

شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, February 15, 2022



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



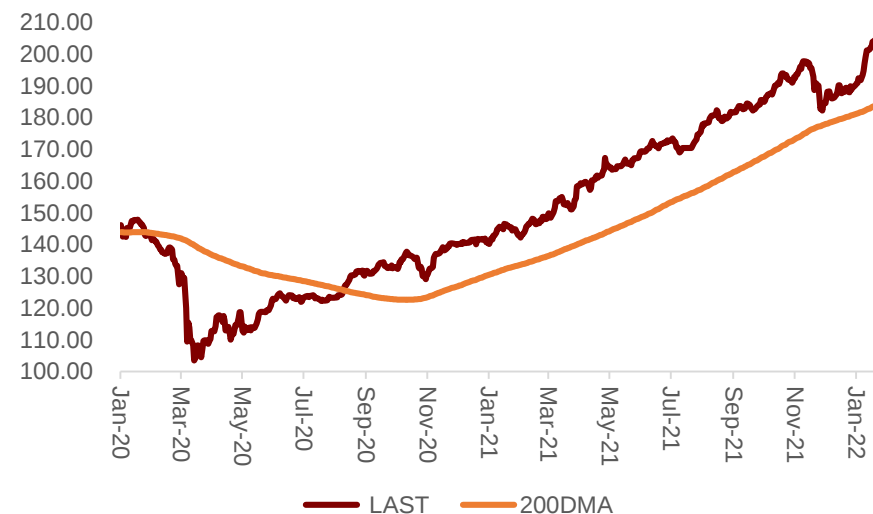
Market Watch

Tuesday, February 15, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
GCC Markets									
Saudi (TASI)	12,350.64	1.20	0.67	0.64	9.47	9.47	10,445 SAR	2.53	19.18
Qatar (QE Index)	12,714.32	0.17	-0.74	1.73	9.36	9.36	641 QAR	1.81	14.56
Dubai (DFMGI)	3,278.86	0.96	0.66	2.37	2.60	2.60	324 AED	1.48	22.65
Abu Dhabi (ADI)	9,135.18	0.32	1.52	4.95	7.62	7.62	1,435 AED	1.85	35.20
Bahrain (BAX)	1,865.538	0.66	-0.10	3.08	3.80	3.80	19 BHD	1.52	10.11
MUSCAT SE INDEX	4,081.981	-0.06	-0.26	-0.83	-1.15	-1.15	5 OMR	0.87	13.25
SP GCC Comp LMC	206.620	1.09	0.92	1.50	8.90	8.90			
Developed Markets									
MSCI World Index	3,011.45	-0.91	-0.91	-1.56	-6.82	-6.82			
U.S. (S&P 500)	4,401.67	0.33	-0.38	-2.52	-7.65	-7.65			
U.K. (FTSE 100)	7,582.63	0.68	-1.02	1.58	2.68	2.68			
Japan (Topix)	1,914.70	-0.83	-2.44	0.99	-3.90	-3.90			
Emerging Markets									
MSCI EM Index	1,240.507	1.65	-0.85	2.67	1.45	1.45			
China (SSE Composite)	3,446.09	0.50	-0.49	2.52	-5.32	-5.32			
India (Sensex)	58,142.05	3.08	0.00	0.24	-0.18	-0.18			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Kuwait									
Kuwait All Share Index	7,488.02	0.40	0.14	1.87	6.32	6.32	44.20 KWD	2.23	26.71
Kuwait Premier Index	8,103.24	0.33	0.26	1.13	6.08	6.08	33.02 KWD	2.35	26.07
Kuwait Main Index	6,299.97	0.61	-0.25	4.16	7.03	7.03	11.18 KWD	1.85	28.69
NIC 50	9,010.80	0.31	0.28	1.11	5.73	5.73	28.60 KWD	2.33	25.07
Kuwait Sector									
Banking	1,715.82	0.28	0.23	0.77	5.73	5.73	25.39 KWD	1.40	27.07
Telecom	1,218.11	1.33	1.61	10.93	11.82	11.82	3.69 KWD	0.91	14.12
Industrials	1,232.08	0.66	0.62	3.85	7.94	7.94	4.35 KWD	1.02	14.47
Financial services	1,533.03	0.34	-0.85	0.96	7.71	7.71	3.89 KWD	0.86	21.94
Real estate	1,338.30	0.28	-1.10	-0.87	0.90	0.90	2.88 KWD	0.73	51.46
Basic materials	1,138.24	0.60	0.04	2.38	11.07	11.07	1.01 KWD	1.85	29.46
Health care	814.75	-0.66	-0.66	0.98	2.22	2.22	0.41 KWD	6.16	13.70
Consumer services	726.75	0.33	-0.52	0.36	-0.60	-0.60	0.76 KWD	0.91	15.70
Insurance	1,603.21	-0.27	0.18	4.91	4.55	4.55	0.67 KWD	0.81	8.68
Consumer Disc	1,488.50	-0.03	-1.20	3.77	11.36	11.36	0.22 KWD	1.30	8.94
Energy	1,395.40	0.67	-1.01	-3.35	-2.29	-2.29	0.29 KWD	1.00	15.00
Technology	720.23	1.12	-3.88	-4.81	5.32	5.32	0.01 KWD	0.84	0.00
Utilities	586.84	0.00	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 fell on Tuesday as investors took profits from the previous day's rally to seven-year highs and as global stock markets slumped, although losses were capped by fears that Russia might invade Ukraine and disrupt supplies, Brent crude futures was at \$96.19 a barrel by 0205 GMT, down 29 cents, or 0.3%, after rising \$2.04 on Monday.

Kuwait Market

The market closed today up by + 0.40%, closed at 7,488.02 value traded 72.3 million KD, Premier market value traded reached 48.8 million KD and closed at 8,103.24 up by + 0.33%.

Saudi Market

The Market closed up today by +1.20%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

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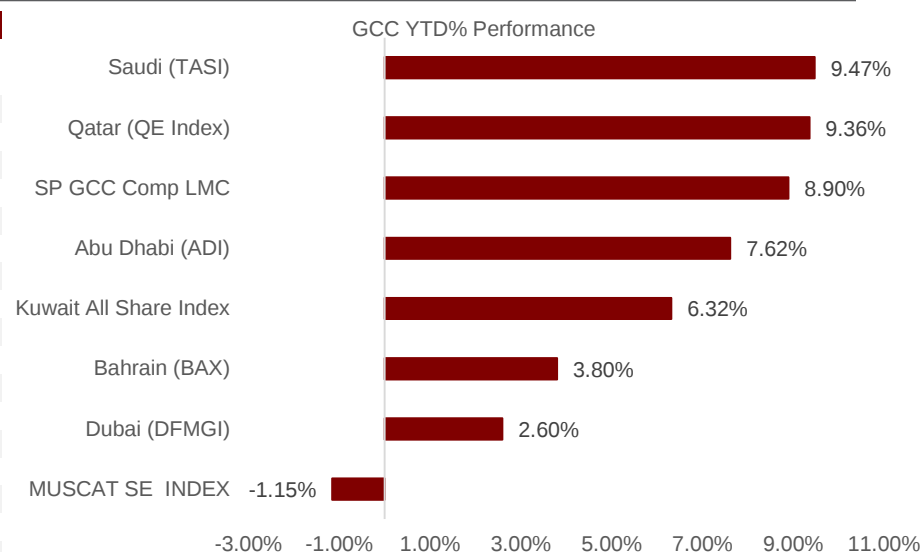
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.033	0.10	-0.19	-0.39	3.51	3.51	7.42 KWD	1.87	27.00
KFH	0.906	0.33	0.22	0.00	8.89	8.89	7.62 KWD	3.50	32.00
Zain	0.612	0.00	-0.49	2.17	2.86	2.86	2.65 KWD	2.23	14.12
BOUBAYAN BANK	0.812	-0.49	0.62	0.87	2.91	2.91	2.59 KWD	3.63	34.00
Agility	1.021	0.49	0.79	2.19	8.57	8.57	2.27 KWD	1.04	2.14
Saudi Arabia									
ARAMCO	37.30	0.00	0.00	-0.13	4.19	4.19	7,410.00 SAR	6.93	22.57
SABIC	121.00	0.33	-0.82	-2.89	4.31	4.31	357.60 SAR	2.06	35.00
STC	115.80	-0.34	-0.69	-1.36	3.02	3.02	230.40 SAR	3.36	20.64
AL-RAJHI BANK	156.00	4.00	4.14	5.26	10.01	10.01	370.00 SAR	5.81	27.03
NCB	72.20	1.69	2.27	-2.17	12.11	12.11	308.53 SAR	1.88	20.41
United Arab Emirates									
ETISALAT.AD	33.00	-0.30	-0.30	-0.30	4.10	4.10	287.86 AED	6.25	31.19
FAB.AD	20.90	0.77	0.97	4.50	10.93	10.93	226.04 AED	2.00	18.55
EMIRATES NBD	13.85	-0.36	0.73	3.75	2.21	2.21	86.85 AED	1.04	9.97
DB ISLAMIC BK	5.79	1.94	1.94	5.27	7.62	7.62	41.13 AED	1.06	10.77
EMAAR PROPERT	4.90	1.24	0.00	0.82	0.20	0.20	40.08 AED	0.61	12.72
Qatar									
QNB	21.00	-0.33	-2.60	-3.89	3.96	3.96	194.61 QAR	1.97	16.19
INDUSTRIES QAT	17.94	-0.50	-1.80	6.77	16.01	16.01	109.08 QAR	2.76	13.43
QA ISLAMIC BK	20.22	0.70	0.10	3.06	10.20	10.20	47.45 QAR	1.92	14.10
MASRAF AL RAYA	4.96	-0.78	-1.31	1.00	6.98	6.98	46.49 QAR	1.90	21.62
MESAIEED PETRO	2.77	2.52	1.39	13.55	32.30	32.30	33.95 QAR	2.03	20.42
OMAN									
BANK MUSCAT	0.516	0.39	-0.77	-0.77	6.61	6.61	1.84 OMR	0.85	8.33
OMANTEL	0.792	-1.00	1.54	0.51	5.32	5.32	0.60 OMR	1.07	7.69
BANK DHOFAR	0.118	0.00	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 + 0.4 %The leading sector best performance indices today are Telecom 1.33 % Technology 1.12 % Energy 0.67 % respectively

Telecommunication sector are up today by + 1.33 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 5.54 %

KSA

Saudi Armco has a flat performance today, SABIC has a positive performance today by + 0.33 %

STC has a negative performance today by - 0.34 %, Al Rajhi Bank has a positive performance today by + 4.0 %

UAE

ETISALAT AD closed down today by - 0.30%, and act defensively with COVID19



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