



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, February 14, 2022





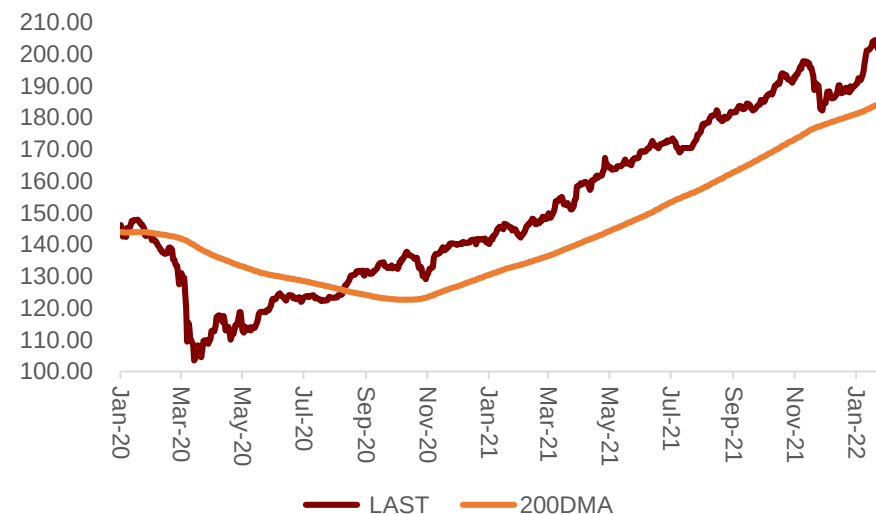
Market Watch

Monday, February 14, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	12,204.58	1.46	-0.52	-0.55	8.18	8.18	10,445 SAR	2.53	19.18
Qatar (QE Index)	12,693.09	0.44	-0.90	1.56	9.18	9.18	641 QAR	1.81	14.56
Dubai (DFMGI)	3,257.49	0.30	0.00	1.70	1.93	1.93	324 AED	1.48	22.65
Abu Dhabi (ADI)	8,998.45	-1.18	0.00	3.38	6.01	6.01	1,435 AED	1.85	35.20
Bahrain (BAX)	1,853.373	-1.00	-0.75	2.41	3.12	3.12	19 BHD	1.52	10.11
MUSCAT SE INDEX	4,084.282	-0.08	-0.20	-0.77	-1.10	-1.10	5 OMR	0.87	13.25
SP GCC Comp LMC	204.398	1.08	-0.16	0.41	7.73	7.73			
Developed Markets									
MSCI World Index	3,011.45	-0.91	-0.91	-1.56	-6.97	-6.97			
U.S. (S&P 500)	4,401.67	-0.38	-0.38	-2.52	-7.89	-7.89			
U.K. (FTSE 100)	7,531.59	-1.69	-1.69	0.90	1.74	1.74			
Japan (Topix)	1,930.65	-1.63	-1.63	1.83	-3.10	-3.10			
Emerging Markets									
MSCI EM Index	1,240.507	1.65	-0.85	2.67	1.45	1.45			
China (SSE Composite)	3,462.948	0.99	-0.66	2.01	-4.32	-4.32			
India (Sensex)	58,152.920	3.10	-1.31	0.24	0.62	0.62			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	7,458.47	0.54	-0.26	1.47	5.90	5.90	44.20 KWD	2.23	26.71
Kuwait Premier Index	8,076.65	0.56	-0.07	0.80	5.73	5.73	33.02 KWD	2.35	26.07
Kuwait Main Index	6,261.980	0.47	-0.85	3.53	6.38	6.38	11.18 KWD	1.85	28.69
NIC 50	8,982.840	0.00	-0.03	0.80	5.40	5.40	28.60 KWD	2.33	25.07
Kuwait Sector									
Banking	1,711.030	0.37	-0.05	0.49	5.44	5.44	25.39 KWD	1.40	27.07
Telecom	1,202.140	1.82	0.28	9.47	10.35	10.35	3.69 KWD	0.91	14.12
Industrials	1,224.050	1.13	-0.04	3.17	7.23	7.23	4.35 KWD	1.02	14.47
Financial services	1,527.860	0.46	-1.19	0.62	7.34	7.34	3.89 KWD	0.86	21.94
Real estate	1,334.580	0.33	-1.38	-1.14	0.62	0.62	2.88 KWD	0.73	51.46
Basic materials	1,131.490	-0.16	-0.55	1.77	10.41	10.41	1.01 KWD	1.85	29.46
Health care	820.19	0.00	0.00	1.65	2.91	2.91	0.41 KWD	6.16	13.70
Consumer services	724.380	0.38	-0.85	0.03	-0.92	-0.92	0.76 KWD	0.91	15.70
Insurance	1,607.520	-0.28	0.45	5.19	4.83	4.83	0.67 KWD	0.81	8.68
Consumer Disc	1,489.020	-0.17	-1.16	3.80	11.40	11.40	0.22 KWD	1.30	8.94
Energy	1,386.170	0.20	-1.67	-3.99	-2.94	-2.94	0.29 KWD	1.00	15.00
Technology	712.220	2.19	-4.95	-5.87	4.15	4.15	0.01 KWD	0.84	0.00
Utilities	586.840	0.90	0.00	-0.45	-2.19	-2.19	0.25 KWD	3.95	18.78

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

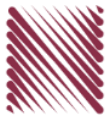
Oil prices on Monday hit their highest in more than seven years on fears that a possible invasion of Ukraine by Russia could trigger U.S. and European sanctions that would disrupt exports from the world's top producer in an already tight market, Brent crude futures was at \$95.56 a barrel.

Kuwait Market

The market closed today up by + 0.54%, closed at 7,458.47 value traded 65.8 million KD, Premier market value traded reached 42.9 million KD and closed at 8,076.65 up by + 0.56%.

Saudi Market

The Market closed up today by +1.46%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.



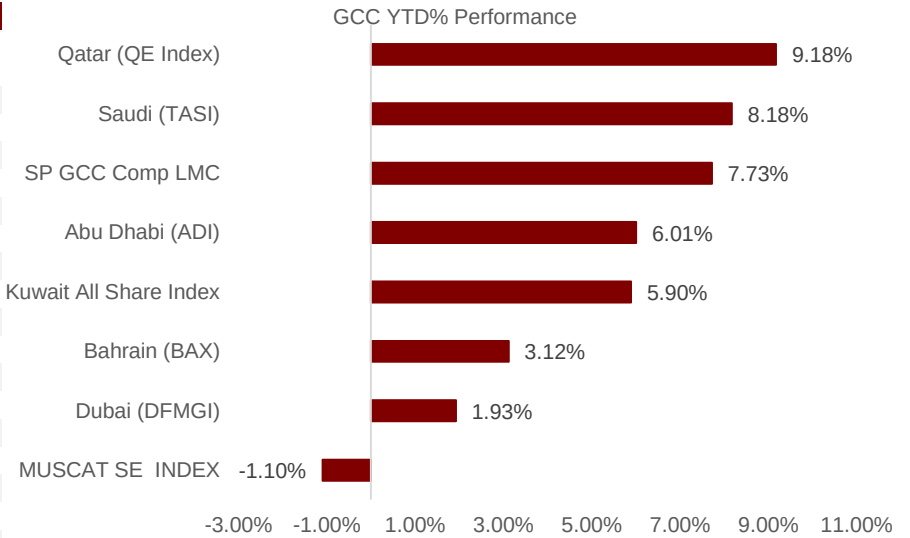
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.032	0.29	-0.19	-0.39	3.51	3.51	7.42 KWD	1.87	27.00
KFH	0.903	0.33	-0.11	-0.33	8.53	8.53	7.62 KWD	3.50	32.00
Zain	0.612	0.99	-0.49	2.17	2.86	2.86	2.65 KWD	2.23	14.12
BOUBYAN BANK	0.816	0.74	0.99	1.24	3.29	3.29	2.59 KWD	3.63	34.00
Agility	1.016	1.30	-0.20	1.20	7.51	7.51	2.27 KWD	1.04	2.14
Saudi Arabia									
ARAMCO	37.30	0.67	0.00	-0.13	4.19	4.19	7,410.00 SAR	6.93	22.57
SABIC	120.60	1.17	-1.15	-3.21	3.97	3.97	357.60 SAR	2.06	35.00
STC	116.20	0.87	-0.34	-1.02	3.38	3.38	230.40 SAR	3.36	20.64
AL-RAJHI BANK	150.00	1.35	0.13	1.21	5.78	5.78	370.00 SAR	5.81	27.03
NCB	71.00	3.05	0.57	-3.79	10.25	10.25	308.53 SAR	1.88	20.41
United Arab Emirates									
ETISALAT.AD	33.10	0.00	0.00	0.00	4.42	4.42	287.86 AED	6.25	31.19
FAB.AD	20.74	0.19	0.19	3.70	10.08	10.08	226.04 AED	2.00	18.55
EMIRATES NBD	13.90	1.09	1.09	4.12	2.58	2.58	86.85 AED	1.04	9.97
DB ISLAMIC BK	5.68	0.00	0.00	3.27	5.58	5.58	41.13 AED	1.06	10.77
EMAAR PROPERT	4.84	-1.22	-1.22	-0.41	-1.02	-1.02	40.08 AED	0.61	12.72
Qatar									
QNB	21.07	-1.54	-2.23	-3.53	4.36	4.36	194.61 QAR	1.97	16.19
INDUSTRIES QAT	18.03	0.45	-1.75	6.83	16.07	16.07	109.08 QAR	2.76	13.43
QA ISLAMIC BK	20.08	0.15	-0.50	2.45	9.55	9.55	47.45 QAR	1.92	14.10
MASRAF AL RAYA	5.00	0.97	-1.57	0.73	6.70	6.70	46.49 QAR	1.90	21.62
MESAIEED PETRO	2.70	1.39	-0.92	10.97	29.28	29.28	33.95 QAR	2.03	20.42
OMAN									
BANK MUSCAT	0.514	-1.15	0.00	0.00	7.44	7.44	1.84 OMR	0.85	8.33
OMANTEL	0.800	2.56	0.00	-1.02	3.72	3.72	0.60 OMR	1.07	7.69
BANK DHOFAR	0.118	-0.84	0.00	-0.84	-6.35	-6.35	0.35 QAR	0.50	14.93
NAT BANK OF OMAN	0.182	0.00	-1.62	-3.70	-7.61	-7.61	0.30 QAR	0.54	12.71
OMINVEST	0.300	0.00	-1.32	-1.32	-1.96	-1.96	0.24 QAR	0.88	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
2-Feb-22	20.96%	12.30%	0.06%	0.46%	0.40%	5.27%	2.52%	10.36%	5.29%	4.26%
9-Feb-22	20.95%	12.32%	0.06%	0.45%	0.41%	5.80%	2.46%	10.37%	5.26%	4.26%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.54 %The leading sector bottom performance indices today are Insurance -0.28 % Consumer Disc -0.17 % Basic materials -0.16 % respectively

Telecommunication sector is up today by +1.82 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 10.35 %

KSA

Saudi Armco has a positive performance today by + 0.67 %, SABIC has a positive performance today by +1.17 %

STC has a positive performance today by + 0.87 %, Al Rajhi Bank has a positive performance today by +1.35 %

UAE

ETISALAT AD closed flat today, and act defensively with COVID19



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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