



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, June 23, 2022





Market Watch

Thursday, June 23, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,310.67	-0.08	-4.34	-12.47	-13.60	0.26	11,045 SAR	1.94	18.35
Qatar (QE Index)	11,753.44	-1.59	-6.44	-9.03	-13.15	1.10	591 QAR	1.40	14.34
Dubai (DFMGI)	3,201.90	-1.14	-2.48	-4.43	-9.29	0.09	437 AED	1.29	33.58
Abu Dhabi (ADI)	9,238.34	-0.62	-2.74	-8.06	-7.08	8.91	1,435 AED	1.95	20.12
Bahrain (BAX)	1,816.35	-0.67	-1.91	-5.44	-12.40	1.06	18 BHD	1.18	171.34
MUSCAT SE INDEX	4,115.13	-0.52	-0.18	-0.02	-2.14	-0.35	5 OMR	0.91	13.25
SP GCC Comp LMC	189.54	-0.42	-4.11	-11.01	-14.90	-0.10			

Developed Markets

MSCI World Index	2,619.48	0.46	2.35	-8.67	-16.51	-21.12			
U.S. (S&P 500)	3,911.74	0.95	3.52	-8.14	-16.22	-20.36			
U.K. (FTSE 100)	7,208.81	-0.97	-0.35	-7.72	-6.59	-4.93			
Japan (Topix)	1,866.72	-0.05	-0.86	-3.19	-4.86	-7.06			

Emerging Markets

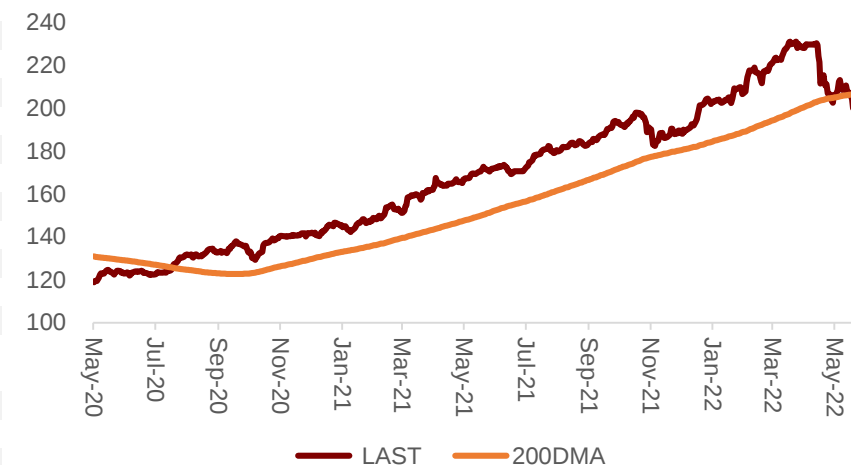
MSCI EM Index	1,011.18	0.18	-1.27	-7.64	-12.83	-19.21			
China (SSE Composite)	3,349.75	1.62	1.06	4.20	2.09	-8.78			
India (Sensex)	52,727.98	0.86	1.50	-5.94	-10.76	-10.28			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,240.19	0.32	-2.34	-7.46	-11.13	2.80	43.26 KWD	2.36	21.47
Kuwait Premier Index	8,017.69	0.16	-2.44	-7.59	-11.52	4.96	33.04 KWD	2.50	23.45
Kuwait Main Index	5,646.66	0.91	-2.00	-6.99	-9.72	-4.07	10.21 KWD	1.88	15.13
NIC 50	8,996.65	0.45	-2.45	-7.60	-11.53	5.56	28.60 KWD	2.48	22.45

Kuwait Sector

Banking	1,725.09	0.34	-1.25	-5.54	-10.63	6.31	25.79 KWD	1.30	24.45
Telecom	1,202.58	-0.49	-3.43	-7.08	-4.72	10.39	3.69 KWD	0.86	13.62
Industrials	1,163.41	-1.23	-6.36	-12.01	-10.16	1.92	4.14 KWD	0.94	10.68
Financial services	1,346.08	1.31	-3.40	-12.56	-18.95	-5.43	3.50 KWD	0.75	17.37
Real estate	1,185.00	1.37	-3.99	-10.23	-15.07	-10.66	2.56 KWD	0.62	22.79
Basic materials	1,003.90	1.02	-3.60	-16.77	-13.59	-2.04	0.89 KWD	1.45	9.64
Health care	471.03	0.00	-1.89	-1.89	-4.85	-40.90	0.23 KWD	2.87	13.05
Consumer services	510.95	-1.13	-8.97	-21.63	-28.21	-30.11	0.76 KWD	0.88	32.18
Insurance	1,545.51	1.41	0.98	2.82	-4.67	0.79	0.64 KWD	0.76	8.39
Consumer Disc	1,478.08	1.81	-1.69	-6.73	-4.21	10.58	0.16 KWD	0.97	9.85
Energy	1,152.24	-0.12	1.30	-1.24	-11.28	-19.32	0.24 KWD	0.80	15.26
Technology	640.20	0.00	-2.22	-4.35	-5.38	-6.38	0.01 KWD	0.77	0.00
Utilities	531.58	0.50	-2.42	-6.05	-9.42	-11.40	0.22 KWD	2.54	15.57

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices had been increasing since last year, spiking to highs after Russia launched an unprovoked war on Ukraine. But since the end of May, Brent has fallen from over \$120 per barrel to last trade at around \$109, or around 10% lower.

Kuwait Market

The market closed up today by +0.32%, closed at 7,240.19 value traded 47.2 million KD, Premier market value traded reached 36.3 million KD and closed at 8,017.69 up by +0.16%.

Saudi Market

The Market closed down today by -0.08%, GCC Market closed down as fears grew that fast-rising inflation will drive a sharp rise in interest rates that brings the global economy to a standstill.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



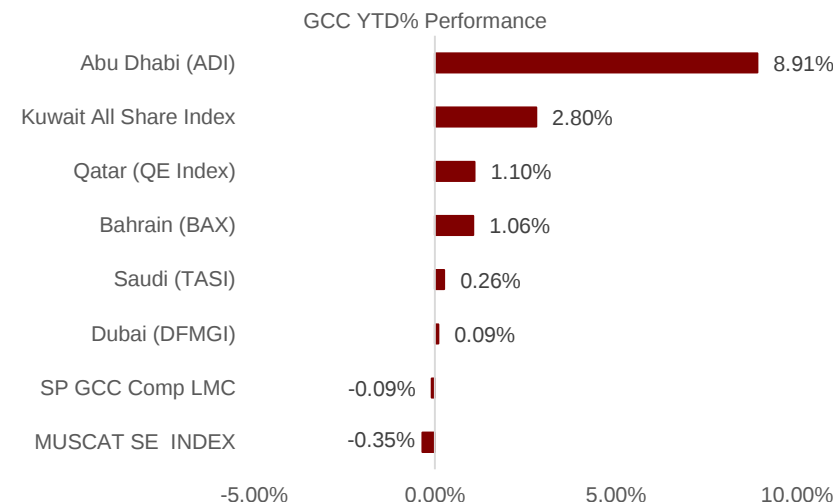
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.031	-0.39	-0.39	-0.67	-6.19	8.58	7.78 KWD	2.03	27.00
KFH	0.814	0.74	-1.93	-9.45	-16.40	7.62	7.56 KWD	3.97	32.00
Zain	0.593	-0.84	-3.42	-5.87	-5.57	-0.34	2.56 KWD	2.27	13.62
BOUBYAN BANK	0.761	1.06	-3.30	-6.28	-10.12	6.83	2.84 KWD	3.77	34.00
Agility	0.812	-3.52	-10.44	-15.12	-11.82	3.11	2.17 KWD	0.94	2.10
Saudi Arabia									
ARAMCO	37.20	0.00	-3.38	-11.22	-5.06	14.30	8,184.22 SAR	6.83	18.35
SABIC	100.40	-1.18	-2.71	-12.39	-23.36	-13.45	301.21 SAR	1.61	35.00
STC	97.00	0.94	-4.72	-5.64	-10.02	-13.70	194.01 SAR	2.75	16.85
AL-RAJHI BANK	83.00	0.97	-3.71	-16.08	-17.31	-6.35	332.01 SAR	4.24	23.50
NCB	63.40	-0.31	-4.37	-12.43	-10.58	-1.55	283.91 SAR	1.71	19.05
United Arab Emirates									
ETISALAT.AD	27.00	-1.46	-1.82	-11.01	-26.95	-14.83	235.68 AED	4.82	24.98
FAB.AD	18.48	-0.43	-3.85	-13.97	-21.69	-0.76	203.50 AED	1.83	13.76
EMIRATES NBD	13.25	-1.85	-2.21	0.76	-11.67	-2.21	82.12 AED	1.01	9.13
DB ISLAMIC BK	5.68	-1.05	0.53	-4.54	-7.94	5.58	41.56 AED	1.09	9.28
EMAAR PROPERT	5.08	-1.93	-6.96	-11.03	-15.33	3.89	42.13 AED	0.66	6.85
Qatar									
QNB	19.76	-0.20	-0.35	-8.31	-14.35	-2.13	182.51 QAR	1.88	14.58
INDUSTRIES QAT	14.55	-4.40	-12.87	-20.45	-23.42	-6.07	88.03 QAR	2.44	9.44
QA ISLAMIC BK	22.08	0.78	0.87	-4.62	-7.38	20.46	52.17 QAR	2.15	15.06
MASRAF AL RAYA	4.02	-0.74	-12.61	-14.45	-22.22	-13.34	37.40 QAR	1.21	18.29
MESAIEED PETRO	2.40	-0.12	-12.38	-11.44	-17.53	14.83	30.15 QAR	1.87	15.66
OMAN									
BANK MUSCAT	0.526	-0.75	-1.50	0.38	3.14	14.11	1.98 OMR	0.94	8.33
OMANTEL	0.868	-2.25	-0.46	0.46	-0.91	15.43	0.65 OMR	1.16	7.69
BANK DHOFAR	0.115	-0.86	-0.86	0.88	0.00	-8.73	0.35 QAR	0.49	14.93
NAT BANK OF OMAN	0.208	0.00	0.48	1.46	1.46	5.58	0.34 QAR	0.60	12.71
OMINVEST	0.304	0.00	-0.65	-1.30	-10.06	-0.65	0.20 QAR	0.68	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
15-June- 22	22.85%	15.73%	0.06%	1.09%	0.41%	6.43%	17.65%	11.28%	5.74%	4.03%
22-June- 22	23.05%	15.83%	0.06%	1.07%	0.41%	6.37%	17.58%	11.37%	5.70%	3.99%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.32 %The leading sector best performance indices today are Consumer Disc 1.81 % Insurance 1.41 % Real estate 1.37 % respectively

Telecommunication sector are down today by -0.49 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 7.59 %

KSA

Saudi Armco has a flat performance today, SABIC has a negative performance today by - 1.18 %

STC has a positive performance today by + 0.94 %, Al Rajhi Bank has a positive performance today by + 0.97 %

UAE

ETISALAT .AD have negative performance today by -1.46 %, FAB.AD have negative performance today by -0.43 %



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