

شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, January 17, 2022



DAILY MARKETS WRAP,

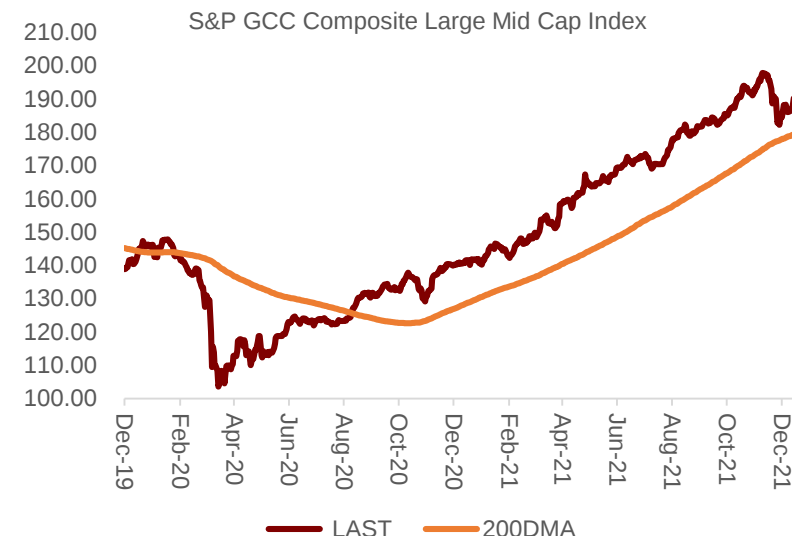
NIC RESEARCH AND STUDIES DEP



Market Watch

Monday, January 17, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,165.840	0.46	0.72	7.84	7.84	7.84	10,289 SAR	2.55	18.74
Qatar (QE Index)	12,471.400	0.30	1.24	7.27	7.27	7.27	614 QAR	1.76	16.26
Dubai (DFMGI)	3,179.350	-0.70	-1.10	-0.52	-0.52	-0.52	320 AED	1.54	24.18
Abu Dhabi (ADI)	8,413.220	-0.14	-0.16	-0.89	-0.89	-1.28	1,435 AED	1.83	16.69
Bahrain (BAX)	1,815.19	-0.03	1.85	1.00	1.00	1.00	18 BHD	1.52	9.96
MUSCAT SE INDEX	4,216.88	-0.56	-1.17	2.11	2.11	2.11	5 OMR	0.90	13.25
SP GCC Comp LMC	202.118	0.30	0.46	6.53	6.53	6.53			
Developed Markets									
MSCI World Index	0.10%	-1.88	-0.18	-1.88	-1.88	-1.81			
U.S. (S&P 500)	0.00%	-2.42	0.08	-2.42	-2.42	-2.17			
U.K. (FTSE 100)	0.91%	2.81	0.63	2.81	2.81	2.81			
Japan (Topix)	0.46%	-0.28	-0.94	-0.28	10.09	-0.28			
Emerging Markets									
MSCI EM Index	1,254.399	-0.24	-0.70	2.59	2.59	2.59			
China (SSE Composite)	3,541.666	0.58	-0.38	-2.14	-2.14	-2.14			
India (Sensex)	61,308.910	0.14	0.12	6.08	6.08	6.08			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,415.22	0.41	0.35	5.28	5.28	5.28	43.26 KWD	2.20	27.58
Kuwait Premier Index	8,092.64	0.46	0.43	5.72	5.72	5.72	32.40 KWD	2.32	27.63
Kuwait Main Index	6,080.50	0.25	0.10	3.30	3.30	3.30	10.86 KWD	1.80	27.53
NIC 50	9,009.71	0.38	0.34	5.72	5.72	5.72	28.60 KWD	2.30	26.63
Kuwait Sector									
Banking	1,727.050	0.48	0.42	6.43	6.43	6.43	25.10 KWD	1.41	28.63
Telecom	1,100.590	0.19	-0.56	1.03	1.03	1.03	3.38 KWD	0.90	15.21
Industrials	1,176.120	-0.16	-0.33	3.03	3.03	3.03	4.14 KWD	0.88	14.04
Financial services	1,513.040	0.40	0.87	6.30	6.30	6.30	3.86 KWD	0.88	13.80
Real estate	1,371.010	-0.03	0.29	3.36	3.36	3.36	2.94 KWD	0.74	49.87
Basic materials	1,112.770	2.40	3.33	8.59	8.59	8.59	0.93 KWD	1.89	27.68
Health care	811.490	0.00	1.78	1.81	1.81	1.81	0.39 KWD	6.16	11.94
Consumer services	740.010	1.04	1.27	1.22	1.22	1.22	0.77 KWD	0.94	15.85
Insurance	1,515.610	2.31	1.32	-1.16	-1.16	-1.16	0.63 KWD	0.83	8.43
Consumer Disc	1,466.200	-0.69	-2.11	9.69	9.69	9.69	0.23 KWD	1.35	8.99
Energy	1,440.570	-0.19	0.15	0.87	0.87	0.87	0.30 KWD	1.03	14.96
Technology	698.400	-1.03	2.13	2.13	2.13	2.13	0.01 KWD	0.85	0.00
Utilities	597.370	-0.44	-0.44	-0.44	-0.44	-0.44	0.25 KWD	4.04	19.37



What Move the GCC markets

Oil Prices

Oil prices edged up on Monday as investors bet supply will remain tight amid restrained output by major producers with global demand unperturbed by the omicron coronavirus variant, Brent crude futures gained 9 cents, or 0.1%, to \$86.15 a barrel.

Kuwait Market

The market closed today up by + 0.41%, closed at 7,415.222 value traded 58.9 million KD, Premier market value traded reached 38.7 million KD and closed at 8,092.64 up by + 0.46%.

Saudi Market

The Market closed up today by + 0.46%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

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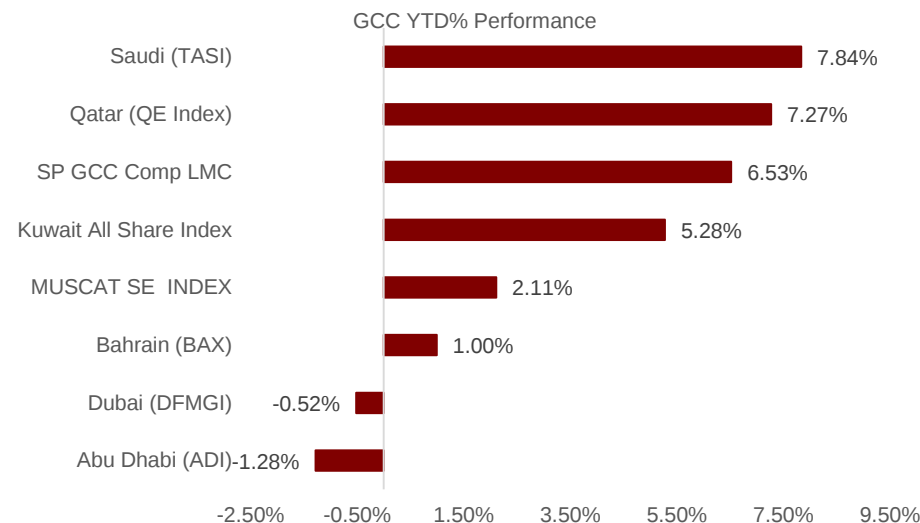
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.048	0.58	-0.38	5.12	5.12	5.12	7.44 KWD	1.92	27.00
KFH	0.914	0.99	1.67	9.50	9.50	9.50	7.37 KWD	3.39	32.00
Zain	0.599	0.17	-0.66	0.67	0.67	0.67	2.59 KWD	2.18	13.74
BOUBYAN BANK	0.837	0.72	0.60	5.70	5.70	5.70	2.64 KWD	3.76	34.00
Agility	1.006	-0.30	-0.20	6.35	6.35	6.35	2.20 KWD	1.01	2.11
Saudi Arabia									
ARAMCO	36.90	0.41	0.54	3.07	3.07	3.07	7,269.23 SAR	6.80	21.78
SABIC	123.80	0.32	1.48	6.72	6.72	6.72	362.96 SAR	2.09	35.00
STC	116.00	1.75	3.02	3.20	3.20	3.20	223.58 SAR	3.26	19.72
AL-RAJHI BANK	150.00	-0.13	-0.66	5.78	5.78	5.78	376.46 SAR	5.92	27.03
NCB	73.00	1.39	0.00	13.35	13.35	13.35	321.93 SAR	2.00	20.59
United Arab Emirates									
ETISALAT.AD	29.860	-0.33	-0.20	-5.80	-5.80	-5.80	260.90 AED	5.66	28.27
FAB.AD	19.500	0.83	0.83	3.50	3.50	3.50	207.48 AED	1.90	17.07
EMIRATES NBD	12.850	-2.28	-3.38	-5.17	-5.17	-5.17	83.06 AED	0.97	10.41
DB ISLAMIC BK	5.440	-1.09	-0.91	1.12	1.12	1.12	39.82 AED	1.04	14.67
EMAAR PROPERT	4.930	-0.60	-1.40	0.82	0.82	0.82	40.74 AED	0.62	12.92
Qatar									
QNB	21.80	2.35	3.81	7.48	7.48	7.48	191.38 QAR	1.93	15.67
INDUSTRIES QAT	16.65	1.52	3.16	7.42	7.42	7.42	96.80 QAR	2.59	14.53
QA ISLAMIC BK	20.00	-1.23	-0.10	9.11	9.11	9.11	46.08 QAR	1.93	14.54
MASRAF AL RAYA	5.05	-0.18	0.98	8.47	8.47	8.47	46.49 QAR	2.53	16.84
MESAIEED PETRO	2.45	0.12	-1.01	17.42	17.42	17.42	30.15 QAR	1.81	18.39
OMAN									
BANK MUSCAT	0.516	-1.15	-1.15	6.61	6.61	6.61	1.85 OMR	0.88	8.33
OMANTEL	0.772	0.52	0.52	2.66	2.66	2.66	0.58 OMR	1.02	7.69
BANK DHOFAR	0.127	-1.55	-7.30	0.79	0.79	0.79	0.40 QAR	0.57	14.93
NAT BANK OF OMAN	0.206	-3.74	1.90	8.63	8.63	8.63	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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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.41 % The leading sector best performance indices today are Basic materials 2.4 % Insurance 2.31 % Health care 1.78 % respectively

Telecommunication sector are up today by + 0.19 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -4.25 %

KSA

Saudi Armco has a positive performance today + 0.41 %, SABIC has a positive performance today by + 0.32 %

STC has a positive performance today by + 1.75 %, Al Rajhi Bank has a negative performance today by - 0.13 %

UAE

ETISALAT AD closed down today by - 0.33 %, and act defensively with COVID19



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