



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, February 23, 2022





Market Watch

Wednesday, February 23, 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	11,011 SAR	2.53	17.99
Qatar (QE Index)	12,749.24	0.46	0.11	2.01	9.66	9.66	636 QAR	1.74	15.11
Dubai (DFMGI)	3,335.79	0.80	0.17	4.14	4.38	4.38	327 AED	1.45	20.74
Abu Dhabi (ADI)	9,100.28	-0.03	-1.16	4.55	7.21	7.21	1,435 AED	1.79	33.41
Bahrain (BAX)	1,964.324	1.86	2.01	8.54	9.30	9.30	19 BHD	1.17	11.29
MUSCAT SE INDEX	4,044.86	-0.33	-1.16	-1.73	-2.05	-2.05	5 OMR	0.87	13.25
SP GCC Comp LMC	209.094	-0.30	0.13	2.71	10.20	10.20			

Developed Markets

MSCI World Index	2,975.91	0.89	-2.08	-2.72	-8.07	-8.07			
U.S. (S&P 500)	4,225.50	-1.84	-4.37	-6.42	-11.58	-11.58			
U.K. (FTSE 100)	7,484.33	-0.13	-2.31	0.27	1.10	1.10			
Japan (Topix)	1,910.68	1.57	-2.25	0.78	-4.10	-4.10			

Emerging Markets

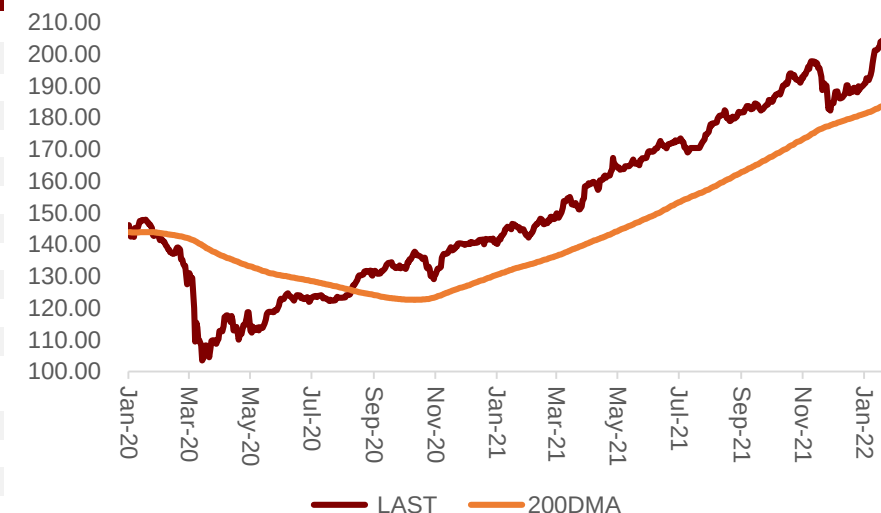
MSCI EM Index	1,219.46	1.06	-1.89	0.93	-0.27	-0.27			
China (SSE Composite)	3,490.612	0.97	0.65	3.80	-3.55	-3.55			
India (Sensex)	57,683.59	0.67	-0.36	-0.57	-0.19	-0.19			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,661.06	0.69	0.42	4.23	8.77	8.77	45.12 KWD	2.27	27.96
Kuwait Premier Index	8,322.18	0.64	0.59	3.86	8.94	8.94	33.80 KWD	2.40	27.28
Kuwait Main Index	6,368.21	0.83	-0.14	5.29	8.19	8.19	11.32 KWD	1.85	30.05
NIC 50	9,226.58	1.13	-0.61	3.53	8.26	8.26	28.60 KWD	2.38	26.28

Kuwait Sector

Banking	1,756.64	0.90	0.46	3.17	8.25	8.25	25.87 KWD	1.32	28.28
Telecom	1,222.09	-0.38	-2.54	11.29	12.18	12.18	3.76 KWD	0.89	15.33
Industrials	1,275.29	0.20	1.48	7.49	11.72	11.72	4.52 KWD	1.03	15.24
Financial services	1,591.39	1.31	2.34	4.80	11.81	11.81	3.99 KWD	0.89	25.80
Real estate	1,356.99	0.91	0.64	0.52	2.31	2.31	2.90 KWD	0.70	52.48
Basic materials	1,135.05	-0.53	-0.76	2.09	10.76	10.76	1.02 KWD	1.95	29.39
Health care	812.74	0.30	-0.25	0.73	1.97	1.97	0.40 KWD	6.16	13.01
Consumer services	726.14	1.69	1.83	0.28	-0.68	-0.68	0.81 KWD	0.92	20.49
Insurance	1,619.85	-0.36	-1.63	6.00	5.64	5.64	0.68 KWD	0.81	8.77
Consumer Disc	1,585.15	-0.10	-0.36	10.50	18.59	18.59	0.22 KWD	1.28	8.85
Energy	1,383.01	0.18	-0.50	-4.21	-3.16	-3.16	0.29 KWD	1.02	15.08
Technology	726.77	0.10	5.05	-3.94	6.28	6.28	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	18.86

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices took a breather on Wednesday after surging to seven-year highs the previous session as it became clear the first wave of U.S. and European sanctions on Russia for sending troops into eastern Ukraine would not disrupt oil supplies, Brent crude rose 30 cents, or 0.3%, to \$97.14 a barrel.

Kuwait Market

The market closed today up by + 0.69%, closed at 7,661.06 value traded 88.8 million KD, Premier market value traded reached 64.4 million KD and closed at 8,322.18 up by + 0.64%.

Saudi Market

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

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



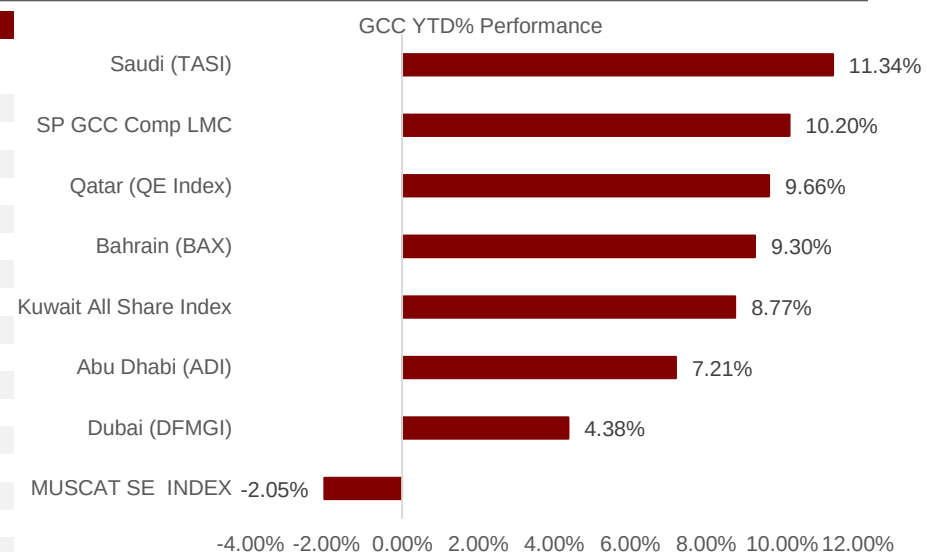
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.051	0.10	-0.28	1.83	5.82	5.82	7.55 KWD	1.90	27.00
KFH	0.940	0.43	1.07	4.08	13.34	13.34	7.90 KWD	3.63	32.00
Zain	0.619	0.00	-1.59	3.51	4.20	4.20	2.68 KWD	2.25	14.42
BOUBYAN BANK	0.816	0.00	-0.24	1.49	3.54	3.54	2.60 KWD	3.63	34.00
Agility	1.018	-0.10	-1.55	1.49	7.83	7.83	2.27 KWD	1.04	2.17
Saudi Arabia									
ARAMCO	40.55	7.56	7.42	8.57	13.27	13.27	7,850.00 SAR	7.34	22.81
SABIC	122.00	2.35	0.66	-2.09	5.17	5.17	363.00 SAR	2.09	35.00
STC	113.60	-1.56	-2.57	-3.24	1.07	1.07	231.98 SAR	3.38	20.38
AL-RAJHI BANK	159.00	-5.36	0.25	7.29	12.13	12.13	411.00 SAR	6.11	28.48
NCB	71.50	-0.83	-1.79	-3.12	11.02	11.02	324.62 SAR	1.98	20.84
United Arab Emirates									
ETISALAT.AD	33.50	0.48	0.42	1.21	5.68	5.68	289.95 AED	6.29	31.28
FAB.AD	20.14	-0.79	-2.71	0.70	6.90	6.90	221.68 AED	1.96	18.19
EMIRATES NBD	14.00	1.45	1.45	4.87	3.32	3.32	87.17 AED	1.04	10.00
DB ISLAMIC BK	6.00	1.18	1.52	9.09	11.52	11.52	42.94 AED	1.10	11.24
EMAAR PROPERT	5.05	0.80	-0.98	3.91	3.27	3.27	40.98 AED	0.63	9.63
Qatar									
QNB	20.89	0.63	-0.38	-4.90	2.87	2.87	191.18 QAR	1.94	15.70
INDUSTRIES QAT	17.85	0.34	-0.61	6.06	15.24	15.24	107.31 QAR	2.73	13.31
QA ISLAMIC BK	20.64	0.68	0.10	4.64	11.89	11.89	48.30 QAR	1.96	14.42
MASRAF AL RAYA	4.97	0.02	-0.10	0.71	6.68	6.68	46.07 QAR	1.89	21.70
MESAIEED PETRO	2.66	0.08	-3.56	9.12	27.13	27.13	33.32 QAR	1.96	17.95
OMAN									
BANK MUSCAT	0.520	-0.38	0.00	0.00	7.44	7.44	1.87 OMR	0.87	8.33
OMANTEL	0.812	0.50	2.01	3.05	7.98	7.98	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	0.00	-2.63	-2.12	-6.09	-6.09	0.30 QAR	0.54	12.71
OMINVEST	0.292	-1.02	-2.01	-3.95	-4.58	-4.58	0.20 QAR	0.86	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
16-Feb-22	20.95%	12.38%	0.06%	0.46%	0.40%	5.76%	2.48%	10.34%	5.25%	4.28%
23-Feb-22	21.08%	12.35%	0.06%	0.48%	0.40%	5.99%	2.48%	10.45%	5.25%	4.29%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.69 %The leading sector best performance indices today are Consumer services 1.69 % Financial services 1.31 % Real estate 0.91 % respectively

Telecommunication sector are down today by -0.38 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 3.18 %

KSA

Saudi Armco has a positive performance today by + 7.56 %, SABIC has a positive performance today by + 2.35 %

STC has a negative performance today by -1.56 %, Al Rajhi Bank has a negative performance today by -5.36 %

UAE

ETISALAT AD closed up today by + 0.48%, and act defensively with COVID19



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