



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, April 24, 2022



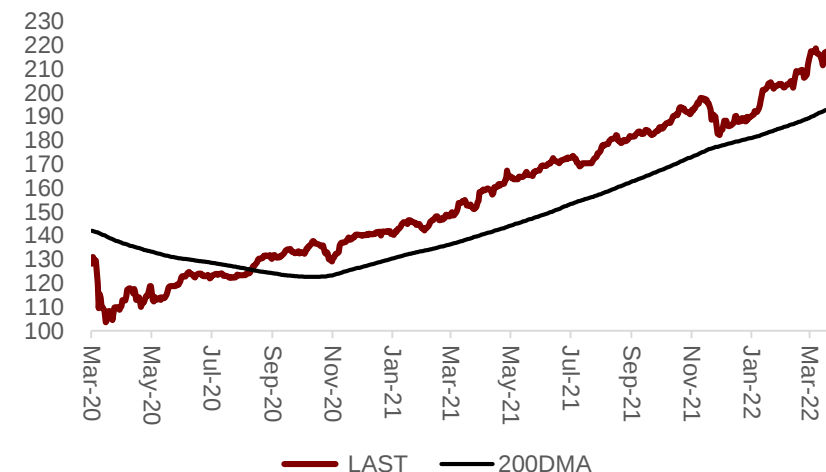


Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	13,463.09	-0.53	-1.16	2.85	2.85	19.34	12,017 SAR	2.42	21.75
Qatar (QE Index)	13,986.98	-0.46	-0.98	3.35	3.35	20.31	703 QAR	1.77	16.97
Dubai (DFMGI)	3,682.82	0.55	2.25	4.43	4.43	15.24	358 AED	1.62	23.79
Abu Dhabi (ADI)	10,131.68	0.24	1.62	1.84	1.84	19.36	1,435 AED	1.82	20.67
Bahrain (BAX)	2,079.81	-0.32	-0.99	0.30	0.30	15.72	21 BHD	1.21	17.38
MUSCAT SE INDEX	4,219.30	-0.38	-0.47	0.34	0.34	2.17	5 OMR	0.94	13.25
SP GCC Comp LMC	228.03	-0.31	-0.77	2.37	2.37	20.17			
Developed Markets									
MSCI World Index	2,882.45	-2.62	-2.61	-5.59	-5.59	-10.81			
U.S. (S&P 500)	4,271.78	-2.77	-2.75	-5.71	-5.71	-10.37			
U.K. (FTSE 100)	7,521.68	-1.39	-1.24	0.08	0.08	1.86			
Japan (Topix)	1,905.15	-1.19	0.47	-2.12	-2.12	-4.38			
Emerging Markets									
MSCI EM Index	1,075.60	-1.04	-3.35	-5.80	-5.80	-12.70			
China (SSE Composite)	3,086.92	0.23	-3.87	-5.08	-5.08	-15.19			
India (Sensex)	57,197.15	-1.23	-1.96	-2.34	-2.34	-1.81			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	8,237.10	-0.36	-0.91	1.11	1.11	16.95	48.99 KWD	2.64	28.90
Kuwait Premier Index	9,142.42	-0.27	-0.35	0.89	0.89	19.68	37.61 KWD	2.85	29.27
Kuwait Main Index	6,372.15	-0.70	-2.84	1.88	1.88	8.25	11.37 KWD	1.93	27.73
NIC 50	10,368.18	1.13	-0.36	0.88	0.88	21.66	28.60 KWD	2.83	28.27
Kuwait Sector									
Banking	1,927.93	-0.37	-1.20	-0.12	-0.12	18.80	28.72 KWD	1.34	30.27
Telecom	1,366.88	-0.37	-3.35	8.30	8.30	25.47	4.19 KWD	0.96	18.67
Industrials	1,412.12	-0.69	1.66	9.05	9.05	23.71	5.03 KWD	0.99	25.39
Financial services	1,635.00	-0.30	0.69	-1.55	-1.55	14.87	4.18 KWD	0.92	20.52
Real estate	1,372.58	-0.42	-1.91	-1.62	-1.62	3.48	2.96 KWD	0.77	47.50
Basic materials	1,146.66	0.00	-1.03	-1.30	-1.30	11.89	1.02 KWD	1.82	29.25
Health care	485.95	0.94	-0.62	-1.83	-1.83	-39.03	0.24 KWD	3.05	15.00
Consumer services	703.06	0.08	-0.06	-1.22	-1.22	-3.84	0.82 KWD	0.92	16.89
Insurance	1,548.32	-0.10	0.43	-4.50	-4.50	0.97	0.65 KWD	0.76	9.69
Consumer Disc	1,599.90	0.25	1.81	3.69	3.69	19.70	0.21 KWD	1.29	10.54
Energy	1,238.95	-0.90	-4.82	-4.61	-4.61	-13.25	0.26 KWD	0.84	16.53
Technology	694.04	0.00	1.38	2.58	2.58	1.49	0.01 KWD	0.82	0.00
Utilities	584.21	0.91	-0.45	-0.45	-0.45	-2.63	0.24 KWD	3.94	18.86

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil slumped to the lowest in almost two weeks on Sunday, extending last week's decline as concern grew that prolonged Covid-19 lockdowns in Shanghai and potential increases to U.S. interest rates would hurt global growth and oil demand.

Kuwait Market

The market closed today down by – 0.36%, closed at 8,237.10 value traded 46.42 million KD, Premier market value traded reached 30.18 million KD and closed at 9,142.42 down by – 0.27%.

Saudi Market

The Market closed down today by - 0.53%, and the current macroeconomic sentiments and volatility of oil prices linked by geopolitical tension .

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



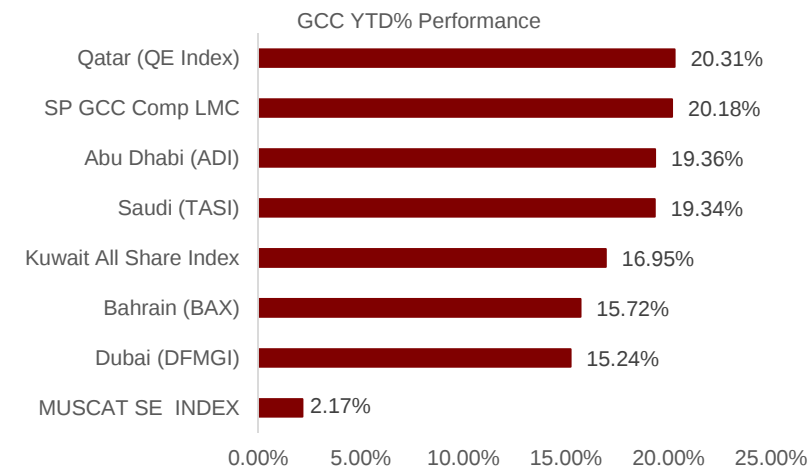
	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.048	0.48	-0.29	-4.64	-4.64	10.37	7.91 KWD	2.07	27.00
KFH	0.976	-0.41	-1.91	0.24	0.24	29.04	9.06 KWD	4.75	32.00
Zain	0.650	-0.15	3.17	3.50	3.50	9.24	2.81 KWD	2.36	15.14
BOUBYAN BANK	0.925	2.10	0.87	3.43	3.43	22.94	3.09 KWD	4.33	34.00
Agility	1.227	-0.57	0.00	11.04	11.04	29.84	2.74 KWD	1.28	2.64
Saudi Arabia									
ARAMCO	43.00	0.00	0.00	-0.23	-0.23	20.11	8,599.77 SAR	7.72	21.75
SABIC	125.20	-0.32	-2.95	-4.43	-4.43	7.93	375.59 SAR	2.09	35.00
STC	112.20	-1.58	-1.23	4.08	4.08	-0.18	224.39 SAR	3.23	20.14
AL-RAJHI BANK	179.80	0.00	4.90	11.96	11.96	26.80	449.49 SAR	6.68	30.48
NCB	73.50	0.55	-2.78	3.67	3.67	14.13	329.12 SAR	2.01	21.13
United Arab Emirates									
ETISALAT.AD	35.40	0.85	-4.32	-4.22	-4.22	11.67	307.87 AED	6.47	33.04
FAB.AD	22.98	0.44	3.05	-2.63	-2.63	23.40	253.87 AED	2.25	20.84
EMIRATES NBD	15.20	1.33	2.70	1.33	1.33	12.18	96.01 AED	1.18	10.47
DB ISLAMIC BK	6.29	0.64	0.32	1.94	1.94	16.91	45.54 AED	1.17	11.92
EMAAR PROPERT	6.32	0.48	3.61	5.33	5.33	29.24	51.70 AED	0.84	12.14
Qatar									
QNB	23.16	-0.60	-5.00	0.39	0.39	14.71	214.30 QAR	2.21	17.09
INDUSTRIES QAT	19.96	-1.19	0.81	5.05	5.05	28.86	120.98 QAR	3.06	14.93
QA ISLAMIC BK	25.06	-0.83	0.64	5.12	5.12	36.72	59.32 QAR	2.43	17.09
MASRAF AL RAYA	5.78	0.56	1.87	11.80	11.80	24.57	53.85 QAR	2.20	25.24
MESAIEED PETRO	2.74	-1.08	-5.52	-5.84	-5.84	31.10	34.49 QAR	2.02	18.49
OMAN									
BANK MUSCAT	0.540	0.37	-1.46	5.88	5.88	17.15	2.02 OMR	0.94	8.33
OMANTEL	0.884	-0.45	-0.90	0.91	0.91	17.55	0.66 OMR	1.14	7.69
BANK DHOFAR	0.115	0.00	-1.71	0.00	0.00	-8.73	0.34 QAR	0.49	14.93
NAT BANK OF OMAN	0.204	-2.86	2.00	-0.49	-0.49	3.55	0.33 QAR	0.60	12.71
OMINVEST	0.316	0.00	-1.25	-6.51	-6.51	3.27	0.21 QAR	0.72	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
13-Apr-22	22.10%	13.08%	0.06%	0.49%	0.36%	6.80%	2.52%	10.75%	5.49%	3.98%
20-Apr-22	22.19%	12.97%	0.06%	0.50%	0.39%	6.94%	2.47%	10.90%	5.51%	3.96%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.36 %The leading sector bottom performance indices today are Energy -0.9 % Industrials -0.69 % Real estate -0.42 % respectively

Telecommunication sector are down today by -0.37 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 8.52 %

KSA

Saudi Armco flat performance today 0 %, SABIC have negative performance today by - 0.32%.

STC have negative performance today by -1.58 %, Al Rajhi Bank flat performance today 0 %.

UAE

ETISALAT AD has a positive performance today by +0.86%, FAB.AD has a positive performance today by + 0.44 %



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