93	16.91
Insurance	1,577.02	-2.14	-4.00	-2.29	2.85	2.85	0.66 KWD	0.78	10.02
Consumer Disc	1,536.63	0.20	0.29	-0.48	14.96	14.96	0.22 KWD	1.31	10.65
Energy	1,337.47	-1.84	-2.65	-2.50	-6.35	-6.35	0.28 KWD	0.98	14.62
Technology	691.13	0.00	1.06	0.00	1.06	1.06	0.01 KWD	0.82	0.00
Utilities	592.11	0.45	-0.44	1.81	-1.32	-1.32	0.25 KWD	3.99	19.12

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices fell more than \$5 on Monday as fears over weaker fuel demand in China grew after its financial hub of Shanghai launched a planned two-stage lockdown on Monday to contain a surge in COVID-19 infections, Brent crude futures traded \$5.27, or 4.4%, lower at \$115.44 per barrel.

Kuwait Market

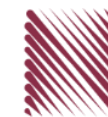
The market closed today up by + 0.09%, closed at 8,124.34 value traded 78.6 million KD, Premier market value traded reached 61.4 million KD and closed at 9,037.06 up by + 0.18%.

Saudi Market

The Market closed up today by + 0.50%, 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	1.100	0.00	3.13	9.48	15.85	15.85	8.31 KWD	2.09	27.00
KFH	1.058	0.86	6.65	12.08	27.16	27.16	8.93 KWD	4.10	32.00
Zain	0.625	-0.79	-0.32	0.81	5.04	5.04	2.70 KWD	2.27	14.56
BOUBAYAN BANK	0.954	0.42	0.95	15.92	20.76	20.76	3.03 KWD	4.25	34.00
Agility	1.098	-0.27	6.71	8.07	16.19	16.19	2.45 KWD	1.15	2.36
Saudi Arabia									
ARAMCO	42.05	0.48	0.48	1.20	17.46	17.46	8,410.45 SAR	7.55	21.17
SABIC	131.60	0.61	3.30	5.62	13.45	13.45	394.82 SAR	2.19	35.00
STC	109.20	0.18	-0.18	-4.21	-2.85	-2.85	218.41 SAR	3.15	19.26
AL-RAJHI BANK	160.00	0.63	0.63	-0.25	12.83	12.83	400.02 SAR	5.94	26.96
NCB	72.10	0.56	6.03	5.72	11.96	11.96	322.88 SAR	1.97	20.72
United Arab Emirates									
ETISALAT.AD	36.00	0.00	1.52	2.92	13.56	13.56	313.08 AED	6.58	33.60
FAB.AD	23.36	2.28	9.16	14.28	25.44	25.44	258.07 AED	2.29	21.18
EMIRATES NBD	14.70	2.08	6.52	2.80	8.49	8.49	92.85 AED	1.11	10.66
DB ISLAMIC BK	6.15	1.65	2.33	0.99	14.31	14.31	44.53 AED	1.14	11.66
EMAAR PROPERT	5.85	4.84	8.33	15.16	19.63	19.63	47.85 AED	0.78	11.24
Qatar									
QNB	23.40	-0.34	2.86	7.34	15.90	15.90	215.07 QAR	2.18	17.70
INDUSTRIES QAT	19.67	-0.35	2.18	7.49	26.99	26.99	118.42 QAR	3.01	14.71
QA ISLAMIC BK	24.50	-0.33	7.93	16.17	33.66	33.66	57.61 QAR	2.34	17.24
MASRAF AL RAYA	5.19	1.21	0.56	3.88	11.94	11.94	48.07 QAR	1.97	22.68
MESAIEED PETRO	2.96	-1.66	7.91	10.86	41.63	41.63	37.00 QAR	2.18	19.97
OMAN									
BANK MUSCAT	0.510	-1.16	-2.64	2.98	10.64	10.64	1.93 OMR	0.89	8.33
OMANTEL	0.840	-8.70	-2.33	3.96	11.70	11.70	0.69 OMR	1.22	7.69
BANK DHOFAR	0.120	0.00	-0.83	9.09	-4.76	-4.76	0.35 QAR	0.51	14.93
NAT BANK OF OMAN	0.198	-3.41	-5.71	4.21	0.51	0.51	0.32 QAR	0.57	12.71
OMINVEST	0.336	-1.18	0.60	5.66	9.80	9.80	0.23 QAR	0.99	6.85

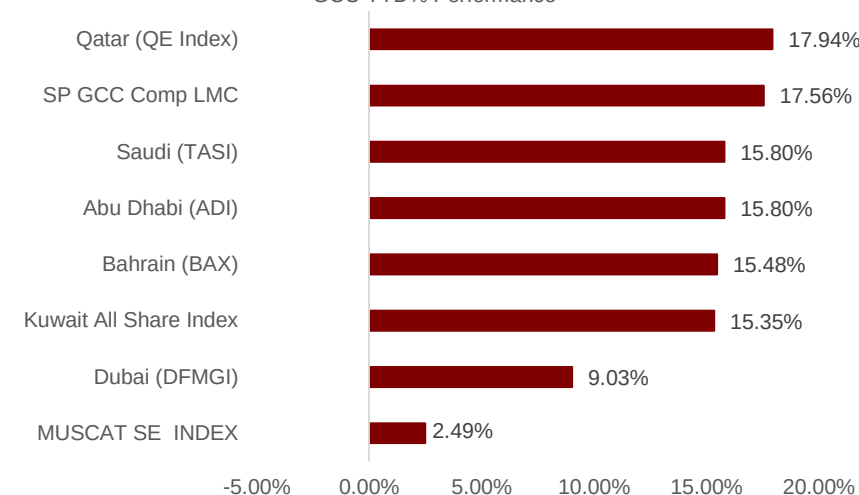
Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
16-Mar-22	21.54%	12.62%	0.06%	0.47%	0.37%	6.19%	2.46%	10.60%	5.30%	4.25%
23-Mar-22	21.77%	12.72%	0.06%	0.48%	0.37%	6.78%	2.51%	10.62%	5.38%	4.03%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC

GCC YTD% Performance



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.09 %The leading sector best performance indices today are Real estate 0.53 % Utilities 0.45 % Banking 0.39 % respectively

Telecommunication sector are down today by -0.89 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-0.06 %

KSA

Saudi Armco has a positive performance today by + 0.48 %, SABIC has a positive performance today by + 0.61 %

STC has a positive performance today by + 0.18 %, Al Rajhi Bank has a positive performance today by + 0.63 %

UAE

ETISALAT .AD flat performance today, FAB.AD has a positive performance today by + 2.28 %



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