



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, February 22, 2022



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



Market Watch

Tuesday, February 22, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,561.60	0.79	0.68	2.36	11.34	11.34	11,010 SAR	2.53	18.35
Qatar (QE Index)	12,690.80	0.16	-0.35	1.54	9.16	9.16	638 QAR	1.74	15.01
Dubai (DFMGI)	3,327.07	0.47	2.14	3.87	4.10	4.10	327 AED	1.45	20.59
Abu Dhabi (ADI)	9,155.31	1.22	1.74	5.18	7.86	7.86	1,435 AED	1.79	33.26
Bahrain (BAX)	1,928.386	-0.24	0.15	6.55	7.30	7.30	19 BHD	1.18	11.34
MUSCAT SE INDEX	4,058.073	-0.64	-0.84	-1.41	-1.73	-1.73	5 OMR	0.87	13.25
SP GCC Comp LMC	209.73	0.08	0.44	3.03	10.54	10.54			

Developed Markets

MSCI World Index	2,975.91	-0.26	-0.26	-2.72	-7.92	-7.92			
U.S. (S&P 500)	4,348.87	0.33	-1.58	-3.69	-8.76	-8.76			
U.K. (FTSE 100)	7,499.96	0.21	-0.18	0.48	1.56	1.56			
Japan (Topix)	1,881.08	-1.55	-2.25	-0.78	-5.58	-5.58			

Emerging Markets

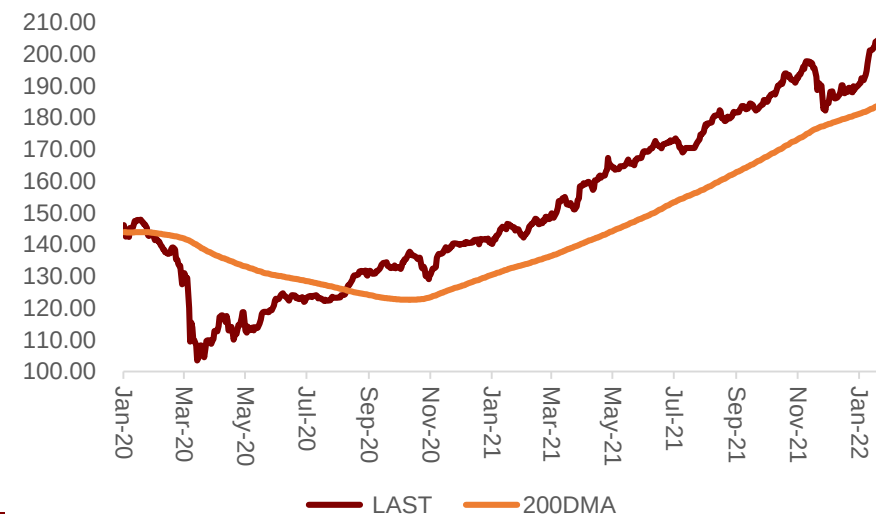
MSCI EM Index	1,219.46	-1.00	-1.00	0.93	-1.02	-1.02			
China (SSE Composite)	3,457.15	-0.96	-0.96	2.85	-5.02	-5.02			
India (Sensex)	57,300.68	-0.66	-1.00	-1.31	-1.72	-1.72			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,608.89	-0.23	-0.39	3.39	7.90	7.90	45.10 KWD	2.27	27.98
Kuwait Premier Index	8,269.31	-0.18	-0.23	3.01	8.05	8.05	33.79 KWD	2.40	27.29
Kuwait Main Index	6,315.58	-0.42	-0.89	4.49	7.37	7.37	11.31 KWD	1.85	30.11
NIC 50	9,172.08	0.53	-0.61	2.92	7.62	7.62	28.60 KWD	2.38	26.29

Kuwait Sector

Banking	1,741.00	-0.07	-0.61	2.07	7.10	7.10	25.86 KWD	1.32	28.29
Telecom	1,226.81	-0.96	-2.16	11.72	12.62	12.62	3.76 KWD	0.89	15.69
Industrials	1,272.74	-0.40	1.27	7.28	11.50	11.50	4.51 KWD	1.03	15.31
Financial services	1,570.75	-0.54	1.01	3.44	10.36	10.36	3.98 KWD	0.91	25.61
Real estate	1,344.77	-0.14	-0.27	-0.39	1.38	1.38	2.90 KWD	0.70	52.59
Basic materials	1,141.12	-0.91	-0.23	2.64	11.35	11.35	1.02 KWD	1.95	29.73
Health care	810.32	0.00	-0.54	0.43	1.67	1.67	0.40 KWD	6.16	13.01
Consumer services	714.07	-0.15	0.14	-1.39	-2.33	-2.33	0.81 KWD	0.92	20.18
Insurance	1,625.77	0.01	-1.27	6.39	6.02	6.02	0.68 KWD	0.81	8.77
Consumer Disc	1,586.79	0.63	-0.26	10.62	18.72	18.72	0.22 KWD	1.28	8.83
Energy	1,380.57	0.33	-0.68	-4.38	-3.33	-3.33	0.29 KWD	1.02	15.03
Technology	726.05	4.94	4.94	-4.04	6.17	6.17	0.01 KWD	0.86	0.00
Utilities	584.21	0.00	-0.45	-0.89	-2.63	-2.63	0.24 KWD	3.94	18.95

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices jumped as the crisis between Russia and Ukraine escalated, On Monday evening, Russian President Vladimir Putin ordered forces into two breakaway regions of eastern Ukraine and said he would recognize the independence of Donetsk and Luhansk, In Asia afternoon trade Tuesday, U.S. crude surged 3.72% to \$94.46 per barrel, while Brent jumped 2.46% per barrel to \$97.73.

Kuwait Market

The market closed today down by - 0.23%, closed at 7,608.89 value traded 75.0 million KD, Premier market value traded reached 52.2 million KD and closed at 8,269.31 down by - 0.18%.

Saudi Market

The Market closed up today by + 0.79%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

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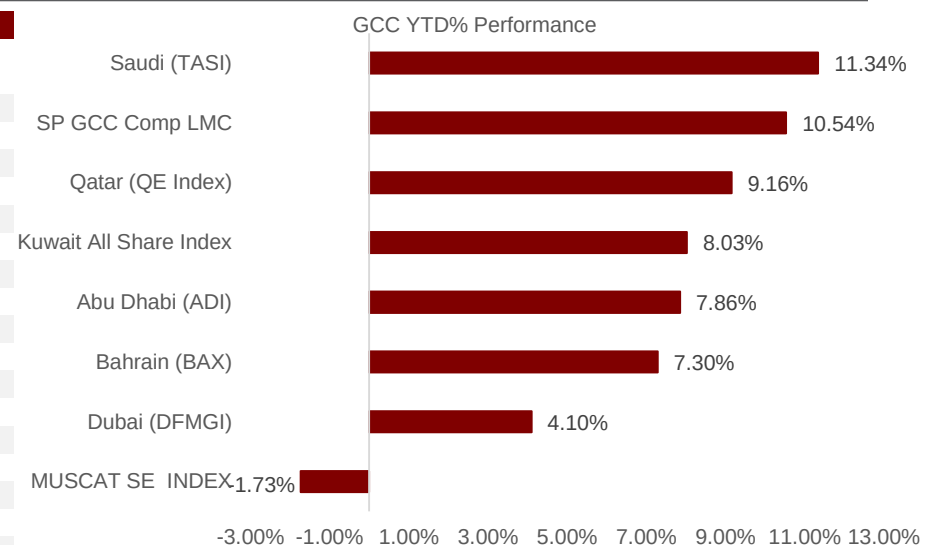
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.050	-0.10	-1.13	0.97	4.91	4.91	7.55 KWD	1.90	27.00
KFH	0.936	0.00	0.21	3.20	12.38	12.38	7.90 KWD	3.63	32.00
Zain	0.619	-0.80	-2.06	3.01	3.70	3.70	2.68 KWD	2.25	14.54
BOUBYAN BANK	0.816	-0.97	-0.49	1.24	3.29	3.29	2.59 KWD	3.63	34.00
Agility	1.019	-1.07	-1.93	1.10	7.41	7.41	2.27 KWD	1.04	2.19
Saudi Arabia									
ARAMCO	39.25	4.11	3.97	5.09	9.64	9.64	7,849.16 SAR	7.34	22.84
SABIC	121.00	1.51	-0.16	-2.89	4.31	4.31	362.96 SAR	2.09	35.00
STC	116.00	0.52	-0.51	-1.19	3.20	3.20	231.98 SAR	3.38	20.64
AL-RAJHI BANK	164.40	-2.14	3.66	10.93	15.94	15.94	410.96 SAR	6.11	26.86
NCB	72.50	0.55	-0.41	-1.76	12.58	12.58	324.62 SAR	1.98	21.04
United Arab Emirates									
ETISALAT.AD	33.34	0.79	-0.06	0.73	5.17	5.17	289.95 AED	6.29	31.04
FAB.AD	20.30	0.50	-1.93	1.50	7.75	7.75	221.68 AED	1.96	18.11
EMIRATES NBD	13.80	-0.36	0.00	3.37	1.85	1.85	87.17 AED	1.04	10.04
DB ISLAMIC BK	5.93	0.51	0.34	7.82	10.22	10.22	42.94 AED	1.10	11.18
EMAAR PROPERT	5.01	0.00	-1.76	3.09	2.45	2.45	40.98 AED	0.63	9.63
Qatar									
QNB	20.76	0.63	-0.58	-5.08	2.67	2.67	191.75 QAR	1.94	15.60
INDUSTRIES QAT	17.79	0.23	-0.89	5.76	14.91	14.91	107.63 QAR	2.73	13.28
QA ISLAMIC BK	20.50	0.59	-0.15	4.39	11.62	11.62	48.44 QAR	1.96	14.34
MASRAF AL RAYA	4.97	-0.20	-0.08	0.73	6.70	6.70	46.21 QAR	1.89	21.74
MESAIEED PETRO	2.66	-1.48	-3.81	8.83	26.79	26.79	33.42 QAR	1.96	20.69
OMAN									
BANK MUSCAT	0.522	0.77	0.38	0.38	7.85	7.85	1.87 OMR	0.87	8.33
OMANTEL	0.804	-1.95	1.01	2.03	6.91	6.91	0.61 OMR	1.08	7.69
BANK DHOFAR	0.116	0.00	-1.69	-2.52	-7.94	-7.94	0.35 QAR	0.49	14.93
NAT BANK OF OMAN	0.185	-2.63	-2.63	-2.12	-6.09	-6.09	0.30 QAR	0.54	12.71
OMINVEST	0.295	0.00	-1.01	-2.96	-3.59	-3.59	0.20 QAR	0.86	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 -0.23 % The leading sector bottom performance indices today are Telecom -0.96 % Basic materials -0.91 % Financial services -0.54 % respectively

Telecommunication sector are down today by -0.96 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 4.72 %

KSA

Saudi Armco has a positive performance today by + 4.11 %, SABIC have positive performance today by + 1.51 %

STC has a positive performance today by + 0.52 %, Al Rajhi Bank have negative performance today by -2.14 %

UAE

ETISALAT AD closed up today by + 0.79%, and act defensively with COVID19



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