



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, January 12, 2022



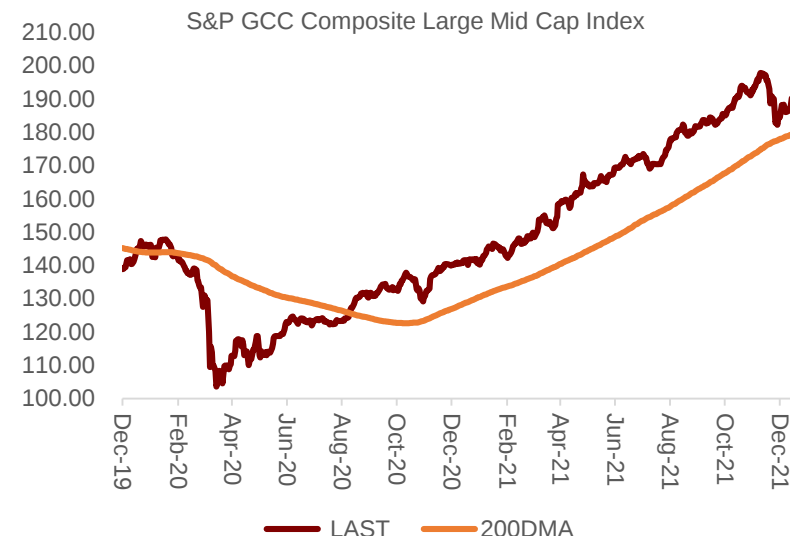


Market Watch

Wednesday, January 12, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,957.080	0.96	5.99	5.99	5.99	5.99	10,193 SAR	2.55	18.56
Qatar (QE Index)	12,163.220	0.92	4.62	4.62	4.62	4.62	606 QAR	1.73	16.24
Dubai (DFMGI)	3,208.140	0.01	0.38	0.38	0.38	0.38	320 AED	1.56	24.14
Abu Dhabi (ADI)	8,371.350	0.46	-1.38	-1.38	-1.38	-1.28	1,435 AED	1.83	16.67
Bahrain (BAX)	1,792.633	-0.13	0.59	-0.26	-0.26	-0.26	18 BHD	1.52	9.97
MUSCAT SE INDEX	4,258.214	0.79	3.12	3.12	3.12	3.12	5 OMR	0.90	13.25
SP GCC Comp LMC	198.942	0.95	4.85	4.85	4.85	4.85			
Developed Markets									
MSCI World Index	3,214.190	0.65	-0.71	-0.71	-0.71	-0.71			
U.S. (S&P 500)	4,726.350	0.28	-1.10	-1.10	-1.10	-1.10			
U.K. (FTSE 100)	7,372.100	-0.02	-0.42	-0.42	-0.42	-0.42			
Japan (Topix)	2,019.360	1.64	1.36	1.36	1.36	1.36			
Emerging Markets									
MSCI EM Index	1,267.339	1.95	3.65	3.65	3.65	3.65			
China (SSE Composite)	3,597.432	0.84	-0.60	-0.60	-0.60	-0.60			
India (Sensex)	61,150.040	0.88	5.81	5.81	5.81	5.81			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,303.88	0.63	3.70	3.70	3.70	3.70	43.06 KWD	2.17	27.53
Kuwait Premier Index	7,938.38	0.85	3.92	3.92	3.92	3.92	32.19 KWD	2.31	27.39
Kuwait Main Index	6,065.69	-0.06	3.05	3.05	3.05	3.05	10.87 KWD	1.76	28.05
NIC 50	8,855.61	0.67	-3.91	3.91	3.91	3.91	28.60 KWD	2.29	26.39
Kuwait Sector									
Banking	1,693.80	0.63	4.38	4.38	4.38	4.38	24.99 KWD	1.37	28.39
Telecom	1,102.08	0.23	1.17	1.17	1.17	1.17	3.37 KWD	0.91	15.21
Industrials	1,167.57	1.04	2.28	2.28	2.28	2.28	4.10 KWD	0.88	14.17
Financial services	1,487.59	0.49	4.52	4.52	4.52	4.52	3.83 KWD	0.88	13.80
Real estate	1,365.58	0.81	2.95	2.95	2.95	2.95	2.92 KWD	0.74	50.22
Basic materials	1,040.07	0.68	1.49	1.49	1.49	1.49	0.92 KWD	1.90	27.44
Health care	797.27	0.00	0.14	0.14	0.14	0.14	0.40 KWD	6.16	12.01
Consumer services	735.87	0.84	0.65	0.65	0.65	0.65	0.76 KWD	0.93	15.75
Insurance	1,497.96	-2.20	-2.31	-2.31	-2.31	-2.31	0.64 KWD	0.85	8.56
Consumer Disc	1,507.65	2.62	12.79	12.79	12.79	12.79	0.22 KWD	1.34	8.90
Energy	1,441.81	1.77	0.96	0.96	0.96	0.96	0.29 KWD	1.03	14.96
Technology	719.50	-3.98	5.21	5.21	5.21	5.21	0.01 KWD	0.89	0.00
Utilities	600.00	0.00	0.00	0.00	0.00	0.00	0.25 KWD	4.04	19.37



What Move the GCC markets

Oil Prices

Oil prices steadied on Wednesday after rising in the previous session on expectations that fuel demand will continue to strengthen as the U.S. Federal Reserve is likely to raise interest rates more slowly than expected, Brent crude futures were up 2 cents at \$83.74 a barrel.

Kuwait Market

The market closed today up by + 0.63%, closed at 7,303.88 value traded 87.0 million KD, Premier market value traded reached 50.0 million KD and closed at 7,938.38 up by + 0.85%

Saudi Market

The Market closed up today by + 0.96%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



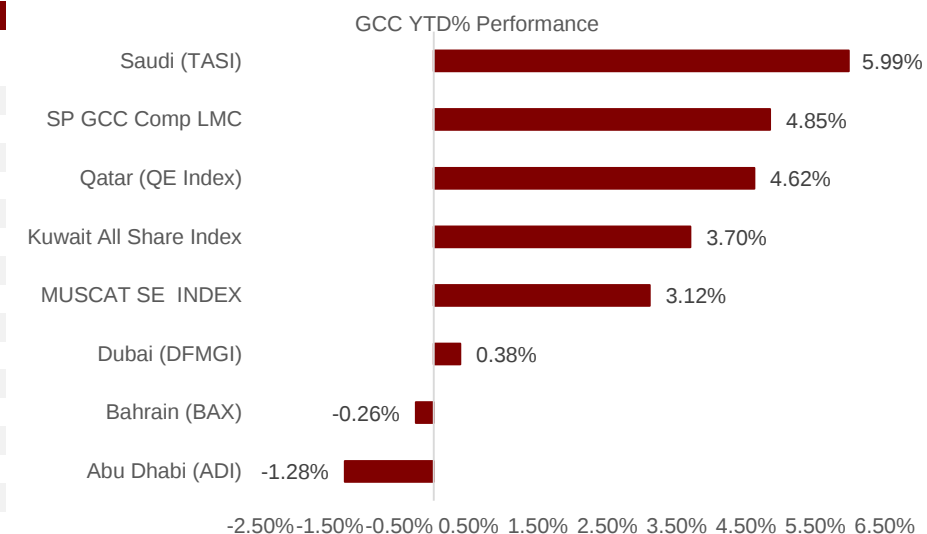
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.035	0.29	1.78	3.51	3.51	3.51	7.42 KWD	1.91	27.00
KFH	0.874	0.92	4.19	4.69	4.69	4.69	7.31 KWD	3.36	32.00
Zain	0.600	0.00	0.50	0.84	0.84	0.84	2.60 KWD	2.18	13.74
BOUBYAN BANK	0.830	0.61	1.97	4.94	4.94	4.94	2.62 KWD	3.74	34.00
Agility	0.989	2.17	3.47	4.02	4.02	4.02	2.16 KWD	0.99	2.06
Saudi Arabia									
ARAMCO	36.35	0.97	1.54	1.54	1.54	1.54	7,200.00 SAR	6.74	21.57
SABIC	121.00	0.67	4.31	4.31	4.31	4.31	360.60 SAR	2.07	35.00
STC	111.80	0.36	-0.53	-0.53	-0.53	-0.53	222.80 SAR	3.25	19.76
AL-RAJHI BANK	150.60	0.53	6.21	6.21	6.21	6.21	374.50 SAR	5.88	26.27
NCB	71.90	1.27	11.65	11.65	11.65	11.65	317.94 SAR	1.97	20.07
United Arab Emirates									
ETISALAT.AD	30.00	1.83	-2.47	-5.36	-5.36	-5.36	256.21 AED	5.56	27.76
FAB.AD	19.00	0.21	2.48	0.85	0.85	0.85	207.04 AED	1.89	17.04
EMIRATES NBD	13.15	-0.75	-1.87	-2.95	-2.95	-2.95	83.69 AED	0.98	10.49
DB ISLAMIC BK	5.50	0.00	0.18	2.23	2.23	2.23	39.82 AED	1.04	14.67
EMAAR PROPERT	4.98	0.20	0.20	1.84	1.84	1.84	40.65 AED	0.62	12.90
Qatar									
QNB	20.720	2.47	2.63	2.63	2.63	2.63	186.76 QAR	1.86	15.86
INDUSTRIES QAT	16.000	0.00	3.29	3.29	3.29	3.29	96.80 QAR	2.59	14.53
QA ISLAMIC BK	19.500	0.52	6.38	6.38	6.38	6.38	45.84 QAR	1.92	14.47
MASRAF AL RAYA	4.999	-0.02	7.74	7.74	7.74	7.74	46.50 QAR	2.53	16.84
MESAIEED PETRO	2.400	3.40	14.83	14.83	14.83	14.83	29.16 QAR	1.75	17.79
OMAN									
BANK MUSCAT	0.518	0.00	2.37	7.02	7.02	7.02	1.85 OMR	0.88	8.33
OMANTEL	0.768	0.00	-0.52	2.13	2.13	2.13	0.58 OMR	1.02	7.69
BANK DHOFAR	0.135	3.85	5.47	7.14	7.14	7.14	0.39 QAR	0.55	14.93
NAT BANK OF OMAN	0.205	4.06	4.06	4.06	4.06	4.06	0.32 QAR	0.58	12.71
OMINVEST	0.310	0.00	-1.90	1.31	1.31	1.31	0.25 QAR	0.91	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
29-Dec-21	20.76%	12.46%	0.06%	0.38%	0.41%	4.48%	2.68%	10.34%	5.23%	4.57%
5-Jan-22	20.86%	12.53%	0.06%	0.38%	0.40%	4.83%	2.66%	10.35%	5.24%	4.44%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.63 %The leading sector best performance indices today are Consumer Disc 2.62 % Energy 1.77 % Industrials 1.04 % respectively

Telecommunication sector are up today by + 0.23 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-2.39 %

KSA

Saudi Armco has a positive performance today by + 0.97 %, SABIC have positive performance today by + 0.67 %

STC has a positive performance today by + 0.36 %, Al Rajhi Bank has a positive performance today by + 0.53 %

UAE

ETISALAT AD closed up today by + 1.83 %, and act defensively with COVID19



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