

شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, February 20, 2022





Market Watch

Sunday, February 20, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,463.17	-0.11	-0.11	1.56	10.47	10.47	10,574 SAR	2.54	18.74
Qatar (QE Index)	12,668.14	-0.53	-0.53	1.36	8.97	8.97	643 QAR	1.75	15.21
Dubai (DFMGI)	3,327.07	-0.09	2.14	3.87	4.10	4.10	325 AED	1.46	22.42
Abu Dhabi (ADI)	9,155.31	-0.57	1.74	5.18	7.86	7.86	1,435 AED	1.81	32.23
Bahrain (BAX)	1,929.735	0.22	0.22	6.63	7.37	7.37	19 BHD	1.50	10.29
MUSCAT SE INDEX	4,087.989	-0.11	-0.11	-0.68	-1.01	-1.01	5 OMR	0.87	13.25
SP GCC Comp LMC	209.238	0.20	0.20	2.79	10.28	10.28			

Developed Markets

MSCI World Index	2,983.59	-0.85	-1.83	-2.47	-7.83	-7.83			
U.S. (S&P 500)	4,348.87	-0.72	-1.58	-3.69	-9.00	-9.00			
U.K. (FTSE 100)	7,513.62	-0.32	-1.92	0.66	1.49	1.49			
Japan (Topix)	1,924.31	-0.36	-1.95	1.50	-3.41	-3.41			

Emerging Markets

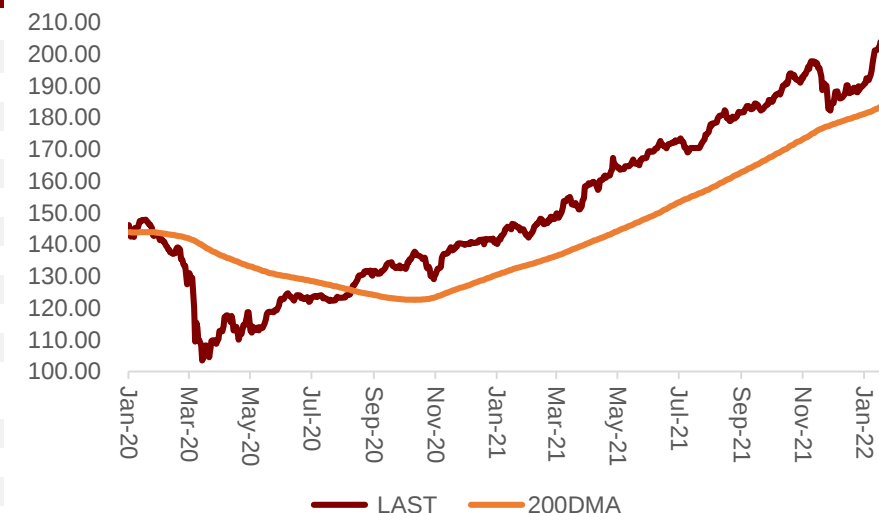
MSCI EM Index	1,231.774	-0.90	-0.90	1.95	0.74	0.74			
China (SSE Composite)	3,490.757	0.66	0.66	3.85	-3.55	-3.55			
India (Sensex)	57,832.97	-0.10	-0.10	-0.31	0.07	0.07			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,571.85	-0.75	-0.75	3.01	7.51	7.51	44.87 KWD	2.28	26.92
Kuwait Premier Index	8,217.36	-0.67	-0.67	2.55	7.57	7.57	33.50 KWD	2.37	26.56
Kuwait Main Index	6,313.37	-1.00	-1.00	4.38	7.26	7.26	11.37 KWD	2.01	28.07
NIC 50	9,123.82	-0.65	-0.65	2.38	7.06	7.06	28.60 KWD	2.35	25.56

Kuwait Sector

Banking	1,732.11	-0.94	-0.94	1.73	6.74	6.74	25.71 KWD	1.33	27.56
Telecom	1,244.11	-0.78	-0.78	13.29	14.20	14.20	3.84 KWD	0.89	15.59
Industrials	1,255.78	-0.07	-0.07	5.85	10.01	10.01	4.43 KWD	1.00	14.52
Financial services	1,544.24	-0.69	-0.69	1.70	8.50	8.50	3.95 KWD	0.87	23.47
Real estate	1,341.96	-0.48	-0.48	-0.60	1.17	1.17	2.90 KWD	0.72	52.75
Basic materials	1,137.08	-0.58	-0.58	2.27	10.96	10.96	1.02 KWD	1.86	29.60
Health care	813.95	-0.10	-0.10	0.88	2.12	2.12	0.40 KWD	6.16	13.29
Consumer services	711.04	-0.29	-0.29	-1.81	-2.75	-2.75	0.82 KWD	0.94	15.77
Insurance	1,636.76	-0.60	-0.60	7.11	6.74	6.74	0.67 KWD	0.81	8.68
Consumer Disc	1,580.98	-0.62	-0.62	10.21	18.28	18.28	0.22 KWD	1.30	9.02
Energy	1,385.00	-0.36	-0.36	-4.07	-3.02	-3.02	0.29 KWD	1.01	15.19
Technology	691.85	0.00	0.00	-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 prices versed losses to trade in the green on Friday, but were still headed for a weekly loss. The prospect of increased Iranian oil exports has eclipsed fears of potential supply disruption resulting from the Russia-Ukraine crisis, Brent crude futures advanced 57 cents, or 0.6%, to settle at \$93.54 per barrel.

Kuwait Market

The market closed today down by - 0.75%, closed at 7,571.85 value traded 54.0 million KD, Premier market value traded reached 34.1 million KD and closed at 8,217.36 down by - 0.67%.

Saudi Market

The Market closed down today by - 0.11%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



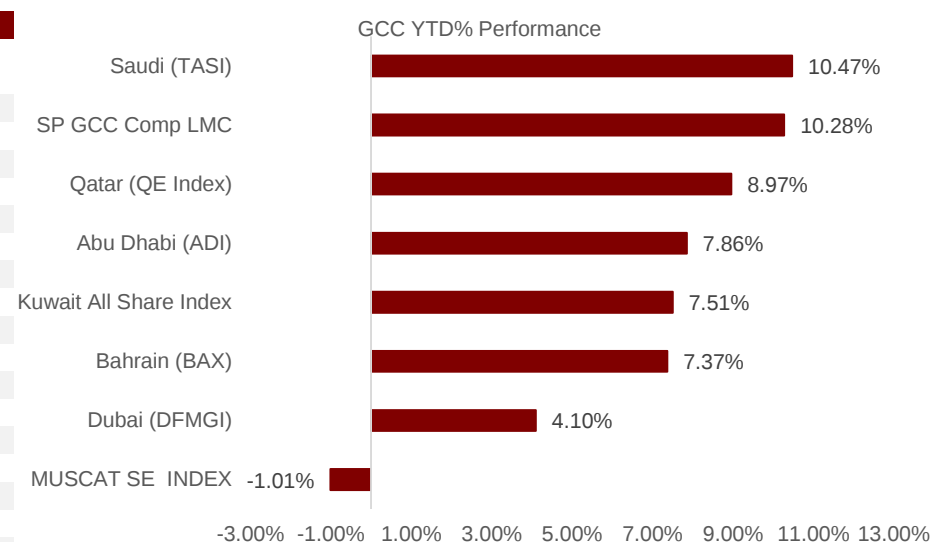
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.042	-1.51	0.87	0.68	4.61	4.61	7.54 KWD	1.89	27.00
KFH	0.930	-0.32	2.88	2.65	11.78	11.78	7.72 KWD	3.54	32.00
Zain	0.628	-0.32	-0.16	5.01	5.71	5.71	2.72 KWD	2.28	14.26
BOUBYAN BANK	0.814	-0.73	1.11	1.36	3.42	3.42	2.59 KWD	3.62	34.00
Agility	1.029	-0.58	1.18	2.59	8.99	8.99	2.29 KWD	1.05	2.17
Saudi Arabia									
ARAMCO	37.70	-0.13	-0.13	0.94	5.31	5.31	7,460.80 SAR	6.98	22.57
SABIC	119.20	-1.65	-1.65	-4.33	2.76	2.76	363.04 SAR	2.09	35.00
STC	115.40	-1.03	-1.03	-1.70	2.67	2.67	231.62 SAR	3.38	20.57
AL-RAJHI BANK	168.00	5.93	5.93	13.36	18.48	18.48	390.04 SAR	6.13	25.41
NCB	72.10	-0.96	-0.96	-2.30	11.96	11.96	323.35 SAR	1.97	20.52
United Arab Emirates									
ETISALAT.AD	33.36	-0.36	0.79	0.79	5.24	5.24	286.99 AED	6.23	30.96
FAB.AD	20.70	-1.05	0.00	3.50	9.87	9.87	228.23 AED	2.02	18.73
EMIRATES NBD	13.80	-1.43	0.36	3.37	1.85	1.85	87.48 AED	1.05	10.04
DB ISLAMIC BK	5.91	0.34	4.05	7.45	9.85	9.85	41.92 AED	1.08	10.98
EMAAR PROPERT	5.10	0.00	4.08	4.94	4.29	4.29	40.08 AED	0.61	9.42
Qatar									
QNB	20.65	-0.96	-4.04	-5.31	2.43	2.43	193.87 QAR	1.96	15.88
INDUSTRIES QAT	17.85	-0.61	-2.30	6.24	15.43	15.43	108.66 QAR	2.75	13.42
QA ISLAMIC BK	20.43	-0.29	0.99	3.98	11.18	11.18	47.80 QAR	1.93	14.22
MASRAF AL RAYA	4.92	-0.69	-2.17	0.12	6.06	6.06	46.13 QAR	1.88	21.66
MESAIEED PETRO	2.74	-0.65	0.48	12.53	31.10	31.10	35.01 QAR	2.10	21.23
OMAN									
BANK MUSCAT	0.516	-0.77	-0.77	-0.77	6.61	6.61	1.84 OMR	0.86	8.33
OMANTEL	0.812	1.00	4.10	3.05	7.98	7.98	0.60 OMR	1.07	7.69
BANK DHOFAR	0.116	-1.70	-1.69	-2.52	-7.94	-7.94	0.35 QAR	0.50	14.93
NAT BANK OF OMAN	0.190	0.00	2.70	0.53	-3.55	-3.55	0.30 QAR	0.54	12.71
OMINVEST	0.298	0.00	0.00	-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 down today by -0.75 %The leading sector bottom performance indices today are Banking -0.94 % Telecom -0.78 % Financial services -0.69 % respectively

Telecommunication sector are down today by -0.78 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 6.61 %

KSA

Saudi Armco has a negative performance today by - 0.13 %, SABIC has a negative performance today by - 1.65 %

STC has a negative performance today by -1.03 %, Al Rajhi Bank has a positive performance today by + 5.93 %

UAE

ETISALAT AD closed down today by - 0.36%, and act defensively with COVID19



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