



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, January 19, 2022



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

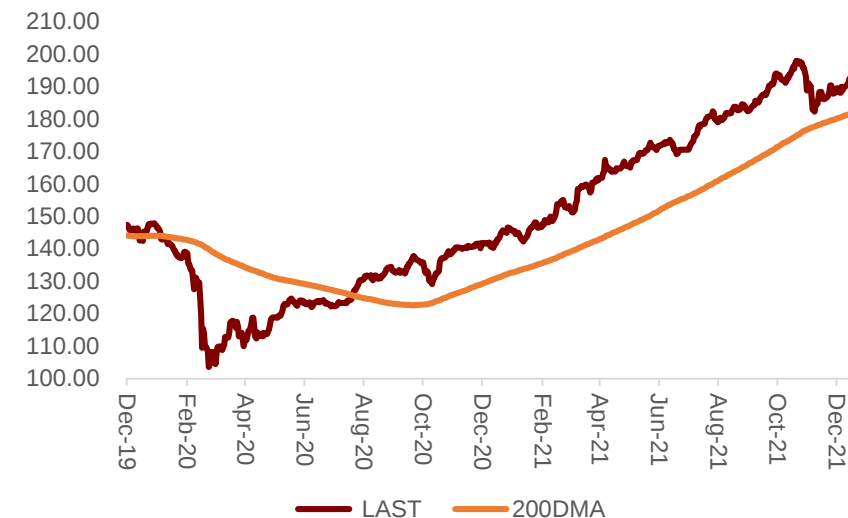


Market Watch Wednesday, January 19, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,260.130	0.54	1.50	8.67	8.67	8.67	10,461 SAR	2.61	18.95
Qatar (QE Index)	12,612.320	0.33	2.39	8.49	8.49	8.49	638 QAR	1.81	17.00
Dubai (DFMGI)	3,168.630	-0.29	-1.43	-0.85	-0.85	-0.85	316 AED	1.62	23.32
Abu Dhabi (ADI)	8,612.910	1.58	2.21	1.47	1.47	-1.28	1,435 AED	1.82	16.66
Bahrain (BAX)	1,813.539	0.16	1.76	0.91	0.91	0.91	19 BHD	1.52	9.98
MUSCAT SE INDEX	4,239.035	0.53	-0.65	2.65	2.65	2.65	5 OMR	0.89	13.25
SP GCC Comp LMC	203.923	0.74	1.36	7.48	7.48	7.48			
Developed Markets									
MSCI World Index	3,124.21	-1.64	-1.54	-3.33	-3.33	-3.33			
U.S. (S&P 500)	4,577.11	0.33	-1.84	-3.97	-3.97	-3.97			
U.K. (FTSE 100)	7,578.99	0.20	0.48	2.63	2.63	2.63			
Japan (Topix)	1,919.72	-2.97	-2.93	-3.64	-3.64	-3.64			
Emerging Markets									
MSCI EM Index	1,239.830	-0.14	-1.86	1.40	1.40	1.40			
China (SSE Composite)	3,558.180	-0.33	0.08	-1.69	-1.69	-1.69			
India (Sensex)	60,098.820	-1.08	-1.86	3.99	3.99	3.99			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,375.29	-0.01	-0.19	4.72	4.72	4.72	43.83 KWD	2.22	28.35
Kuwait Premier Index	8,038.93	-0.05	-0.24	5.23	5.23	5.23	32.95 KWD	2.37	28.42
Kuwait Main Index	6,071.42	0.11	-0.05	3.15	3.15	3.15	10.88 KWD	1.75	28.24
NIC 50	8,954.53	-0.16	-0.27	5.07	5.07	5.07	28.60 KWD	2.35	27.42
Kuwait Sector									
Banking	1,715.11	-0.04	-0.27	5.69	5.69	5.69	25.53 KWD	1.40	29.42
Telecom	1,096.62	0.04	-0.92	0.67	0.67	0.67	3.36 KWD	0.92	15.20
Industrials	1,167.40	-0.21	-1.07	2.27	2.27	2.27	4.15 KWD	0.88	13.99
Financial services	1,514.76	0.30	0.98	6.42	6.42	6.42	3.93 KWD	0.88	14.06
Real estate	1,369.02	-0.11	0.14	3.21	3.21	3.21	2.96 KWD	0.76	50.87
Basic materials	1,104.08	-0.01	2.52	7.74	7.74	7.74	0.99 KWD	1.89	29.43
Health care	811.18	0.00	1.74	1.78	1.78	1.78	0.40 KWD	6.16	13.01
Consumer services	736.20	0.19	0.75	0.70	0.70	0.70	0.75 KWD	0.92	15.58
Insurance	1,516.07	0.16	1.35	-1.13	-1.13	-1.13	0.64 KWD	0.82	8.57
Consumer Disc	1,453.44	-0.01	-2.96	8.74	8.74	8.74	0.23 KWD	1.34	9.00
Energy	1,432.51	0.05	-0.41	0.31	0.31	0.31	0.30 KWD	1.03	15.03
Technology	672.94	-2.63	-6.47	-1.60	-1.60	-1.60	0.01 KWD	0.82	0.00
Utilities	597.37	0.00	-0.44	-0.44	-0.44	-0.44	0.25 KWD	4.03	19.29

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices rose for a fourth day to a seven-year high as an outage on a pipeline from Iraq to Turkey increased concerns about an already tight supply outlook amid worrisome geopolitical troubles in Russia and the United Arab Emirates, Brent crude futures rose \$1.44, or 1.7%, to \$88.95 a barrel.

Kuwait Market

The market closed today down by - 0.01%, closed at 7,375.29 value traded 52.3 million KD, Premier market value traded reached 30.4 million KD and closed at 8,038.93 down by - 0.05%.

Saudi Market

The Market closed up today by + 0.54%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

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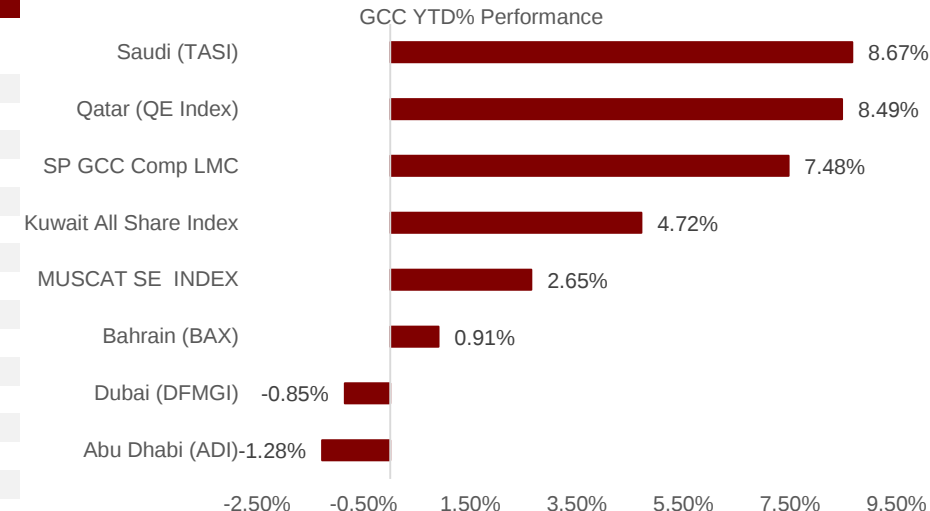
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.045	0.29	-1.05	4.41	4.41	4.41	7.50 KWD	1.93	27.00
KFH	0.908	-0.22	1.11	9.25	9.25	9.25	7.69 KWD	3.53	32.00
Zain	0.596	0.00	-1.33	0.00	0.00	0.00	2.58 KWD	2.17	13.65
BOUBYAN BANK	0.825	-0.60	-0.72	4.56	4.56	4.56	2.64 KWD	3.76	34.00
Agility	0.992	-0.40	-1.69	4.87	4.87	4.87	2.22 KWD	1.02	2.12
Saudi Arabia									
ARAMCO	36.70	-0.27	0.00	2.51	2.51	2.51	7,359.61 SAR	6.88	22.32
SABIC	126.60	1.77	3.77	9.14	9.14	9.14	373.18 SAR	2.15	35.00
STC	121.00	0.83	7.46	7.65	7.65	7.65	239.99 SAR	3.50	20.54
AL-RAJHI BANK	150.40	1.48	-0.40	6.06	6.06	6.06	370.48 SAR	5.82	27.07
NCB	74.10	0.82	1.51	15.06	15.06	15.06	329.12 SAR	2.04	21.17
United Arab Emirates									
ETISALAT.AD	30.12	1.01	0.53	-4.98	-4.98	-4.98	259.34 AED	5.63	28.10
FAB.AD	20.68	3.92	6.93	9.77	9.77	9.77	217.31 AED	1.99	17.88
EMIRATES NBD	12.80	-1.16	-2.66	-5.54	-5.54	-5.54	81.80 AED	0.96	10.25
DB ISLAMIC BK	5.45	0.00	-0.91	1.30	1.30	1.30	39.46 AED	1.03	14.53
EMAAR PROPERT	4.85	-0.21	-2.22	-0.82	-0.82	-0.82	39.75 AED	0.61	12.61
Qatar									
QNB	21.80	-0.23	3.76	7.92	7.92	7.92	201.82 QAR	2.04	16.53
INDUSTRIES QAT	16.80	1.45	3.59	7.94	7.94	7.94	100.19 QAR	2.68	15.04
QA ISLAMIC BK	20.10	0.40	0.40	9.66	9.66	9.66	47.31 QAR	1.91	14.08
MASRAF AL RAYA	5.16	-0.54	3.28	11.29	11.29	11.29	48.25 QAR	2.62	17.47
MESAIEED PETRO	2.46	-0.12	-1.09	17.13	17.13	17.13	30.88 QAR	1.85	18.84
OMAN									
BANK MUSCAT	0.528	0.76	1.54	8.68	8.68	8.68	1.87 OMR	0.89	8.33
OMANTEL	0.780	0.52	1.56	3.72	3.72	3.72	0.58 OMR	1.03	7.69
BANK DHOFAR	0.127	0.00	-7.97	0.79	0.79	0.79	0.38 QAR	0.54	14.93
NAT BANK OF OMAN	0.212	0.95	0.95	7.61	7.61	7.61	0.34 QAR	0.62	12.71
OMINVEST	0.306	0.00	-1.29	0.00	0.00	0.00	0.25 QAR	0.89	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
12-Jan-22	20.89%	12.62%	0.06%	0.38%	0.40%	4.92%	2.62%	10.35%	5.23%	4.36%
19-Jan-22	20.95%	12.50%	0.06%	0.46%	0.39%	5.15%	2.63%	10.41%	5.26%	4.34%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.01 % The leading sector bottom performance indices today are Technology -2.63 % Industrials -0.21 % Real estate -0.11 % respectively

Telecommunication sector are up today by + 0.04 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -3.96 %

KSA

Saudi Armco has a negative performance today by - 0.27 %, SABIC has a positive performance today by + 1.77 %

STC has a positive performance today by + 0.83 %, Al Rajhi Bank has a positive performance today by + 1.48 %

UAE

ETISALAT AD closed up today by + 1.01 %, and act defensively with COVID19



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