



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, March 31, 2022

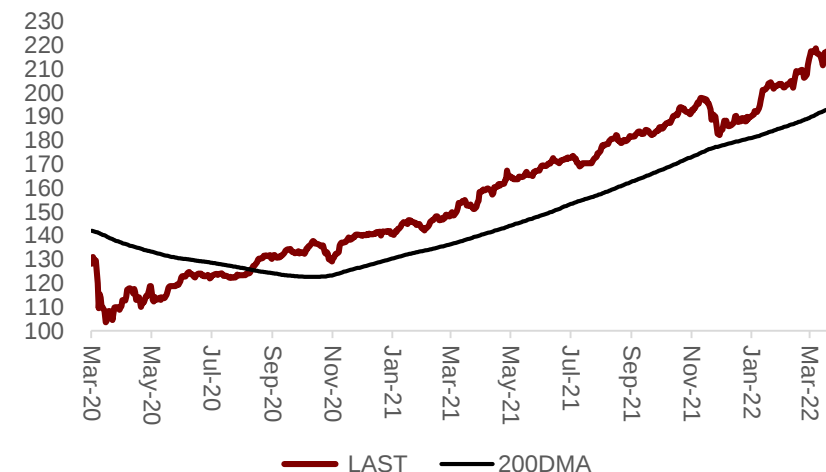




Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	13,090.40	0.40	2.52	3.97	16.03	16.03	11,962 SAR	2.41	20.92
Qatar (QE Index)	13,533.16	-0.18	1.01	4.51	16.41	16.41	697 QAR	1.82	16.91
Dubai (DFMGI)	3,536.65	-0.02	5.27	5.13	10.35	10.35	346 AED	1.44	20.79
Abu Dhabi (ADI)	9,928.69	1.04	3.56	6.75	17.20	17.20	1,435 AED	1.76	20.25
Bahrain (BAX)	2,073.54	0.56	5.52	5.60	15.37	15.37	21 BHD	1.19	17.55
MUSCAT SE INDEX	4,205.20	0.06	-2.56	3.69	1.83	1.83	5 OMR	0.91	13.25
SP GCC Comp LMC	222.69	0.24	2.76	5.26	17.38	17.40			
Developed Markets									
MSCI World Index	3,057.07	-1.41	1.41	2.52	-5.53	-5.53			
U.S. (S&P 500)	4,545.86	-1.57	1.51	3.58	-4.95	-4.95			
U.K. (FTSE 100)	7,537.90	-0.83	1.50	0.77	1.78	1.78			
Japan (Topix)	1,944.27	-1.08	1.94	3.15	-2.31	-2.31			
Emerging Markets									
MSCI EM Index	1,145.85	-0.65	1.67	-2.52	-7.32	-7.32			
China (SSE Composite)	3,282.72	-0.44	0.03	-6.07	-10.65	-10.65			
India (Sensex)	59,276.69	-0.20	1.22	4.13	0.54	0.54			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	8,146.69	0.12	3.52	6.67	15.67	15.67	48.44 KWD	2.46	29.39
Kuwait Premier Index	9,061.41	0.12	4.22	8.91	18.62	18.62	37.28 KWD	2.68	30.90
Kuwait Main Index	6,254.76	0.11	1.10	-0.58	6.26	6.26	11.16 KWD	1.67	24.36
NIC 50	10,009.24	0.20	4.21	8.90	18.61	17.45	28.60 KWD	2.66	29.90
Kuwait Sector									
Banking	1,930.19	0.15	4.80	9.88	18.94	18.94	28.73 KWD	1.36	31.90
Telecom	1,262.17	0.68	0.84	3.69	15.86	15.86	3.87 KWD	0.82	16.19
Industrials	1,294.96	-0.18	3.30	2.22	13.44	13.44	4.61 KWD	0.96	14.32
Financial services	1,660.80	-0.02	2.90	5.34	16.68	16.68	4.26 KWD	0.88	23.90
Real estate	1,395.24	0.03	1.08	3.55	5.19	5.19	3.02 KWD	0.73	23.64
Basic materials	1,161.74	-0.56	0.76	2.67	13.36	13.36	1.04 KWD	1.88	29.71
Health care	495.03	0.21	-0.42	-39.09	-37.89	-37.89	0.25 KWD	3.05	13.01
Consumer services	711.75	0.10	-0.94	-1.43	-2.65	-2.65	0.79 KWD	0.93	16.87
Insurance	1,621.22	0.40	-1.31	0.45	5.73	5.73	0.68 KWD	0.78	10.10
Consumer Disc	1,542.97	0.35	0.71	-0.07	15.44	15.44	0.22 KWD	1.32	10.60
Energy	1,298.79	-0.46	-5.47	-5.32	-9.06	-9.06	0.27 KWD	0.94	16.66
Technology	676.58	-2.11	-1.06	-2.11	-1.06	-1.06	0.01 KWD	0.80	0.00
Utilities	586.84	-0.89	-1.33	0.90	-2.19	-2.19	0.25 KWD	3.95	18.95

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

LONDON — Oil prices dropped sharply on Thursday after reports that U.S. President Joe Biden is considering the release of up to 180 million barrels from the country's strategic petroleum reserve (SPR). International benchmark Brent crude futures for May fell by around 5.8% to \$106.85 per barrel

Kuwait Market

The market closed today up by + 0.12%, closed at 8,146.69 value traded 70.3 million KD, Premier market value traded reached 45.9 million KD and closed at 9,061.41 up by + 0.12%.

Saudi Market

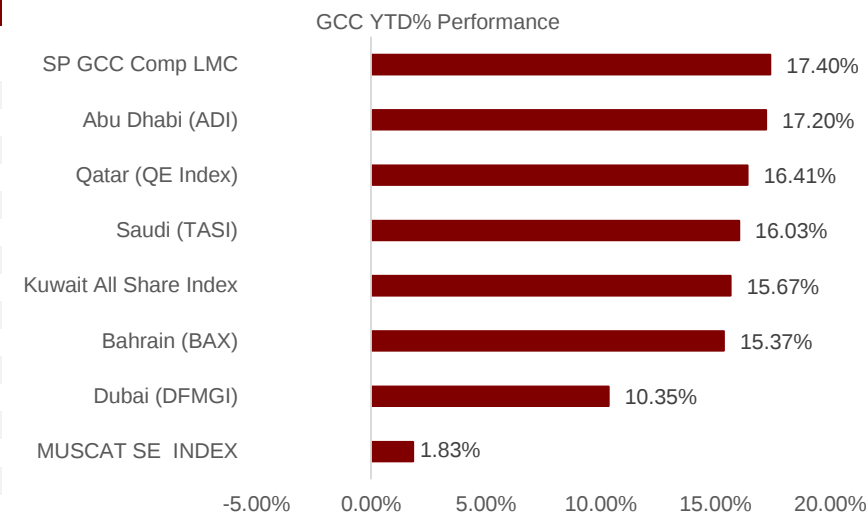
The Market closed up today by + 0.40%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

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	1.099	0.27	3.03	9.38	15.74	15.74	8.31 KWD	2.09	27.00	
KFH	1.071	0.19	7.96	13.45	28.73	28.73	9.05 KWD	4.15	32.00	
Zain	0.628	0.96	0.16	1.29	5.55	5.55	2.72 KWD	2.28	14.63	
BOUBYAN BANK	0.939	-0.84	-0.63	14.09	18.86	18.86	2.99 KWD	4.18	34.00	
Agility	1.105	1.01	7.39	8.76	16.93	16.93	2.47 KWD	1.16	2.38	
Saudi Arabia										
ARAMCO	43.10	3.36	2.99	3.73	20.39	20.39	8,619.54 SAR	7.74	21.09	
SABIC	131.00	0.77	2.83	5.14	12.93	12.93	392.98 SAR	2.18	35.00	
STC	107.80	-0.19	-1.46	-5.44	-4.09	-4.09	215.59 SAR	3.11	19.08	
AL-RAJHI BANK	160.60	0.50	1.01	0.12	13.26	13.26	401.48 SAR	5.97	27.09	
NCB	70.90	-1.25	4.26	3.96	10.09	10.09	317.47 SAR	1.94	20.75	
United Arab Emirates										
ETISALAT.AD	36.96	2.67	4.23	5.66	16.59	16.59	324.21 AED	6.81	34.50	
FAB.AD	23.60	0.77	10.28	15.45	26.73	26.73	258.74 AED	2.29	21.40	
EMIRATES NBD	15.00	0.33	8.70	4.90	10.70	10.70	94.75 AED	1.13	10.87	
DB ISLAMIC BK	6.17	0.33	2.66	1.31	14.68	14.68	44.89 AED	1.15	11.70	
EMAAR PROPERT	6.00	-0.83	11.11	18.11	22.70	22.70	49.00 AED	0.79	11.53	
Qatar										
QNB	23.07	-0.26	1.41	5.83	14.26	14.26	213.08 QAR	2.15	17.45	
INDUSTRIES QAT	19.00	0.00	-1.30	3.83	22.66	22.66	114.95 QAR	2.91	14.21	
QA ISLAMIC BK	23.84	-1.49	5.02	13.04	30.06	30.06	56.33 QAR	2.28	16.77	
MASRAF AL RAYA	5.17	0.56	0.10	3.40	11.42	11.42	48.08 QAR	1.96	22.58	
MESAIEED PETRO	2.91	2.18	6.09	8.99	39.23	39.23	36.56 QAR	2.14	19.64	
OMAN										
BANK MUSCAT	0.510	0.00	-2.64	2.98	10.64	10.64	1.91 OMR	0.89	8.33	
OMANTEL	0.876	1.86	1.86	8.42	16.49	16.49	0.66 OMR	1.17	7.69	
BANK DHOFAR	0.115	0.00	-4.96	4.55	-8.73	-8.73	0.34 QAR	0.49	14.93	
NAT BANK OF OMAN	0.205	1.49	-2.38	7.89	4.06	4.06	0.33 QAR	0.60	12.71	
OMINVEST	0.338	-0.59	1.20	6.29	10.46	10.46	0.23 QAR	0.99	6.85	
Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
23-Mar-22	21.77%	12.72%	0.06%	0.48%	0.37%	6.78%	2.51%	10.62%	5.38%	4.03%
30-Mar-22	21.89%	12.79%	0.06%	0.48%	0.36%	6.89%	2.55%	10.67%	5.44%	3.98%



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.12 %The leading sector best performance indices today are Telecom 0.68 % Insurance 0.4 % Consumer Disc 0.35 % respectively

Telecommunication sector are up today by + 0.68 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 0.19 %

KSA

Saudi Armco has a positive performance today by + 3.36 %, SABIC have positive performance today by + 0.77 %

STC have negative performance today by -0.19 %, Al Rajhi Bank has a positive performance today by + 0.50 %

UAE

ETISALAT .AD has a positive performance today by + 2.67 %, FAB.AD has a positive performance today by + 0.77 %

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, Boursa Kuwait , Refinitiv , NIC



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