



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, February 17, 2022



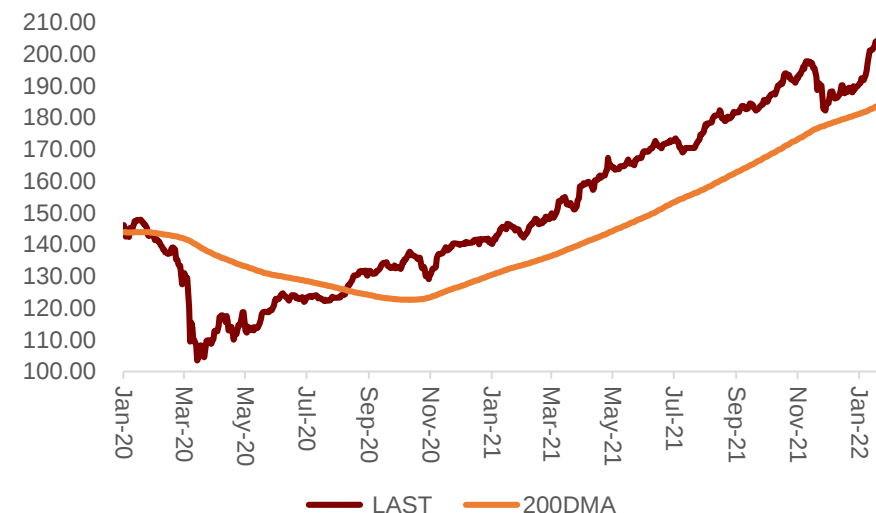


Market Watch

Thursday, February 17, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,476.54	-0.15	1.69	1.67	10.59	10.59	10,574 SAR	2.54	18.74
Qatar (QE Index)	12,735.35	-0.08	-0.57	1.90	9.54	9.54	643 QAR	1.75	15.21
Dubai (DFMGI)	3,330.05	0.13	2.23	3.96	4.20	4.20	325 AED	1.46	22.42
Abu Dhabi (ADI)	9,207.52	0.06	2.32	5.78	8.47	8.47	1,435 AED	1.81	32.23
Bahrain (BAX)	1,925.59	1.40	3.12	6.40	7.14	7.14	19 BHD	1.50	10.29
MUSCAT SE INDEX	4,092.499	0.04	0.00	-0.57	-0.90	-0.90	5 OMR	0.87	13.25
SP GCC Comp LMC	208.817	-0.14	2.00	2.58	10.06	10.06			
Developed Markets									
MSCI World Index	3,009.09	-0.99	-0.99	-1.63	-7.04	-7.04			
U.S. (S&P 500)	4,380.26	-0.87	-0.87	-3.00	-8.34	-8.34			
U.K. (FTSE 100)	7,537.37	-1.61	-1.61	0.98	1.81	1.81			
Japan (Topix)	1,931.24	-0.79	-1.60	1.86	-3.07	1.86			
Emerging Markets									
MSCI EM Index	1,240.507	-0.30	-0.85	2.67	1.45	1.45			
China (SSE Composite)	3,462.948	-0.08	-0.66	3.17	-4.32	-4.32			
India (Sensex)	58,152.92	0.27	-1.31	0.24	0.62	0.62			
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,629.09	0.79	2.02	3.79	8.32	8.32	44.87 KWD	2.28	26.92
Kuwait Premier Index	8,273.03	0.93	2.36	3.25	8.30	8.30	33.50 KWD	2.37	26.56
Kuwait Main Index	6,376.84	0.38	0.97	5.43	8.33	8.33	11.37 KWD	2.01	28.07
NIC 50	9,183.83	0.84	2.21	3.05	7.76	7.76	28.60 KWD	2.35	25.56
Kuwait Sector									
Banking	1,748.53	1.07	2.14	2.69	7.75	7.75	25.71 KWD	1.33	27.56
Telecom	1,253.92	0.07	4.60	14.19	15.11	15.11	3.84 KWD	0.89	15.59
Industrials	1,256.72	0.68	2.63	5.93	10.09	10.09	4.43 KWD	1.00	14.52
Financial services	1,554.97	0.60	0.56	2.40	9.25	9.25	3.95 KWD	0.87	23.47
Real estate	1,348.39	0.40	-0.36	-0.12	1.66	1.66	2.90 KWD	0.72	52.75
Basic materials	1,143.72	0.34	0.52	2.87	11.61	11.61	1.02 KWD	1.86	29.60
Health care	814.75	0.00	-0.66	0.98	2.22	2.22	0.40 KWD	6.16	13.29
Consumer services	713.09	-1.23	-2.39	-1.52	-2.46	-2.46	0.82 KWD	0.94	15.77
Insurance	1,646.70	2.07	2.90	7.76	7.39	7.39	0.67 KWD	0.81	8.68
Consumer Disc	1,590.91	-0.08	5.60	10.91	19.02	19.02	0.22 KWD	1.30	9.02
Energy	1,390.03	-0.60	-1.39	-3.72	-2.67	-2.67	0.29 KWD	1.01	15.19
Technology	691.85	0.00	-7.67	-8.56	1.17	1.17	0.01 KWD	0.82	0.00
Utilities	586.84	0.00	0.00	-0.45	-2.19	-2.19	0.25 KWD	3.95	18.95

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil recovered some of its more than 2% fall in Asian trade on Thursday after Russian-backed rebels in eastern Ukraine accused Kyiv government forces on Thursday of shelling their territory with mortars. U.S. West Texas Intermediate (WTI) crude was trading down 0.7% at \$92.98 a barrel.

Kuwait Market

The market closed today up by + 0.79%, closed at 7,629.09 value traded 83.6 million KD, Premier market value traded reached 60.0 million KD and closed at 8,273.03 up by + 0.93%.

Saudi Market

The Market closed down today by - 0.15%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



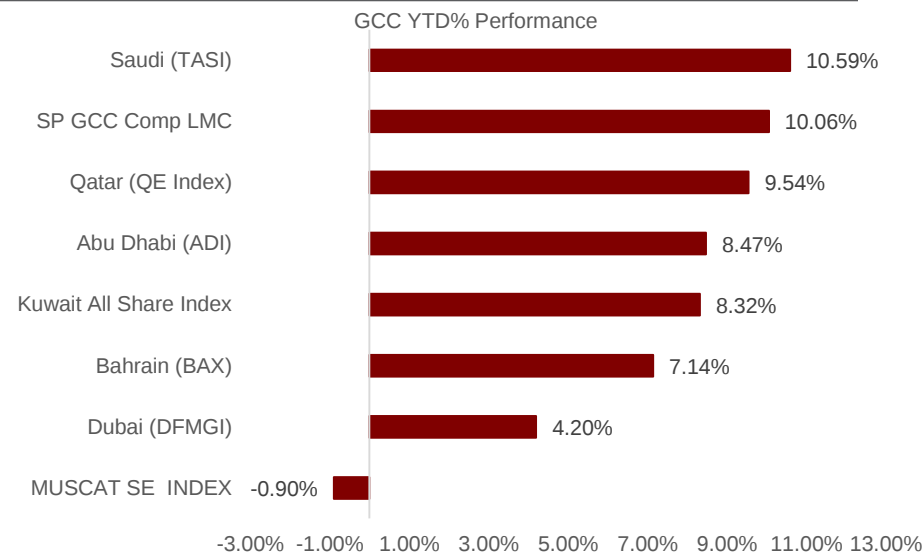
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.058	0.95	2.03	1.83	5.82	5.82	7.54 KWD	1.89	27.00
KFH	0.933	2.08	3.21	2.98	12.14	12.14	7.72 KWD	3.54	32.00
Zain	0.630	0.32	2.28	5.01	5.71	5.71	2.72 KWD	2.28	14.26
BOUBYAN BANK	0.820	0.86	1.49	1.74	3.80	3.80	2.59 KWD	3.62	34.00
Agility	1.035	0.68	1.67	3.09	9.52	9.52	2.29 KWD	1.05	2.17
Saudi Arabia									
ARAMCO	37.75	0.00	1.21	1.07	5.45	5.45	7,460.80 SAR	6.98	22.57
SABIC	121.20	-0.98	-0.66	-2.73	4.48	4.48	363.04 SAR	2.09	35.00
STC	116.60	-1.69	0.00	-0.68	3.74	3.74	231.62 SAR	3.38	20.57
AL-RAJHI BANK	158.60	-0.50	5.87	7.02	11.85	11.85	390.04 SAR	6.13	25.41
NCB	72.80	-0.27	3.12	-1.36	13.04	13.04	323.35 SAR	1.97	20.52
United Arab Emirates									
ETISALAT.AD	33.48	0.97	1.15	1.15	5.62	5.62	286.99 AED	6.23	30.96
FAB.AD	20.92	-0.85	1.06	4.60	11.04	11.04	228.23 AED	2.02	18.73
EMIRATES NBD	14.00	0.00	1.82	4.87	3.32	3.32	87.48 AED	1.05	10.04
DB ISLAMIC BK	5.89	-0.17	3.70	7.09	9.48	9.48	41.92 AED	1.08	10.98
EMAAR PROPERT	5.10	0.99	4.08	4.94	4.29	4.29	40.08 AED	0.61	9.42
Qatar									
QNB	20.85	-0.67	-3.25	-4.53	3.27	3.27	193.87 QAR	1.96	15.88
INDUSTRIES QAT	17.96	0.00	-2.24	6.30	15.49	15.49	108.66 QAR	2.75	13.42
QA ISLAMIC BK	20.49	1.29	0.59	3.57	10.75	10.75	47.80 QAR	1.93	14.22
MASRAF AL RAYA	4.96	-0.10	-1.55	0.75	6.72	6.72	46.13 QAR	1.88	21.66
MESAIEED PETRO	2.76	-1.15	0.84	12.94	31.58	31.58	35.01 QAR	2.10	21.23
OMAN									
BANK MUSCAT	0.520	0.78	0.00	0.00	7.44	7.44	1.84 OMR	0.86	8.33
OMANTEL	0.796	-0.50	2.05	1.02	5.85	5.85	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	0.190	2.15	2.70	0.53	-3.55	-3.55	0.30 QAR	0.54	12.71
OMINVEST	0.298	0.00	-1.97	-1.97	-2.61	-2.61	0.24 QAR	0.88	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
9-Feb-22	20.95%	12.32%	0.06%	0.45%	0.41%	5.80%	2.46%	10.37%	5.26%	4.26%
16-Feb-22	20.95%	12.38%	0.06%	0.46%	0.40%	5.76%	2.48%	10.34%	5.25%	4.28%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.79 %The leading sector best performance indices today are Insurance 2.07 % Banking 1.07 % Industrials 0.68 % respectively

Telecommunication sector are up today by + 0.07 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 6.79 %

KSA

Saudi Armco has a flat performance today, SABIC has a negative performance today by -0.98 %

STC has a negative performance today by -1.69 %, Al Rajhi Bank has a negative performance today by -0.50 %

UAE

ETISALAT AD closed up today by + 0.97%, and act defensively with COVID19



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