

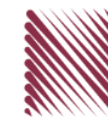


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, May 16, 2022





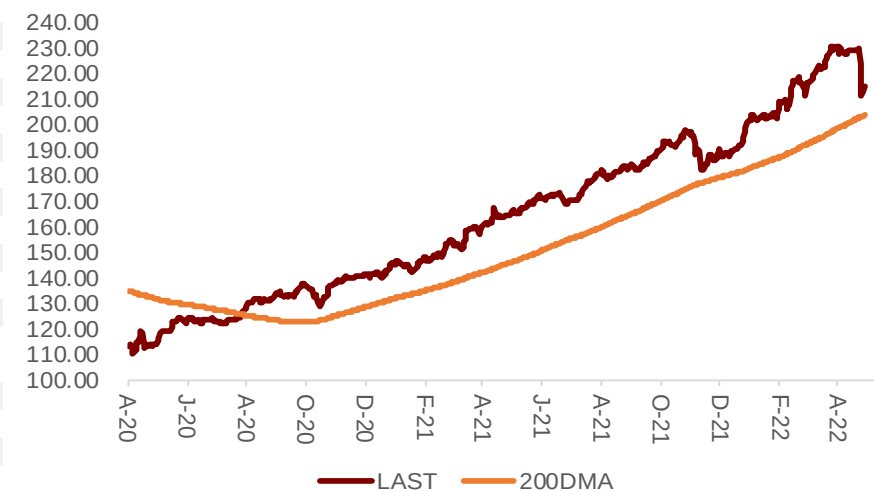
Market Watch

Monday, May 16, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,914.89	-1.78	0.62	-5.96	-1.34	14.48	12,590 SAR	2.28	21.14
Qatar (QE Index)	12,675.92	-1.56	-3.56	-6.73	-6.33	9.03	643 QAR	1.49	15.20
Dubai (DFMGI)	3,418.57	2.77	2.77	-8.09	-3.06	6.97	332 AED	1.69	25.00
Abu Dhabi (ADI)	9,493.42	2.93	2.93	-5.83	-4.58	11.84	1,435 AED	1.97	20.23
Bahrain (BAX)	1,960.90	0.06	0.06	-4.63	-5.43	9.11	20 BHD	1.21	25.00
MUSCAT SE INDEX	4,154.49	0.21	0.21	-0.09	-1.21	0.60	5 OMR	0.94	13.25
SP GCC Comp LMC	211.24	-0.06	-0.06	-7.95	-5.16	11.32			
Developed Markets									
MSCI World Index	2,693.95	2.05	2.05	-3.64	-11.76	-16.64			
U.S. (S&P 500)	4,008.01	1.98	1.98	-3.00	-11.53	-15.91			
U.K. (FTSE 100)	7,464.80	3.20	3.20	-1.06	-0.68	1.09			
Japan (Topix)	1,863.26	1.86	1.86	-1.91	-4.27	-6.48			
Emerging Markets									
MSCI EM Index	1,007.50	1.99	1.99	-6.38	-11.76	-18.22			
China (SSE Composite)	3,073.75	0.61	0.61	0.88	-5.49	-15.55			
India (Sensex)	52,973.84	0.08	0.08	-7.16	-9.55	-9.06			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,700.78	-2.14	-2.14	-7.87	-5.47	9.34	46.09 KWD	2.49	24.10
Kuwait Premier Index	8,525.48	-2.42	-2.42	-8.41	-5.91	11.60	35.26 KWD	2.69	25.66
Kuwait Main Index	6,011.41	-1.11	-1.11	-5.92	-3.89	2.13	10.83 KWD	1.83	19.10
NIC 50	9,524.38	-2.31	-2.43	-8.42	-5.92	11.76	28.60 KWD	2.67	24.66
Kuwait Sector									
Banking	1,821.58	-2.34	-2.34	-6.97	-5.63	12.25	27.36 KWD	1.45	26.66
Telecom	1,240.72	-1.61	-1.61	-12.18	-1.70	13.89	3.81 KWD	0.94	15.36
Industrials	1,242.47	-4.14	-4.14	-12.97	-4.05	8.85	4.41 KWD	0.95	23.48
Financial services	1,516.08	-1.49	-1.49	-8.48	-8.71	6.52	3.94 KWD	0.83	16.87
Real estate	1,268.51	-0.85	-0.85	-7.44	-9.08	-4.37	2.74 KWD	0.69	41.94
Basic materials	1,147.65	-0.82	-0.82	-1.02	-1.21	11.99	1.02 KWD	1.76	11.53
Health care	492.00	0.00	0.00	2.07	-0.61	-38.27	0.24 KWD	2.98	15.56
Consumer services	683.59	-1.24	-1.24	-3.71	-3.96	-6.50	0.77 KWD	0.89	31.38
Insurance	1,560.30	2.31	2.31	1.23	-3.76	1.75	0.65 KWD	0.70	9.33
Consumer Disc	1,507.10	-1.38	-1.38	-6.70	-2.32	12.75	0.21 KWD	1.26	10.20
Energy	1,214.00	-1.01	-1.01	-2.82	-6.53	-14.99	0.25 KWD	0.85	15.72
Technology	658.39	-4.74	-4.74	-1.63	-2.69	-3.72	0.01 KWD	0.79	0.00
Utilities	565.79	0.00	0.00	-3.15	-3.59	-5.70	0.24 KWD	2.70	16.58

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

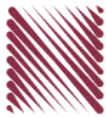
Oil prices rose on Monday on optimism that China would see significant demand recovery after positive signs that coronavirus pandemic was receding in the hardest-hit areas. Brent crude advanced 2.4% to \$114.24, while U.S. West Texas Intermediate (WTI) crude settled 3.4% higher at \$114.20 per barrel.

Kuwait Market

The market closed today down by -2.14%, closed at 7,700.78 value traded 106.69 million KD, Premier market value traded reached 82.79 million KD and closed at 8,525.48 down by -2.42%.

Saudi Market

The Market closed down today by -1.78%, GCC Market closed down as fears grew that fast-rising inflation will drive a sharp rise in interest rates that brings the global economy to a standstill.

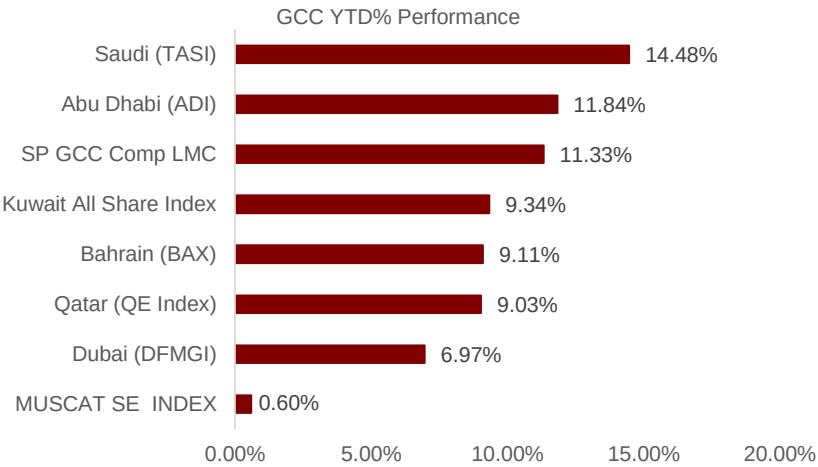


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.994	-3.50	-3.50	-5.51	-9.55	4.68	7.51 KWD	1.96	27.00
KFH	0.900	-2.70	-2.70	-8.63	-7.56	18.99	8.36 KWD	4.38	32.00
Zain	0.602	-0.99	-0.99	-11.60	-4.14	1.18	2.61 KWD	2.30	13.83
BOUBYAN BANK	0.832	-2.69	-2.69	-10.42	-1.74	16.80	3.11 KWD	4.12	34.00
Agility	1.035	-5.57	-5.57	-17.20	-6.33	9.52	2.31 KWD	1.08	2.23
Saudi Arabia									
ARAMCO	42.50	0.35	4.59	4.12	8.47	30.59	9,350.25 SAR	8.39	20.31
SABIC	120.00	-2.44	-0.83	-8.40	-8.40	3.45	360.01 SAR	2.00	35.00
STC	108.60	-2.16	-1.27	-6.38	0.74	-3.38	217.21 SAR	3.08	19.46
AL-RAJHI BANK	100.00	-3.66	-0.20	-9.40	-0.37	12.83	400.01 SAR	5.11	29.67
NCB	71.60	-4.53	-3.24	-9.37	0.99	11.18	320.63 SAR	1.93	22.46
United Arab Emirates									
ETISALAT.AD	31.50	6.28	6.28	-10.00	-14.77	-0.63	273.93 AED	5.60	29.14
FAB.AD	19.50	3.72	3.72	-13.10	-17.37	4.71	215.41 AED	1.94	14.52
EMIRATES NBD	13.65	3.41	3.41	-10.49	-9.00	0.74	86.21 AED	1.06	9.40
DB ISLAMIC BK	5.99	2.39	2.39	-7.13	-2.92	11.34	43.37 AED	1.13	9.79
EMAAR PROPERT	5.66	2.91	2.91	-11.29	-5.67	15.75	46.30 AED	0.75	7.63
Qatar									
QNB	21.50	-2.27	-6.52	-7.53	-6.81	6.49	197.61 QAR	2.05	15.87
INDUSTRIES QAT	17.20	0.47	0.64	-8.56	-9.47	11.04	103.55 QAR	2.88	11.16
QA ISLAMIC BK	23.89	-2.29	-2.49	-2.45	0.21	30.33	56.17 QAR	2.32	16.30
MASRAF AL RAYA	4.67	-4.42	-11.70	-13.34	-9.65	0.67	43.23 QAR	1.40	21.25
MESAIEED PETRO	2.50	0.04	0.08	-3.40	-14.02	19.71	31.28 QAR	1.95	16.32
OMAN									
BANK MUSCAT	0.522	-0.38	-0.38	-0.76	2.35	13.24	1.98 OMR	0.94	8.33
OMANTEL	0.868	0.93	1.40	0.93	-0.91	15.43	0.65 OMR	1.16	7.69
BANK DHOFAR	0.116	0.00	0.00	-1.69	0.87	-7.94	0.35 QAR	0.50	14.93
NAT BANK OF OMAN	0.200	1.01	1.01	0.00	-2.44	1.52	0.32 QAR	0.58	12.71
OMINVEST	0.316	0.00	0.00	0.64	-6.51	3.27	0.21 QAR	0.70	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
20-Apr-22	22.19%	12.97%	0.06%	0.50%	0.39%	6.94%	2.47%	10.90%	5.51%	3.96%
27-Apr-22	22.25%	13.09%	0.06%	0.50%	0.40%	6.92%	2.50%	10.97%	5.52%	3.96%

End of Report
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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is down today by -2.14 %The leading sector bottom performance indices today are Technology -4.74 % Industrials -4.14 % Banking -2.34 % respectively.

Telecommunication sector are down today by -1.61 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 4.55 %

KSA
Saudi Armco has a positive performance today by + 0.35 %, SABIC have negative performance today by -2.44 %.

STC have negative performance today by -2.16 %, Al Rajhi Bank have negative performance today by -3.66 %

UAE
ETISALAT .AD has a positive performance today by + 6.28 %, FAB.AD has a positive performance today by + 3.72 %.



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