

شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, January 23, 2022



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

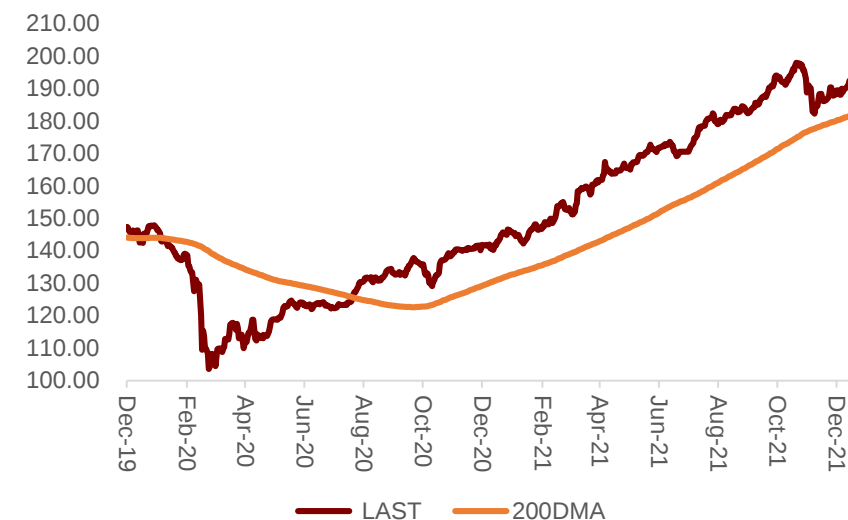


Market Watch

Sunday, January 23, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	12,139.830	-1.23	-1.23	7.61	7.61	7.61	10,498 SAR	2.56	18.90
Qatar (QE Index)	12,488.090	-0.19	-0.19	7.42	7.42	7.42	636 QAR	1.82	16.80
Dubai (DFMGI)	3,209.820	1.29	1.29	0.44	0.44	0.44	320 AED	1.61	23.18
Abu Dhabi (ADI)	8,705.950	0.28	0.28	2.56	2.56	2.56	1,435 AED	1.84	16.38
Bahrain (BAX)	1,814.540	0.11	1.81	0.96	0.96	0.96	18 BHD	1.52	9.97
MUSCAT SE INDEX	4,224.429	-0.27	-0.27	2.30	2.30	2.30	5 OMR	0.89	13.25
SP GCC Comp LMC	202.832	-0.65	-0.65	6.90	6.90	6.90			
Developed Markets									
MSCI World Index	3,025.100	-1.85	-1.85	-6.55	-6.55	-6.55			
U.S. (S&P 500)	4,397.940	-5.68	-1.89	-7.97	-7.97	-7.97			
U.K. (FTSE 100)	7,494.130	-1.20	-1.20	1.23	1.23	1.23			
Japan (Topix)	1,927.180	-0.59	-0.59	-3.27	-3.27	-3.27			
Emerging Markets									
MSCI EM Index	1,244.307	-0.91	-0.91	1.76	1.76	1.76			
China (SSE Composite)	3,522.568	-0.91	-0.91	-2.67	-2.67	-2.67			
India (Sensex)	59,037.180	-0.72	-0.72	2.15	2.15	2.15			
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	7,350.62	-0.19	-0.19	4.37	4.37	4.37	43.70 KWD	2.21	28.19
Kuwait Premier Index	8,015.27	-0.16	-0.16	4.92	4.92	4.92	32.85 KWD	2.37	28.41
Kuwait Main Index	6,043.56	-0.28	-0.28	2.67	2.67	2.67	10.85 KWD	1.74	27.62
NIC 50	8,921.190	-0.20	-0.20	4.68	4.68	4.68	28.60 KWD	2.35	27.41
Kuwait Sector									
Banking	1,707.69	-0.28	-0.28	5.23	5.23	5.23	25.45 KWD	1.36	29.41
Telecom	1,094.82	0.09	0.09	0.50	0.50	0.50	3.35 KWD	0.94	15.20
Industrials	1,169.19	0.42	0.42	2.43	2.43	2.43	4.13 KWD	0.91	14.07
Financial services	1,512.25	-0.59	-0.59	6.25	6.25	6.25	3.95 KWD	0.90	13.94
Real estate	1,359.38	-0.20	-0.20	2.49	2.49	2.49	2.94 KWD	0.76	50.09
Basic materials	1,107.69	0.21	0.21	8.09	8.09	8.09	0.99 KWD	1.91	29.42
Health care	811.18	0.00	0.00	1.78	1.78	1.78	0.40 KWD	6.16	13.01
Consumer services	734.15	0.00	0.00	0.42	0.42	0.42	0.74 KWD	0.91	15.47
Insurance	1,518.57	0.19	0.19	-0.97	-0.97	-0.97	0.64 KWD	0.85	8.57
Consumer Disc	1,428.28	-0.60	-0.60	6.86	6.86	6.86	0.22 KWD	1.34	8.97
Energy	1,438.86	0.73	0.73	0.75	0.75	0.75	0.30 KWD	1.02	15.19
Technology	696.95	2.46	2.46	1.92	1.92	1.92	0.01 KWD	0.81	0.00
Utilities	594.74	0.00	0.00	-0.88	-0.88	-0.88	0.25 KWD	4.01	19.20

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices slid for a second day in a row on Friday, pressured by an unexpected rise in U.S. crude and fuel inventories while investors took profits after the benchmarks touched seven-year highs earlier in the week,

However, both crude benchmarks rose for a fifth week in a row, gaining around 2% this week. Prices were up more than 10% so far this year on concerns over tightening supplies. Brent futures fell 49 cents, or 0.6%, to settle at \$87.89 a barrel.

Kuwait Market

The market closed today down by - 0.19%, closed at 7,350.62 value traded 51.0 million KD, Premier market value traded reached 27.7 million KD and closed at 8,015.27 down by - 0.16%.

Saudi Market

The Market closed down today by -1.23%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

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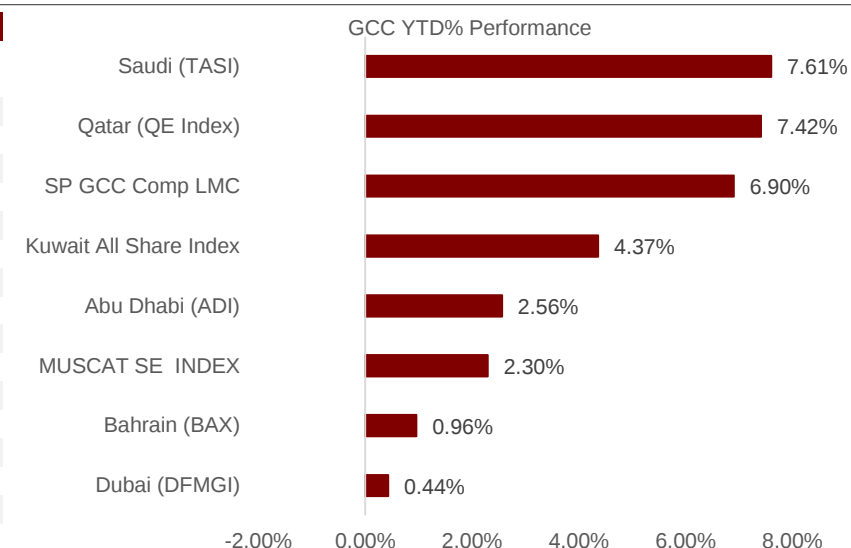
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.042	-0.19	-0.76	4.71	4.71	4.71	7.51 KWD	1.94	27.00
KFH	0.906	-0.44	0.78	8.89	8.89	8.89	7.68 KWD	3.53	32.00
Zain	0.596	0.17	-1.16	0.17	0.17	0.17	2.57 KWD	2.17	13.62
BOUBYAN BANK	0.824	-0.48	-0.72	4.56	4.56	4.56	2.63 KWD	3.75	34.00
Agility	0.991	0.81	-1.59	4.97	4.97	4.97	2.19 KWD	1.00	2.09
Saudi Arabia									
ARAMCO	36.50	-0.95	-0.95	1.96	1.96	1.96	7,369.61 SAR	6.89	22.20
SABIC	125.00	-1.11	-1.11	7.76	7.76	7.76	379.18 SAR	2.18	35.00
STC	119.60	-1.97	-1.97	6.41	6.41	6.41	243.99 SAR	3.56	21.42
AL-RAJHI BANK	149.40	-0.66	-0.66	5.36	5.36	5.36	375.98 SAR	5.91	27.14
NCB	73.40	-0.81	-0.81	13.98	13.98	13.98	331.35 SAR	2.06	21.49
United Arab Emirates									
ETISALAT.AD	32.00	3.23	6.81	0.95	0.95	0.95	278.30 AED	6.04	29.21
FAB.AD	20.30	-1.26	4.96	7.75	7.75	7.75	221.68 AED	2.03	18.47
EMIRATES NBD	13.50	6.30	2.66	-0.37	-0.37	-0.37	85.27 AED	1.00	10.05
DB ISLAMIC BK	5.52	0.36	0.36	2.60	2.60	2.60	39.97 AED	1.05	14.67
EMAAR PROPERT	4.83	0.63	-2.62	-1.23	-1.23	-1.23	39.51 AED	0.61	12.46
Qatar									
QNB	21.75	-0.23	3.57	7.73	7.73	7.73	201.35 QAR	2.04	16.49
INDUSTRIES QAT	16.69	0.30	3.47	7.81	7.81	7.81	100.67 QAR	2.69	15.11
QA ISLAMIC BK	19.76	-0.95	-2.20	6.82	6.82	6.82	47.14 QAR	1.91	14.03
MASRAF AL RAYA	5.09	0.28	1.80	9.70	9.70	9.70	47.24 QAR	2.57	17.11
MESAIEED PETRO	2.43	0.33	-2.02	16.03	16.03	16.03	30.37 QAR	1.82	18.52
OMAN									
BANK MUSCAT	0.524	0.00	-0.38	8.26	8.26	8.26	1.87 OMR	0.89	8.33
OMANTEL	0.772	-1.53	0.52	2.66	2.66	2.66	0.59 OMR	1.04	7.69
BANK DHOFAR	0.127	0.00	0.00	0.79	0.79	0.79	0.38 QAR	0.54	14.93
NAT BANK OF OMAN	0.215	0.00	2.38	9.14	9.14	9.14	0.35 QAR	0.63	12.71
OMINVEST	0.306	0.00	0.00	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 -0.19 % The leading sector bottom performance indices today are Consumer Disc -0.6 % Financial services -0.59 % Banking -0.28 % respectively

Telecommunication sector are up today by + 0.09 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -3.94 %

KSA

Saudi Armco has a negative performance today by -0.95 %, SABIC has a negative performance today by -1.11 %

STC has negative performance today by -1.97 %, Al Rajhi Bank has a negative performance today by -0.66 %

UAE

ETISALAT AD closed up today by + 3.23 %, and act defensively with COVID19



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NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw