



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

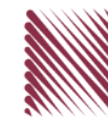
GCC DAILY MORNING BRIEF

Sunday, June 19, 2022



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

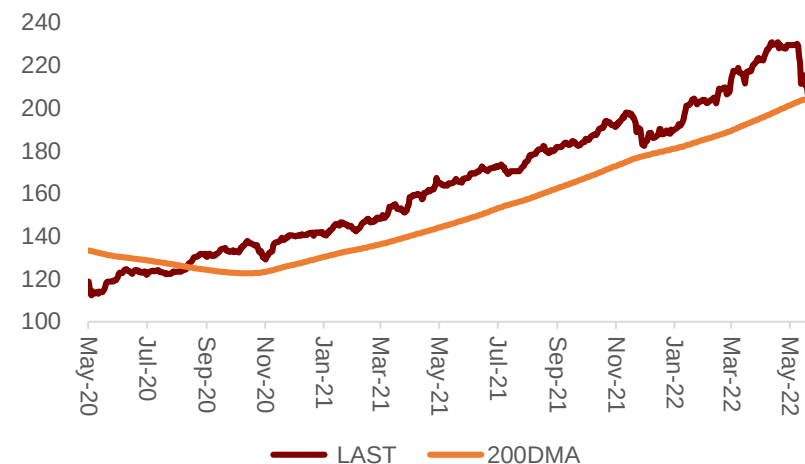


Market Watch Sunday, June 19, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,299.18	-4.44	-4.44	-12.56	-13.68	0.15	10,988 SAR	1.91	18.99
Qatar (QE Index)	12,119.85	-3.52	-3.52	-6.19	-10.44	4.25	609 QAR	1.52	14.37
Dubai (DFMGI)	3,262.08	-0.56	-0.56	-2.54	-7.50	2.07	447 AED	1.38	34.69
Abu Dhabi (ADI)	9,456.62	-0.51	-0.51	-5.95	-4.95	11.41	1,435 AED	2.01	20.34
Bahrain (BAX)	1,832.15	-1.05	-1.05	-4.61	-11.64	1.94	18 BHD	1.18	171.38
MUSCAT SE INDEX	4,120.55	-0.05	-0.05	0.11	-2.01	-0.22	5 OMR	0.92	13.25
SP GCC Comp LMC	190.58	-3.45	-3.60	-10.54	-14.44	0.43			
Developed Markets									
MSCI World Index	2,485.77	-0.19	-0.19	-10.94	-18.58	-23.08			
U.S. (S&P 500)	3,674.84	0.22	0.22	-11.07	-18.89	-22.90			
U.K. (FTSE 100)	7,016.25	-0.41	-0.41	-7.77	-6.65	-4.99			
Japan (Topix)	1,835.90	-1.71	-1.71	-4.01	-5.68	-7.85			
Emerging Markets									
MSCI EM Index	1,004.63	-0.35	-0.35	-6.78	-12.01	-18.46			
China (SSE Composite)	3,316.79	0.96	0.96	4.09	1.99	-8.87			
India (Sensex)	51,360.42	-0.26	-0.26	-7.57	-12.31	-11.83			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,177.92	-3.18	-3.18	-8.25	-11.89	1.91	42.96 KWD	2.32	21.15
Kuwait Permier Index	7,944.40	-3.33	-3.33	-8.43	-12.33	4.00	32.83 KWD	2.47	23.05
Kuwait Main Index	5,608.88	-2.66	-2.66	-7.62	-10.33	-4.71	10.12 KWD	1.84	15.00
NIC 50	8,898.41	-3.47	-3.34	-8.44	-12.34	4.41	28.60 KWD	2.45	22.05
Kuwait Sector									
Banking	1,699.13	-2.73	-2.73	-6.96	-11.97	4.71	25.48 KWD	1.30	24.05
Telecom	1,222.00	-1.87	-1.87	-5.58	-3.18	12.17	3.75 KWD	0.85	13.90
Industrials	1,183.17	-4.77	-4.77	-10.52	-8.63	3.65	4.22 KWD	0.96	10.60
Financial services	1,315.82	-5.57	-5.57	-14.53	-20.77	-7.55	3.45 KWD	0.71	17.26
Real estate	1,180.86	-4.32	-4.32	-10.55	-15.37	-10.97	2.55 KWD	0.64	22.36
Basic materials	1,000.93	-3.88	-3.88	-17.02	-13.84	-2.33	0.89 KWD	1.48	9.54
Health care	480.10	0.00	0.00	0.00	-3.02	-39.76	0.24 KWD	2.87	13.80
Consumer services	544.19	-3.05	-3.05	-16.53	-23.54	-25.57	0.75 KWD	0.88	31.66
Insurance	1,515.97	-0.95	-0.95	0.86	-6.49	-1.14	0.63 KWD	0.74	8.20
Consumer Disc	1,459.70	-2.91	-2.91	-7.89	-5.40	9.21	0.17 KWD	1.01	10.60
Energy	1,143.28	0.51	0.51	-2.01	-11.97	-19.95	0.24 KWD	0.80	15.68
Technology	654.75	0.00	0.00	-2.17	-3.23	-4.26	0.01 KWD	0.78	0.00
Utilities	528.95	-2.90	-2.90	-6.51	-9.86	-11.84	0.22 KWD	2.53	15.50

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil wobbles as global economic worries offset tightening supply. Brent crude futures slipped 8 cents, or 0.1%, to \$113.04 a barrel by 0242 GMT, after rising as much as 1% earlier. Front-month prices tumbled 7.3% last week, its first weekly fall in five.

Kuwait Market

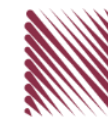
The market closed down today by -3.18%, closed at 7,177.92 value traded 56.4 million KD, Premier market value traded reached 41.9 million KD and closed at 7,944.4 down by -3.33%.

Saudi Market

The Market closed down today by -4.44%, 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.

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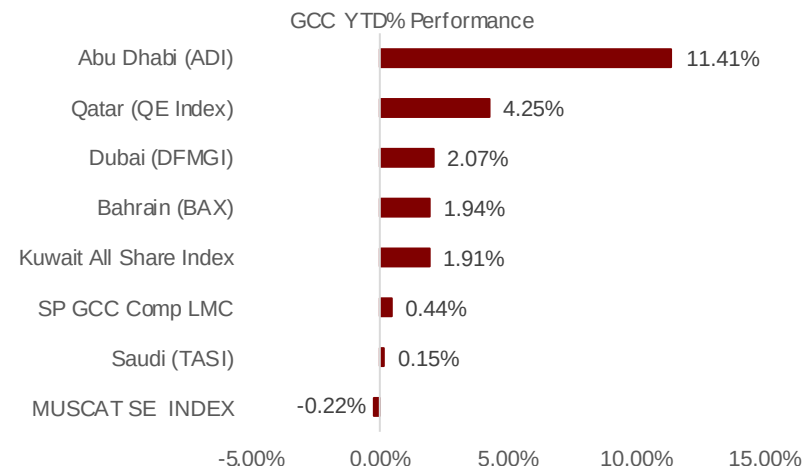
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.015	-1.93	-1.93	-2.22	-7.64	6.90	7.67 KWD	2.00	27.00
KFH	0.801	-3.49	-3.49	-10.90	-17.73	5.90	7.44 KWD	3.90	32.00
Zain	0.605	-1.47	-1.47	-3.97	-3.66	1.68	2.62 KWD	2.31	13.90
BOUBYAN BANK	0.755	-4.07	-4.07	-7.02	-10.83	5.99	2.82 KWD	3.74	34.00
Agility	1.020	-6.25	-6.25	-11.15	-7.69	7.94	2.28 KWD	1.19	2.20
Saudi Arabia									
ARAMCO	36.95	-4.03	-4.03	-11.81	-5.70	13.53	8,129.00 SAR	6.79	18.99
SABIC	101.00	-2.13	-2.13	-11.87	-22.90	-12.93	303.00 SAR	1.62	35.00
STC	99.30	-2.46	-2.46	-3.40	-7.88	-11.65	198.60 SAR	2.82	17.85
AL-RAJHI BANK	82.20	-4.64	-4.64	-16.89	-18.11	-7.25	328.80 SAR	4.20	24.64
NCB	62.80	-5.28	-5.28	-13.26	-11.42	-2.48	281.22 SAR	1.69	19.86
United Arab Emirates									
ETISALAT.AD	27.28	-0.80	-0.80	-10.09	-26.19	-13.94	237.23 AED	4.85	25.24
FAB.AD	19.00	-1.14	-1.14	-11.55	-19.49	2.03	209.89 AED	1.89	14.15
EMIRATES NBD	13.50	-0.37	-0.37	2.66	-10.00	-0.37	85.27 AED	1.05	9.30
DB ISLAMIC BK	5.66	0.18	0.18	-4.87	-8.27	5.20	40.98 AED	1.07	9.25
EMAAR PROPERT	5.31	-2.75	-2.75	-7.01	-11.50	8.59	43.43 AED	0.69	7.16
Qatar									
QNB	19.30	-2.67	-2.67	-10.44	-16.34	-4.41	178.26 QAR	1.84	14.24
INDUSTRIES QAT	15.79	-5.45	-5.45	-13.67	-16.89	1.94	95.53 QAR	2.64	10.24
QA ISLAMIC BK	21.25	-2.92	-2.92	-8.21	-10.86	15.93	50.21 QAR	2.06	14.50
MASRAF AL RAYA	4.43	-3.69	-3.69	-5.72	-14.29	-4.50	41.21 QAR	1.33	20.16
MESAIEED PETRO	2.60	-5.07	-5.07	-4.06	-10.65	24.40	32.66 QAR	2.03	16.96
OMAN									
BANK MUSCAT	0.530	-0.75	-0.75	1.15	3.92	14.98	1.99 OMR	0.95	8.33
OMANTEL	0.872	-1.80	0.00	0.93	-0.46	15.96	0.65 OMR	1.17	7.69
BANK DHOFAR	0.116	0.00	0.00	1.75	0.87	-7.94	0.35 QAR	0.50	14.93
NAT BANK OF OMAN	0.206	-0.48	-0.48	0.49	0.49	4.57	0.33 QAR	0.60	12.71
OMINVEST	0.306	0.00	0.00	-0.65	-9.47	0.00	0.20 QAR	0.68	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
8-June- 22	22.76%	15.69%	0.06%	1.09%	0.41%	6.59%	2.56%	11.22%	5.74%	4.05%
15-June- 22	22.85%	15.73%	0.06%	1.09%	0.41%	6.43%	17.65%	11.28%	5.74%	4.03%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -3.18 %The leading sector bottom performance indices today are Financial services -5.57 % Industrials -4.77 % Real estate -4.32 % respectively.

Telecommunication sector are down today by -1.87 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 10.26 %

KSA

Saudi Armco have negative performance today by -4.03 %, SABIC have negative performance today by -2.1 %

STC have negative performance today by -2.46 %, Al Rajhi Bank have negative performance today by -4.64 %

UAE

ETISALAT .AD have negative performance today by -0.8 %, FAB.AD have negative performance today by -1.14 %



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