

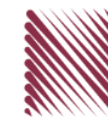


شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Sunday, January 16, 2022

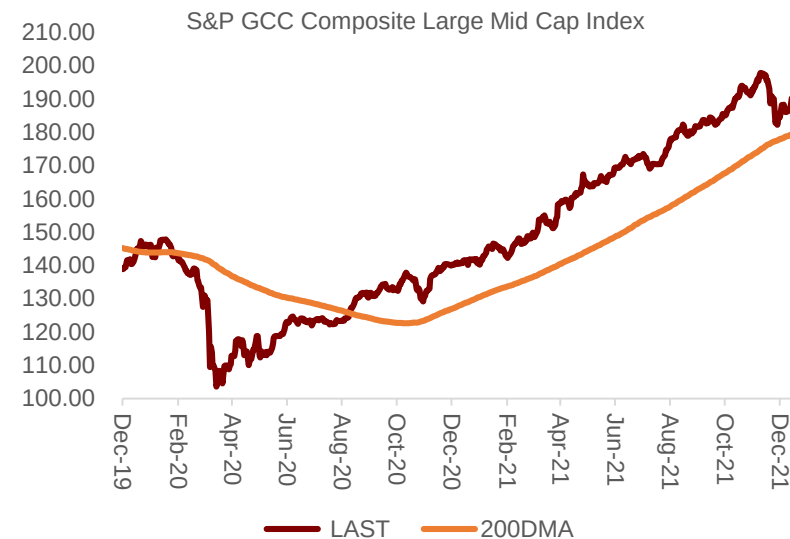




### Market Watch Sunday, January 16, 2022

| Description              | Close      | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|--------------------------|------------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>GCC Markets</b>       |            | %     | %     | %     | %     | %     |               |      |       |
| Saudi (TASI)             | 12,110.150 | 0.26  | 7.34  | 7.34  | 7.34  | 7.34  | 10,289 SAR    | 2.55 | 18.74 |
| Qatar (QE Index)         | 12,433.530 | 0.94  | 6.95  | 6.95  | 6.95  | 6.95  | 614 QAR       | 1.76 | 16.26 |
| Dubai (DFMGI)            | 3,201.770  | -0.40 | 0.18  | 0.18  | 0.18  | 0.18  | 320 AED       | 1.54 | 24.18 |
| Abu Dhabi (ADI)          | 8,425.400  | -0.01 | -0.74 | -0.74 | -0.74 | -1.28 | 1,435 AED     | 1.83 | 16.69 |
| Bahrain (BAX)            | 1,815.801  | 0.63  | 1.89  | 1.03  | 1.03  | 1.03  | 18 BHD        | 1.52 | 9.96  |
| MUSCAT SE INDEX          | 4,240.532  | -0.62 | 2.69  | 2.69  | 2.69  | 2.69  | 5 OMR         | 0.90 | 13.25 |
| SP GCC Comp LMC          | 201.505    | 0.16  | 6.20  | 6.20  | 6.20  | 6.20  |               |      |       |
| <b>Developed Markets</b> |            |       |       |       |       |       |               |      |       |
| MSCI World Index         | 3,173.120  | -0.28 | -1.98 | -1.98 | -1.98 | -1.98 |               |      |       |
| U.S. (S&P 500)           | 4,662.850  | 0.08  | -2.42 | -2.42 | -2.42 | -2.42 |               |      |       |
| U.K. (FTSE 100)          | 7,372.100  | -0.02 | -0.42 | -0.42 | -0.42 | -0.42 |               |      |       |
| Japan (Topix)            | 1,977.660  | 0.00  | -0.74 | -0.74 | -0.74 | -0.74 |               |      |       |
| <b>Emerging Markets</b>  |            |       |       |       |       |       |               |      |       |
| MSCI EM Index            | 1,257.463  | -0.46 | 2.84  | 2.84  | 2.84  | 2.84  |               |      |       |
| China (SSE Composite)    | 3,521.256  | -0.96 | -2.71 | -2.71 | -2.71 | -2.71 |               |      |       |
| India (Sensex)           | 61,223.030 | -0.02 | 5.93  | 5.93  | 5.93  | 5.93  |               |      |       |

| Description            | Close    | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|------------------------|----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>Kuwait</b>          |          | %     | %     | %     | %     | %     |               |      |       |
| Kuwait All Share Index | 7,384.97 | -0.06 | 4.16  | 4.96  | 4.96  | 4.96  | 43.26 KWD     | 2.20 | 27.58 |
| Kuwait Premier Index   | 8,055.47 | -0.03 | 4.69  | 5.57  | 5.57  | 5.57  | 32.40 KWD     | 2.32 | 27.63 |
| Kuwait Main Index      | 6,065.41 | -0.15 | -0.09 | 3.10  | 3.10  | 3.10  | 10.86 KWD     | 1.80 | 27.53 |
| NIC 50                 | 8,975.69 | -0.04 | -0.04 | 5.32  | 5.32  | 5.32  | 28.60 KWD     | 2.30 | 26.63 |
| <b>Kuwait Sector</b>   |          |       |       |       |       |       |               |      |       |
| Banking                | 1,718.72 | -0.06 | -0.06 | 5.91  | 5.91  | 5.91  | 25.10 KWD     | 1.41 | 28.63 |
| Telecom                | 1,098.50 | -0.75 | -0.75 | 0.84  | 0.84  | 0.84  | 3.38 KWD      | 0.90 | 15.21 |
| Industrials            | 1,177.99 | -0.17 | -0.17 | 3.20  | 3.20  | 3.20  | 4.14 KWD      | 0.88 | 14.04 |
| Financial services     | 1,506.97 | 0.46  | 0.46  | 5.88  | 5.88  | 5.88  | 3.86 KWD      | 0.88 | 13.80 |
| Real estate            | 1,371.36 | 0.31  | 0.31  | 3.39  | 3.39  | 3.39  | 2.94 KWD      | 0.74 | 49.87 |
| Basic materials        | 1,086.65 | 0.91  | 0.91  | 6.04  | 6.04  | 6.04  | 0.93 KWD      | 1.89 | 27.68 |
| Health care            | 797.27   | 0.00  | 0.00  | 0.03  | 0.03  | 0.03  | 0.39 KWD      | 6.16 | 11.94 |
| Consumer services      | 732.42   | 0.24  | 0.24  | 0.18  | 0.18  | 0.18  | 0.77 KWD      | 0.94 | 15.85 |
| Insurance              | 1,481.44 | -0.96 | -0.96 | -3.39 | -3.39 | -3.39 | 0.63 KWD      | 0.83 | 8.43  |
| Consumer Disc          | 1,476.34 | -1.43 | -1.43 | 10.45 | 10.45 | 10.45 | 0.23 KWD      | 1.35 | 8.99  |
| Energy                 | 1,443.30 | 0.34  | 0.34  | 1.06  | 1.06  | 1.06  | 0.30 KWD      | 1.03 | 14.96 |
| Technology             | 705.68   | -1.92 | -1.92 | 3.19  | 3.19  | 3.19  | 0.01 KWD      | 0.85 | 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 futures settled higher on Friday, boosted by supply constraints and worries of a Russian attack on neighboring Ukraine, pushing prices toward their fourth weekly gain despite sources saying China is set to release crude reserves around the Lunar New Year, Brent crude futures settled \$1.59, or 1.9%, higher at a 2-1/2-month high of \$86.06 a barrel, gaining 5.4% in the week.

#### Kuwait Market

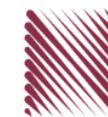
The market closed today down by - 0.06%, closed at 7,384.97 value traded 84.3 million KD, Premier market value traded reached 57.3 million KD and closed at 8,055.47 down by - 0.03%.

#### Saudi Market

The Market closed up today by + 0.26%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



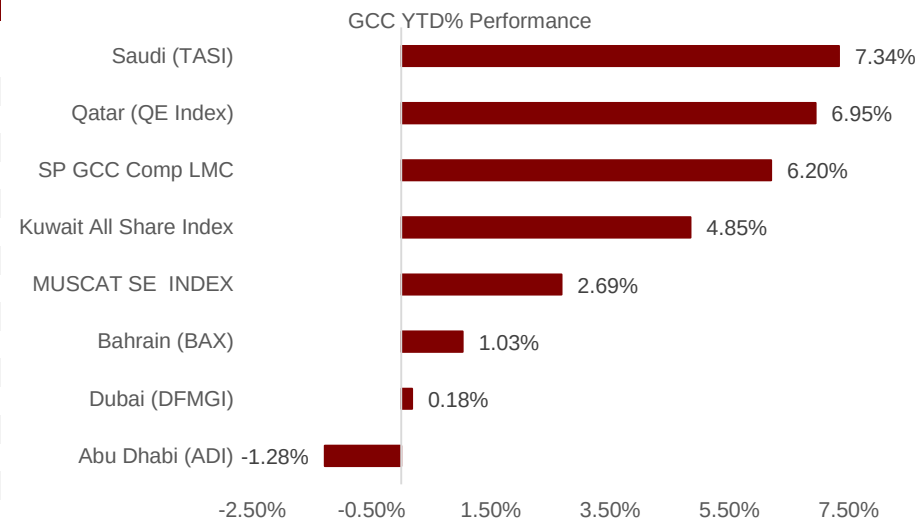
| Description                 | Close  | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|-----------------------------|--------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>Blue Chip Watch</b>      |        |       |       |       |       |       |               |      |       |
| <b>Kuwait</b>               |        |       |       |       |       |       |               |      |       |
| NBK                         | 1.042  | -0.95 | -0.95 | 4.51  | 4.51  | 4.51  | 7.44 KWD      | 1.92 | 27.00 |
| KFH                         | 0.905  | 0.67  | 8.25  | 8.77  | 8.77  | 8.77  | 7.37 KWD      | 3.39 | 32.00 |
| Zain                        | 0.598  | -0.83 | -0.83 | 0.50  | 0.50  | 0.50  | 2.59 KWD      | 2.18 | 13.74 |
| BOUBYAN BANK                | 0.831  | -0.12 | 2.09  | 5.06  | 5.06  | 5.06  | 2.64 KWD      | 3.76 | 34.00 |
| Agility                     | 1.009  | 0.10  | 6.11  | 6.67  | 6.67  | 6.67  | 2.20 KWD      | 1.01 | 2.11  |
| <b>Saudi Arabia</b>         |        |       |       |       |       |       |               |      |       |
| ARAMCO                      | 36.75  | 0.14  | 2.65  | 2.65  | 2.65  | 2.65  | 7,269.23 SAR  | 6.80 | 21.78 |
| SABIC                       | 123.40 | 1.15  | 6.38  | 6.38  | 6.38  | 6.38  | 362.96 SAR    | 2.09 | 35.00 |
| STC                         | 114.00 | 1.24  | 1.42  | 1.42  | 1.42  | 1.42  | 223.58 SAR    | 3.26 | 19.72 |
| AL-RAJHI BANK               | 150.20 | -0.53 | 5.92  | 5.92  | 5.92  | 5.92  | 376.46 SAR    | 5.92 | 27.03 |
| NCB                         | 72.00  | -1.37 | 11.80 | 11.80 | 11.80 | 11.80 | 321.93 SAR    | 2.00 | 20.59 |
| <b>United Arab Emirates</b> |        |       |       |       |       |       |               |      |       |
| ETISALAT.AD                 | 29.96  | 0.13  | -2.60 | -5.49 | -5.49 | -5.49 | 260.90 AED    | 5.66 | 28.27 |
| FAB.AD                      | 19.34  | 0.00  | 4.32  | 2.65  | 2.65  | 2.65  | 207.48 AED    | 1.90 | 17.07 |
| EMIRATES NBD                | 13.15  | -1.13 | -1.87 | -2.95 | -2.95 | -2.95 | 83.06 AED     | 0.97 | 10.41 |
| DB ISLAMIC BK               | 5.50   | 0.18  | 0.18  | 2.23  | 2.23  | 2.23  | 39.82 AED     | 1.04 | 14.67 |
| EMAAR PROPERT               | 4.96   | -0.80 | -0.20 | 1.43  | 1.43  | 1.43  | 40.74 AED     | 0.62 | 12.92 |
| <b>Qatar</b>                |        |       |       |       |       |       |               |      |       |
| QNB                         | 21.30  | 1.43  | 6.65  | 6.49  | 6.49  | 6.49  | 191.38 QAR    | 1.93 | 15.67 |
| INDUSTRIES QAT              | 16.40  | 1.61  | 1.81  | 5.55  | 5.55  | 5.55  | 96.80 QAR     | 2.59 | 14.53 |
| QA ISLAMIC BK               | 20.25  | 1.15  | 6.69  | 10.53 | 10.53 | 10.53 | 46.08 QAR     | 1.93 | 14.54 |
| MASRAF AL RAYA              | 5.06   | 1.16  | 1.07  | 8.38  | 8.38  | 8.38  | 46.49 QAR     | 2.53 | 16.84 |
| MESAIEED PETRO              | 2.45   | -1.13 | 8.84  | 17.22 | 17.22 | 17.22 | 30.15 QAR     | 1.81 | 18.39 |
| <b>OMAN</b>                 |        |       |       |       |       |       |               |      |       |
| BANK MUSCAT                 | 0.520  | -0.38 | 0.39  | 7.44  | 7.44  | 7.44  | 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                 | 0.128  | -6.57 | -7.25 | 1.59  | 1.59  | 1.59  | 0.40 QAR      | 0.57 | 14.93 |
| NAT BANK OF OMAN            | 0.213  | 1.43  | 8.12  | 8.12  | 8.12  | 8.12  | 0.33 QAR      | 0.59 | 12.71 |
| OMINVEST                    | 0.306  | 0.00  | -1.29 | 0.00  | 0.00  | 0.00  | 0.25 QAR      | 0.91 | 6.85  |

| Foreign Holding |        |        |       |       |         |       |       |        |       |       |
|-----------------|--------|--------|-------|-------|---------|-------|-------|--------|-------|-------|
| Date            | NBK    | GBK    | CBK   | ABK   | MUTAHED | KIB   | BURG  | KFH    | BOUB  | WARBA |
| 5-Jan-22        | 20.86% | 12.53% | 0.06% | 0.38% | 0.40%   | 4.83% | 2.66% | 10.35% | 5.24% | 4.44% |
| 12-Jan-22       | 20.89% | 12.62% | 0.06% | 0.38% | 0.40%   | 4.92% | 2.62% | 10.35% | 5.23% | 4.36% |

### End of Report

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### Leading Sector, Security Performance

#### Kuwait

The market is down today by -0.06 %The leading sector bottom performance indices today are Technology -1.92 % Consumer Disc -1.43 % Insurance -0.96 % respectively

Telecommunication sector are down today by -0.75 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-4.12 %

#### KSA

Saudi Armco has a positive performance today by + 0.14 %, SABIC have positive performance today by + 1.15 %

STC has a positive performance today by + 1.24 %, Al Rajhi Bank has a negative performance today by -0.53 %

#### UAE

ETISALAT AD closed up today by +0.13 %, and act defensively with COVID19



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