

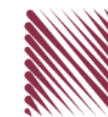


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, March 30, 2022

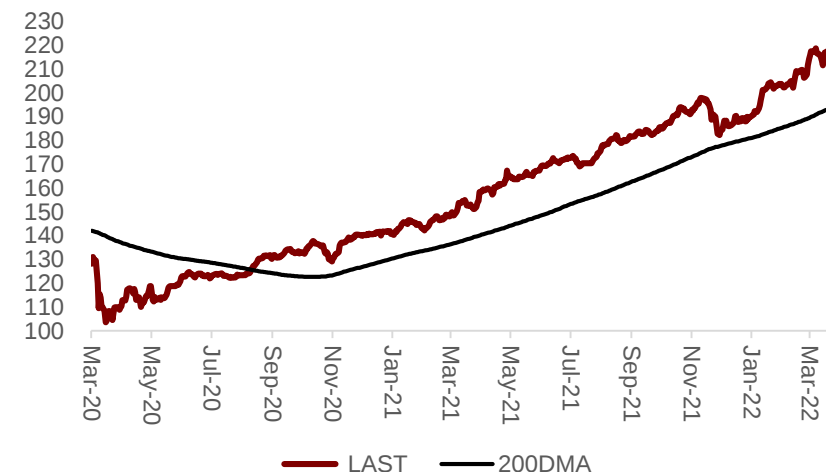




Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	13,038.22	-0.48	2.11	3.56	15.57	15.57	11,680 SAR	2.45	20.64
Qatar (QE Index)	13,557.00	-0.60	1.19	4.70	16.61	16.61	683 QAR	1.80	17.00
Dubai (DFMGI)	3,527.39	0.35	5.29	5.15	10.37	10.37	345 AED	1.46	20.84
Abu Dhabi (ADI)	9,845.99	-0.56	2.49	5.65	15.99	15.99	1,435 AED	1.76	20.28
Bahrain (BAX)	2,061.94	-0.80	4.93	5.01	14.73	14.73	21 BHD	1.19	17.54
MUSCAT SE INDEX	4,202.57	0.18	-2.62	3.63	1.77	1.77	5 OMR	0.91	13.25
SP GCC Comp LMC	222.20	-0.56	2.51	5.01	17.10	17.11			
Developed Markets									
MSCI World Index	3,096.67	-0.45	2.86	3.99	-4.18	-4.18			
U.S. (S&P 500)	4,602.45	-0.63	3.12	5.22	-3.44	-3.44			
U.K. (FTSE 100)	7,578.75	0.55	2.35	1.62	2.63	2.63			
Japan (Topix)	1,967.60	-1.21	3.06	4.28	-1.24	-1.24			
Emerging Markets									
MSCI EM Index	1,149.30	1.13	2.34	-1.88	-6.71	-6.71			
China (SSE Composite)	3,266.60	1.96	0.48	-5.65	-10.25	-10.25			
India (Sensex)	58,683.99	1.28	1.42	4.33	0.74	0.74			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	8,136.92	0.11	3.40	6.54	15.53	15.53	48.26 KWD	2.46	29.57
Kuwait Premier Index	9,050.34	0.16	4.10	8.77	18.47	18.47	37.14 KWD	2.69	30.78
Kuwait Main Index	6,247.75	-0.08	0.99	-0.69	6.14	6.14	11.12 KWD	1.68	25.54
NIC 50	9,989.58	0.15	4.09	8.76	18.46	17.21	28.60 KWD	2.67	29.78
Kuwait Sector									
Banking	1,927.27	0.06	4.64	9.72	18.76	18.76	28.61 KWD	1.35	31.78
Telecom	1,253.70	0.40	0.16	2.99	15.08	15.08	3.84 KWD	0.83	16.19
Industrials	1,297.34	0.35	3.49	2.40	13.65	13.65	4.60 KWD	0.96	11.40
Financial services	1,661.16	0.11	2.92	5.36	16.71	16.71	4.26 KWD	0.89	24.04
Real estate	1,394.78	-0.09	1.05	3.52	5.15	5.15	3.01 KWD	0.74	50.65
Basic materials	1,168.30	0.02	1.33	3.25	14.00	14.00	1.04 KWD	1.86	29.87
Health care	493.99	1.61	-0.63	-39.22	-38.02	-38.02	0.24 KWD	3.05	13.01
Consumer services	711.05	-0.14	-1.04	-1.52	-2.74	-2.74	0.79 KWD	0.94	16.96
Insurance	1,614.82	0.03	-1.70	0.06	5.31	5.31	0.67 KWD	0.77	10.25
Consumer Disc	1,537.65	0.03	0.36	-0.41	15.04	15.04	0.22 KWD	1.31	10.60
Energy	1,304.78	-1.42	-5.03	-4.88	-8.64	-8.64	0.27 KWD	0.94	17.26
Technology	691.13	-5.00	1.06	0.00	1.06	1.06	0.01 KWD	0.82	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 dived more than \$5 a barrel on Thursday as the United States is considering the release of up to 180 million barrels from its strategic petroleum reserve (SPR) over several months to calm soaring crude prices, Brent futures for May fell \$5.47, or 4.8%, to \$107.98 a barrel.

Kuwait Market

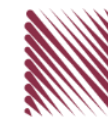
The market closed today up by + 0.11%, closed at 8,136.92 value traded 62.4 million KD, Premier market value traded reached 47.9 million KD and closed at 9,050.34 up by + 0.16%.

Saudi Market

The Market closed down today by - 0.48%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



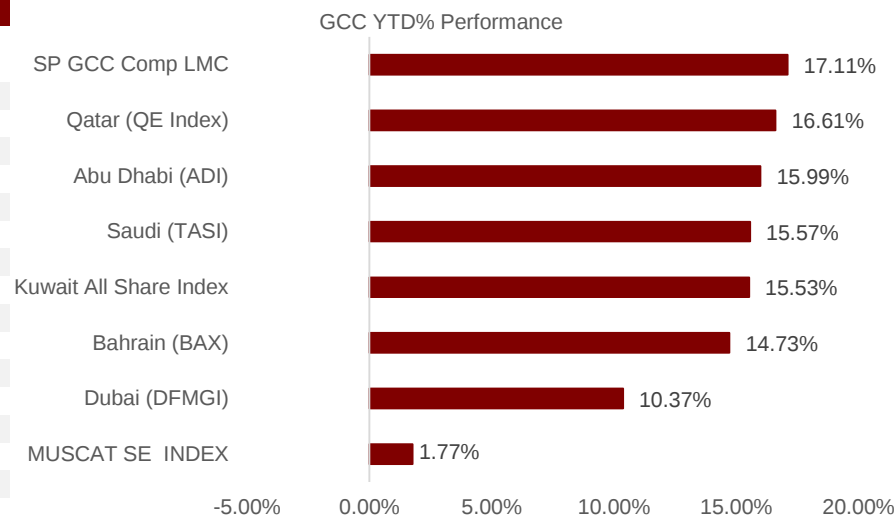
	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.096	0.18	2.75	9.08	15.43	15.43	8.26 KWD	2.08	27.00
KFH	1.069	0.66	7.76	13.24	28.49	28.49	9.01 KWD	4.15	32.00
Zain	0.622	0.48	-0.80	0.32	4.54	4.54	2.69 KWD	2.26	14.49
BOUBYAN BANK	0.947	-0.63	0.21	15.07	19.87	19.87	3.01 KWD	4.22	34.00
Agility	1.094	0.18	6.32	7.68	15.77	15.77	2.44 KWD	1.14	2.36
Saudi Arabia									
ARAMCO	41.70	-0.48	-0.36	0.36	16.48	16.48	8,338.00 SAR	7.49	21.19
SABIC	130.00	-0.76	2.04	4.33	12.07	12.07	389.91 SAR	2.16	35.00
STC	108.00	-0.55	-1.28	-5.26	-3.91	-3.91	215.95 SAR	3.11	19.18
AL-RAJHI BANK	159.80	-0.75	0.50	-0.37	12.69	12.69	399.40 SAR	5.94	27.30
NCB	71.80	-0.97	5.59	5.28	11.49	11.49	321.44 SAR	1.96	20.96
United Arab Emirates									
ETISALAT.AD	36.00	0.11	1.52	2.92	13.56	13.56	313.06 AED	6.58	33.60
FAB.AD	23.42	-2.01	9.44	14.57	25.76	25.76	258.71 AED	2.29	21.24
EMIRATES NBD	14.95	1.01	8.33	4.55	10.33	10.33	94.43 AED	1.13	10.84
DB ISLAMIC BK	6.15	0.00	2.33	0.99	14.31	14.31	44.53 AED	1.14	11.66
EMAAR PROPERT	6.05	1.34	12.04	19.09	23.72	23.72	49.48 AED	0.80	11.62
Qatar									
QNB	23.13	-0.34	1.67	6.10	14.56	14.56	213.64 QAR	2.16	17.49
INDUSTRIES QAT	19.00	-1.76	-1.30	3.83	22.66	22.66	114.95 QAR	2.91	14.21
QA ISLAMIC BK	24.20	-0.08	6.61	14.75	32.02	32.02	57.18 QAR	2.31	17.02
MASRAF AL RAYA	5.14	-1.12	-0.46	2.82	10.80	10.80	47.81 QAR	1.95	22.45
MESAIEED PETRO	2.85	-2.13	3.83	6.67	36.27	36.27	35.78 QAR	2.10	19.22
OMAN									
BANK MUSCAT	0.510	-0.39	-2.64	2.98	10.64	10.64	1.92 OMR	0.89	8.33
OMANTEL	0.860	0.94	0.00	6.44	14.36	14.36	0.64 OMR	1.14	7.69
BANK DHOFAR	0.115	-1.71	-4.96	4.55	-8.73	-8.73	0.34 QAR	0.49	14.93
NAT BANK OF OMAN	0.202	2.02	-3.81	6.32	2.54	2.54	0.33 QAR	0.59	12.71
OMINVEST	0.340	0.00	1.80	6.92	11.11	11.11	0.23 QAR	1.00	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 + 0.11 %The leading sector best performance indices today are Health care 1.61 % Telecom 0.4 % Industrials 0.35 % respectively

Telecommunication sector are up today by + 0.4 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-0.44 %

KSA

Saudi Armco have negative performance today by -0.48 %, SABIC have negative performance today by -0.76 %

STC have negative performance today by -0.55 %, Al Rajhi Bank have negative performance today by -0.75 %

UAE

ETISALAT .AD has a positive performance today by + 0.11 %, FAB.AD have negative performance today by -2.01 %



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