



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, March 29, 2022





Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	13,101.36	0.29	2.60	4.06	16.13	16.13	11,742 SAR	2.41	20.16
Qatar (QE Index)	13,638.79	-0.53	1.80	5.33	17.31	17.31	688 QAR	1.80	17.24
Dubai (DFMGI)	3,515.24	0.89	4.93	4.79	9.99	9.99	345 AED	1.45	20.92
Abu Dhabi (ADI)	9,901.67	0.74	3.07	6.25	16.65	16.65	1,435 AED	1.76	21.77
Bahrain (BAX)	2,078.53	0.15	5.77	5.85	15.65	15.65	21 BHD	1.19	17.55
MUSCAT SE INDEX	4,194.99	-0.89	-2.80	3.44	1.58	1.58	5 OMR	0.91	13.25
SP GCC Comp LMC	223.44	0.17	3.08	5.59	17.75	17.75			

Developed Markets

MSCI World Index	3,110.81	1.61	3.33	4.46	-3.74	-3.74			
U.S. (S&P 500)	4,631.60	1.23	3.77	5.89	-2.82	-2.82			
U.K. (FTSE 100)	7,537.25	0.86	1.79	1.06	2.07	2.07			
Japan (Topix)	1,991.66	0.93	4.32	5.55	-0.03	-0.03			

Emerging Markets

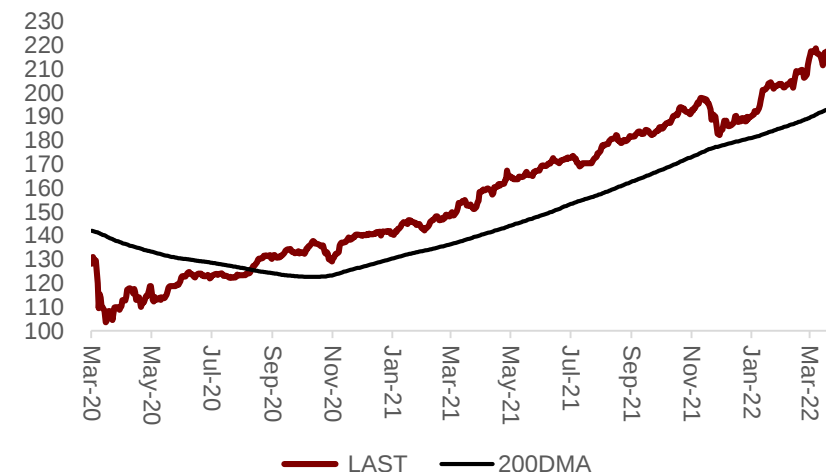
MSCI EM Index	1,136.45	1.03	1.20	-2.98	-7.76	-7.76			
China (SSE Composite)	3,203.94	-0.33	-1.45	-7.46	-11.97	-11.97			
India (Sensex)	57,943.65	0.61	0.14	3.02	-0.53	-0.53			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	8,128.05	0.05	3.28	6.42	15.40	15.40	48.25 KWD	2.46	29.60
Kuwait Premier Index	9,035.55	-0.02	3.93	8.60	18.28	18.28	37.11 KWD	2.68	30.93
Kuwait Main Index	6,253.03	0.27	1.07	-0.60	6.23	6.23	11.14 KWD	1.67	25.20
NIC 50	9,974.42	0.52	3.92	8.59	18.27	17.04	28.60 KWD	2.66	29.93

Kuwait Sector

Banking	1,926.02	0.06	4.58	9.65	18.69	18.69	28.62 KWD	1.36	31.93
Telecom	1,248.65	-0.58	-0.24	2.57	14.62	14.62	3.83 KWD	0.83	16.14
Industrials	1,292.83	-0.26	3.13	2.05	13.26	13.26	4.59 KWD	0.96	11.40
Financial services	1,659.27	0.77	2.80	5.24	16.58	16.58	4.26 KWD	0.91	24.23
Real estate	1,396.04	-0.46	1.14	3.61	5.25	5.25	3.01 KWD	0.73	50.63
Basic materials	1,168.11	0.79	1.31	3.23	13.99	13.99	1.04 KWD	1.87	29.85
Health care	486.14	-1.87	-2.21	-40.19	-39.01	-39.01	0.24 KWD	3.05	12.36
Consumer services	712.07	0.01	-0.90	-1.38	-2.60	-2.60	0.79 KWD	0.94	16.96
Insurance	1,614.36	2.37	-1.72	0.03	5.28	5.28	0.68 KWD	0.77	10.17
Consumer Disc	1,537.25	0.04	0.33	-0.44	15.01	15.01	0.22 KWD	1.31	10.62
Energy	1,323.61	-1.04	-3.66	-3.51	-7.32	-7.32	0.28 KWD	0.92	17.42
Technology	727.50	5.26	6.38	5.26	6.38	6.38	0.01 KWD	0.86	0.00
Utilities	592.11	0.00	-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 Tuesday 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 at \$110.23 per barrel.

Kuwait Market

The market closed today up by + 0.05%, closed at 8,128.05 value traded 49.8 million KD, Premier market value traded reached 33.9 million KD and closed at 9,035.55 down by - 0.02%.

Saudi Market

The Market closed up today by + 0.29%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.094	-0.55	2.56	8.88	15.22	15.22	8.26 KWD	2.08	27.00
KFH	1.062	0.38	7.06	12.50	27.64	27.64	8.96 KWD	4.12	32.00
Zain	0.619	-0.96	-1.28	-0.16	4.03	4.03	2.68 KWD	2.25	14.42
BOUBAYAN BANK	0.953	-0.10	0.85	15.80	20.63	20.63	3.03 KWD	4.24	34.00
Agility	1.092	-0.55	6.12	7.48	15.56	15.56	2.43 KWD	1.14	2.35
Saudi Arabia									
ARAMCO	41.90	-0.36	0.12	0.84	17.04	17.04	8,382.68 SAR	7.52	21.27
SABIC	131.00	-0.46	2.83	5.14	12.93	12.93	393.13 SAR	2.18	35.00
STC	108.60	-0.55	-0.73	-4.74	-3.38	-3.38	217.27 SAR	3.13	19.29
AL-RAJHI BANK	161.00	0.63	1.26	0.37	13.54	13.54	402.63 SAR	5.98	27.13
NCB	72.50	0.55	6.62	6.30	12.58	12.58	324.76 SAR	1.98	20.84
United Arab Emirates									
ETISALAT.AD	35.96	-0.11	1.41	2.80	13.44	13.44	312.76 AED	6.57	33.57
FAB.AD	23.90	2.31	11.68	16.92	28.34	28.34	264.06 AED	2.34	21.67
EMIRATES NBD	14.80	0.68	7.25	3.50	9.23	9.23	93.49 AED	1.12	10.73
DB ISLAMIC BK	6.15	0.00	2.33	0.99	14.31	14.31	44.53 AED	1.14	11.66
EMAAR PROPERT	5.97	2.05	10.56	17.52	22.09	22.09	48.84 AED	0.79	11.47
Qatar									
QNB	23.21	-0.81	2.02	6.47	14.96	14.96	214.38 QAR	2.17	17.56
INDUSTRIES QAT	19.34	-1.68	0.47	5.68	24.85	24.85	117.01 QAR	2.96	14.47
QA ISLAMIC BK	24.22	-1.14	6.70	14.84	32.13	32.13	57.23 QAR	2.31	17.04
MASRAF AL RAYA	5.20	0.10	0.66	3.98	12.05	12.05	48.35 QAR	1.98	22.70
MESAIEED PETRO	2.91	-1.69	6.09	8.99	39.23	39.23	36.56 QAR	2.14	19.64
OMAN									
BANK MUSCAT	0.512	0.39	-2.25	3.38	11.07	11.07	1.92 OMR	0.89	8.33
OMANTEL	0.852	1.43	-0.93	5.45	13.30	13.30	0.64 OMR	1.13	7.69
BANK DHOFAR	0.117	-2.50	-3.31	6.36	-7.14	-7.14	0.35 QAR	0.51	14.93
NAT BANK OF OMAN	0.198	0.00	-5.71	4.21	0.51	0.51	0.32 QAR	0.57	12.71
OMINVEST	0.340	1.19	1.80	6.92	11.11	11.11	0.23 QAR	0.99	6.85

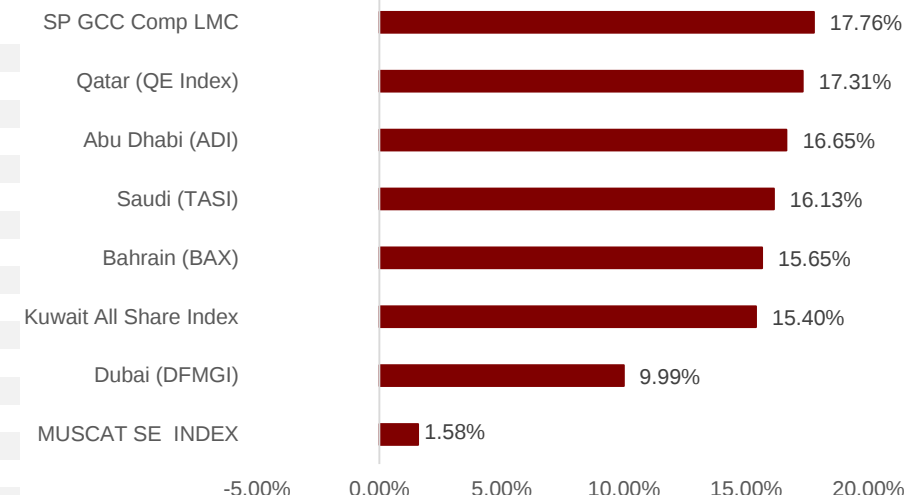
Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
16-Mar-22	21.54%	12.62%	0.06%	0.47%	0.37%	6.19%	2.46%	10.60%	5.30%	4.25%
23-Mar-22	21.77%	12.72%	0.06%	0.48%	0.37%	6.78%	2.51%	10.62%	5.38%	4.03%

End of Report

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed and others authorized to receive it.

Sources, Bursa Kuwait , Refinitiv , NIC

GCC YTD% Performance



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.05 %The leading sector best performance indices today are Technology 5.26 % Insurance 2.37 % Basic materials 0.79 % respectively

Telecommunication sector are down today by -0.58 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -0.78 %

KSA

Saudi Armco has a negative performance today by -0.36 %, SABIC has a negative performance today by -0.46 %

STC has a negative performance today by -0.55 %, Al Rajhi Bank has a positive performance today by + 0.63 %

UAE

ETISALAT .AD has a negative performance today by -0.11 %, FAB.AD has a positive performance today by + 2.31 %



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw