

شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, January 20, 2022



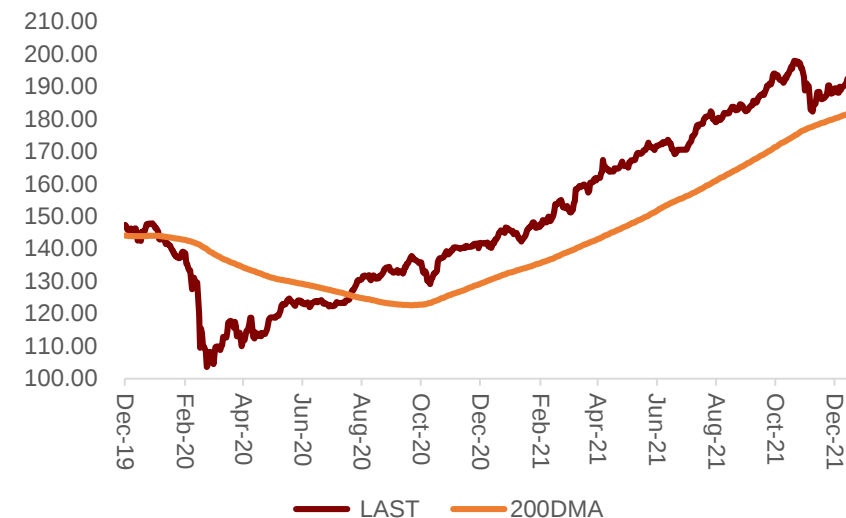


Market Watch

Thursday, January 20, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	12,290.960	0.25	1.75	8.95	8.95	8.95	10,461 SAR	2.61	18.95
Qatar (QE Index)	12,511.980	-0.80	1.57	7.62	7.62	7.62	638 QAR	1.81	17.00
Dubai (DFMGI)	3,169.050	0.01	-1.42	-0.84	-0.84	-0.84	316 AED	1.62	23.32
Abu Dhabi (ADI)	8,681.600	0.80	3.03	2.28	2.28	-1.28	1,435 AED	1.82	16.66
Bahrain (BAX)	1,812.615	-0.05	1.71	0.85	0.85	0.85	19 BHD	1.52	9.98
MUSCAT SE INDEX	4,235.827	-0.08	-0.73	2.57	2.57	2.57	5 OMR	0.89	13.25
SP GCC Comp LMC	204.150	0.11	1.47	7.60	7.60	7.60			
Developed Markets									
MSCI World Index	3,082.250	-0.53	-3.14	-4.78	-4.78	-4.78			
U.S. (S&P 500)	4,662.850	0.00	0.08	-2.42	-2.42	-2.42			
U.K. (FTSE 100)	7,585.010	-0.06	0.28	2.46	2.46	2.46			
Japan (Topix)	1,938.530	0.98	-3.34	-2.70	-2.70	-2.70			
Emerging Markets									
MSCI EM Index	1,255.742	1.28	-0.60	2.70	2.70	2.70			
China (SSE Composite)	3,555.063	-0.09	-0.01	-1.77	-1.77	-1.77			
India (Sensex)	59,464.620	-1.06	-2.89	2.89	2.89	2.89			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,364.48	-0.15	-0.34	4.56	4.56	4.56	43.83 KWD	2.22	28.35
Kuwait Premier Index	8,027.98	-0.14	-0.37	5.09	5.09	5.09	32.95 KWD	2.37	28.42
Kuwait Main Index	6,060.57	-0.18	-0.23	2.96	2.96	2.96	10.88 KWD	1.75	28.24
NIC 50	8,938.68	-0.18	-0.45	4.88	4.88	4.88	28.60 KWD	2.35	27.42
Kuwait Sector									
Banking	1,712.52	-0.15	-0.42	5.53	5.53	5.53	25.53 KWD	1.40	29.42
Telecom	1,093.87	-0.25	-1.17	0.41	0.41	0.41	3.36 KWD	0.92	15.20
Industrials	1,164.26	-0.27	-1.34	1.99	1.99	1.99	4.15 KWD	0.88	13.99
Financial services	1,521.15	0.42	1.41	6.87	6.87	6.87	3.93 KWD	0.88	14.06
Real estate	1,362.16	-0.50	-0.36	2.70	2.70	2.70	2.96 KWD	0.76	50.87
Basic materials	1,105.37	0.12	2.64	7.86	7.86	7.86	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	734.15	-0.28	0.47	0.42	0.42	0.42	0.75 KWD	0.92	15.58
Insurance	1,515.76	-0.02	1.33	-1.15	-1.15	-1.15	0.64 KWD	0.82	8.57
Consumer Disc	1,436.91	-1.14	-4.06	7.50	7.50	7.50	0.23 KWD	1.34	9.00
Energy	1,428.45	-0.28	-0.69	0.02	0.02	0.02	0.30 KWD	1.03	15.03
Technology	680.21	1.08	-5.46	-0.53	-0.53	-0.53	0.01 KWD	0.82	0.00
Utilities	594.74	0.00	-0.88	-0.88	-0.88	-0.88	0.25 KWD	4.03	19.29

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil steadied on Thursday, clawing back losses earlier in the session, as strong demand and short-term supply disruptions continue to support prices close to their highest levels since late 2014, Brent crude futures fell 17 cents, or 0.2%, to \$88.27 a barrel.

Kuwait Market

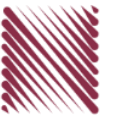
The market closed today down by - 0.15%, closed at 7,364.48 value traded 64.9 million KD, Premier market value traded reached 42.6 million KD and closed at 8,027.98 down by - 0.14%.

Saudi Market

The Market closed up today by + 0.25%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



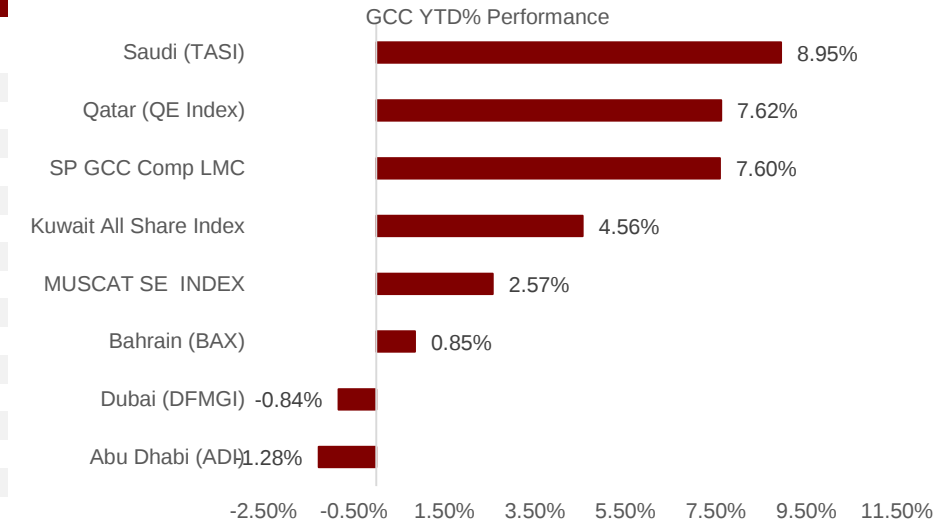
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.044	-0.10	-1.24	4.21	4.21	4.21	7.50 KWD	1.93	27.00
KFH	0.910	0.22	1.00	9.13	9.13	9.13	7.69 KWD	3.53	32.00
Zain	0.595	-0.17	-1.49	-0.17	-0.17	-0.17	2.58 KWD	2.17	13.65
BOUBAYAN BANK	0.828	0.36	-0.72	4.56	4.56	4.56	2.64 KWD	3.76	34.00
Agility	0.983	-0.91	-2.68	3.81	3.81	3.81	2.22 KWD	1.02	2.12
Saudi Arabia									
ARAMCO	36.85	0.41	0.41	2.93	2.93	2.93	7,359.61 SAR	6.88	22.32
SABIC	126.40	-0.16	3.61	8.97	8.97	8.97	373.18 SAR	2.15	35.00
STC	122.00	0.83	8.35	8.54	8.54	8.54	239.99 SAR	3.50	20.54
AL-RAJHI BANK	150.40	0.00	-0.40	6.06	6.06	6.06	370.48 SAR	5.82	27.07
NCB	74.00	-0.13	1.37	14.91	14.91	14.91	329.12 SAR	2.04	21.17
United Arab Emirates									
ETISALAT.AD	31.00	2.92	3.61	-2.21	-2.21	-2.21	259.34 AED	5.63	28.10
FAB.AD	20.56	-0.58	6.31	9.13	9.13	9.13	217.31 AED	1.99	17.88
EMIRATES NBD	12.70	-0.78	-4.51	-6.27	-6.27	-6.27	81.80 AED	0.96	10.25
DB ISLAMIC BK	5.50	0.92	0.18	2.23	2.23	2.23	39.46 AED	1.03	14.53
EMAAR PROPERT	4.80	-1.03	-4.00	-1.84	-1.84	-1.84	39.75 AED	0.61	12.61
Qatar									
QNB	21.80	0.00	3.57	7.73	7.73	7.73	201.82 QAR	2.04	16.53
INDUSTRIES QAT	16.64	-0.95	3.10	7.42	7.42	7.42	100.19 QAR	2.68	15.04
QA ISLAMIC BK	19.95	-0.75	-0.60	8.57	8.57	8.57	47.31 QAR	1.91	14.08
MASRAF AL RAYA	5.08	-1.55	1.62	9.50	9.50	9.50	48.25 QAR	2.62	17.47
MESAIEED PETRO	2.42	-1.55	-2.22	15.79	15.79	15.79	30.88 QAR	1.85	18.84
OMAN									
BANK MUSCAT	0.526	0.00	1.54	8.68	8.68	8.68	1.87 OMR	0.89	8.33
OMANTEL	0.776	-0.51	1.04	3.19	3.19	3.19	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	0.215	1.42	2.38	9.14	9.14	9.14	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 -0.15 % The leading sector bottom performance indices today are Consumer Disc -1.14 % Real estate -0.5 % Consumer services -0.28 % respectively

Telecommunication sector are down today by -0.25 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -4 %

KSA

Saudi Armco has a positive performance today by + 0.41 %, SABIC has a negative performance today by - 0.16 %

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

UAE

ETISALAT AD closed up today by + 2.92 %, and act defensively with COVID19



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