



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, May 19, 2022



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



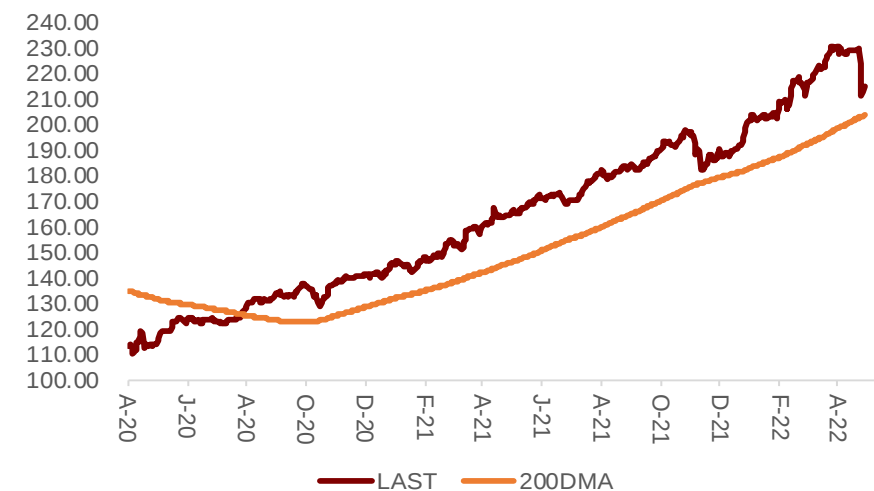
Market Watch

Thursday, May 19, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,427.96	-2.25	-3.17	-9.51	-5.06	10.16	11,879 SAR	2.23	21.23
Qatar (QE Index)	12,730.22	-2.23	-3.14	-6.33	-5.93	9.50	643 QAR	1.52	14.88
Dubai (DFMGI)	3,393.18	-1.37	1.91	-8.86	-3.87	6.08	458 AED	1.87	38.85
Abu Dhabi (ADI)	9,934.39	-0.62	6.76	-2.33	-1.03	16.00	1,435 AED	2.02	20.15
Bahrain (BAX)	1,922.14	-2.09	-1.92	-6.52	-7.30	6.95	19 BHD	1.28	171.52
MUSCAT SE INDEX	4,156.68	0.01	0.26	-0.04	-1.15	0.66	5 OMR	0.95	13.25
SP GCC Comp LMC	206.65	-2.09	-2.22	-9.94	-7.21	8.92			
Developed Markets									
MSCI World Index	2,655.91	-0.51	0.45	-5.15	-13.15	-17.95			
U.S. (S&P 500)	3,901.36	-0.58	-0.75	-5.59	-13.90	-18.16			
U.K. (FTSE 100)	7,389.98	-1.82	0.96	-3.21	-2.83	-1.11			
Japan (Topix)	1,877.37	-1.31	1.69	-2.08	-4.43	-6.64			
Emerging Markets									
MSCI EM Index	1,035.31	-1.77	2.74	-5.70	-11.11	-17.62			
China (SSE Composite)	3,146.57	0.36	1.37	1.64	-4.77	-14.91			
India (Sensex)	54,326.39	-2.61	-0.26	-7.48	-9.86	-9.38			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,829.50	-1.37	-0.50	-6.33	-3.89	11.16	46.71 KWD	2.53	23.49
Kuwait Premier Index	8,696.47	-1.43	-0.47	-6.57	-4.03	13.84	35.84 KWD	2.73	25.79
Kuwait Main Index	6,041.28	-1.13	-0.62	-5.45	-3.41	2.63	10.87 KWD	1.87	15.98
NIC 50	9,708.24	0.60	-0.48	-6.58	-4.04	13.91	28.60 KWD	2.71	24.79
Kuwait Sector									
Banking	1,839.60	-1.33	-1.37	-6.05	-4.69	13.36	27.49 KWD	1.46	26.79
Telecom	1,301.83	0.32	3.23	-7.85	3.14	19.50	3.99 KWD	0.95	14.75
Industrials	1,310.67	-2.40	1.12	-8.19	1.21	14.82	4.66 KWD	1.00	11.91
Financial services	1,524.94	-2.20	-0.91	-7.94	-8.18	7.14	3.95 KWD	0.81	19.15
Real estate	1,290.18	-1.78	0.84	-5.86	-7.53	-2.73	2.78 KWD	0.70	17.89
Basic materials	1,165.70	-0.40	0.74	0.53	0.34	13.75	1.04 KWD	1.70	11.79
Health care	492.00	0.00	0.00	2.07	-0.61	-38.27	0.24 KWD	2.98	13.83
Consumer services	664.66	-1.07	-3.97	-6.37	-6.62	-9.09	0.78 KWD	0.91	32.05
Insurance	1,525.68	-0.63	0.04	-1.02	-5.89	-0.50	0.64 KWD	0.73	8.89
Consumer Disc	1,526.78	-1.15	-0.09	-5.48	-1.05	14.23	0.20 KWD	1.18	13.01
Energy	1,191.14	-2.23	-2.88	-4.65	-8.29	-16.60	0.25 KWD	0.87	16.10
Technology	615.46	-4.95	-10.95	-8.04	-9.03	-10.00	0.01 KWD	0.74	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 edged up on Friday as a planned European Union ban on Russian oil and easing of COVID-19 lockdowns in China countered concerns that slowing economic growth will hurt demand. Brent futures for July delivery settled 0.46% higher at \$112.55 per barrel, while U.S. West Texas Intermediate (WTI) crude for June settled 0.9% higher at \$113.23 per barrel.

Kuwait Market

The market closed down today by -1.37%, closed at 7,829.5 value traded 82.2 million KD, Premier market value traded reached 63.9 million KD and closed at 8,696.47 down by 1.43%.

Saudi Market

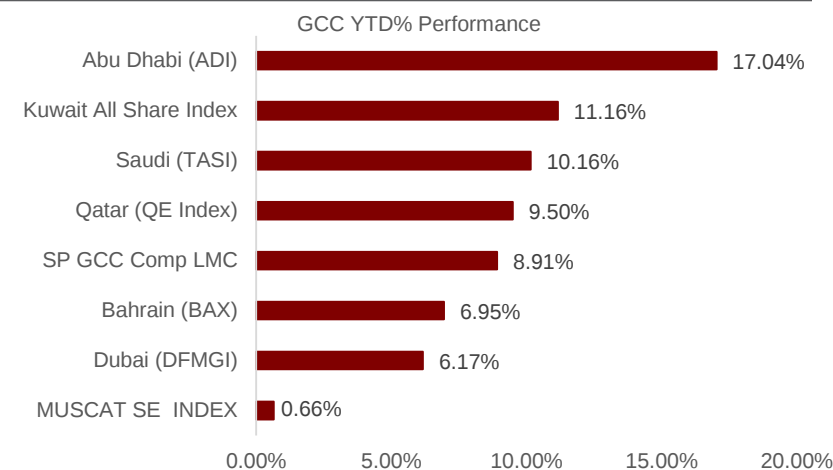
The Market closed down today by -2.25%, GCC Market closed down as fears grew that fast-rising inflation will drive a sharp rise in interest rates that brings the global economy to a standstill.

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Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.020	-0.49	-0.97	-3.04	-7.19	7.42	7.69 KWD	2.01	27.00
KFH	0.900	-2.17	-2.70	-8.63	-7.56	18.99	8.35 KWD	4.38	32.00
Zain	0.642	0.63	5.59	-5.73	2.23	7.90	2.77 KWD	2.45	14.75
BOUBAYAN BANK	0.850	0.47	-0.58	-8.49	0.39	19.32	3.17 KWD	4.21	34.00
Agility	1.130	-3.42	3.10	-9.60	2.26	19.58	2.52 KWD	1.31	2.43
Saudi Arabia									
ARAMCO	39.75	-2.33	-2.18	-2.62	1.45	22.14	8,745.00 SAR	7.30	20.08
SABIC	119.40	-1.32	-1.32	-8.85	-8.85	2.93	358.20 SAR	1.91	35.00
STC	105.00	0.00	-4.55	-9.48	-2.60	-6.58	210.00 SAR	2.98	18.41
AL-RAJHI BANK	93.50	-2.81	-6.69	-15.29	-6.85	5.50	374.00 SAR	4.77	27.50
NCB	69.80	-3.19	-5.68	-11.65	-1.55	8.39	312.56 SAR	1.88	21.59
United Arab Emirates									
ETISALAT.AD	31.80	0.95	7.29	-9.14	-13.96	0.32	269.77 AED	5.51	29.42
FAB.AD	19.70	-1.99	4.79	-12.21	-16.53	5.79	221.17 AED	1.99	14.67
EMIRATES NBD	13.35	0.75	1.14	-12.46	-11.00	-1.48	83.69 AED	1.03	9.20
DB ISLAMIC BK	5.90	-2.96	0.85	-8.53	-4.38	9.67	43.37 AED	1.13	9.64
EMAAR PROPERT	5.89	-0.51	7.09	-7.68	-1.83	20.45	48.26 AED	0.76	7.94
Qatar									
QNB	20.70	-5.91	-10.00	-10.97	-10.27	2.53	191.19 QAR	1.97	15.28
INDUSTRIES QAT	17.32	-0.57	1.35	-7.92	-8.84	11.81	104.79 QAR	2.90	11.23
QA ISLAMIC BK	24.00	-3.46	-2.04	-2.00	0.67	30.93	56.71 QAR	2.33	16.37
MASRAF AL RAYA	4.65	-1.44	-12.10	-13.73	-10.06	0.22	43.25 QAR	1.40	21.16
MESAIEED PETRO	2.53	-1.02	1.36	-2.16	-12.92	21.24	31.84 QAR	1.97	16.53
OMAN									
BANK MUSCAT	0.522	-1.51	-0.38	-0.76	2.35	13.24	1.98 OMR	0.95	8.33
OMANTEL	0.876	-1.35	2.34	1.86	0.00	16.49	0.67 OMR	1.20	7.69
BANK DHOFAR	0.115	0.00	-0.86	-2.54	0.00	-8.73	0.34 QAR	0.49	14.93
NAT BANK OF OMAN	0.200	0.50	1.01	0.00	-2.44	1.52	0.33 QAR	0.58	12.71
OMINVEST	0.310	0.00	-1.90	-1.27	-8.28	1.31	0.21 QAR	0.69	6.85



Leading Sector, Security Performance

Kuwait

The market is down today by -1.37 % The leading sector bottom performance indices today are Technology -4.95 % Industrials -2.4 % Energy -2.23 % respectively

Telecommunication sector are up today by + 0.32 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 8.34 %

KSA

Saudi Armco have negative performance today by -2.33 %, SABIC have negative performance today by -1.32231404958677 %

STC flat performance today 0 %, Al Rajhi Bank have negative performance today by -2.81 %

UAE

ETISALAT .AD has a positive performance today by + 0.95 %, FAB.AD have negative performance today by -1.99 %

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
11-May- 22	22.57%	13.37%	0.06%	0.46%	0.41%	6.88%	2.54%	11.11%	5.54%	3.99%
18-May- 22	22.6%	13.25%	0.06%	0.50%	0.42%	6.82%	2.53%	11.08%	5.50%	4.0%

End of Report

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