



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, January 25, 2022



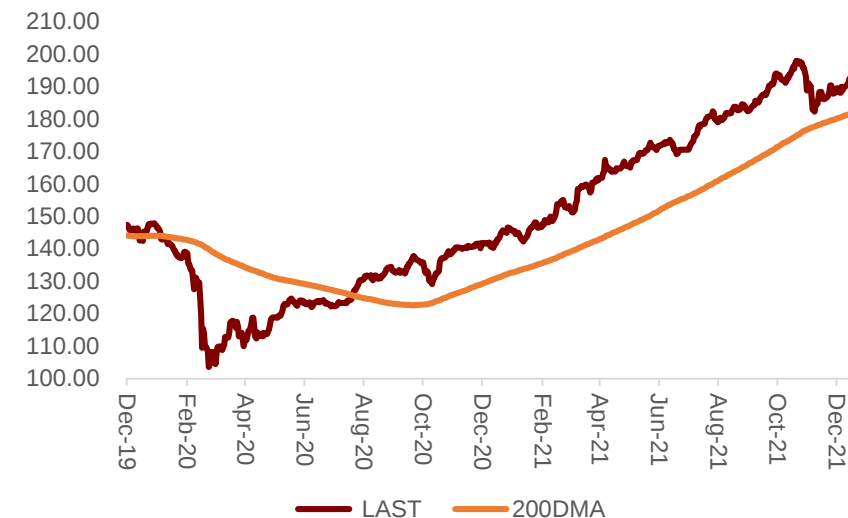


Market Watch

Tuesday, January 25, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	12,108.560	0.33	-1.48	7.33	7.33	7.33	10,388 SAR	2.52	19.32
Qatar (QE Index)	12,548.480	0.20	0.29	7.94	7.94	7.94	637 QAR	1.81	16.81
Dubai (DFMGI)	3,157.230	0.34	-0.37	-1.21	-1.21	-1.21	320 AED	1.61	23.12
Abu Dhabi (ADI)	8,713.870	0.14	0.37	2.66	2.66	2.66	1,435 AED	1.84	16.41
Bahrain (BAX)	1,805.087	-0.26	1.28	0.44	0.44	0.44	18 BHD	1.52	9.98
MUSCAT SE INDEX	4,178.989	-0.55	-1.34	1.20	1.20	1.20	5 OMR	0.89	13.25
SP GCC Comp LMC	202.362	0.29	-0.88	6.65	6.65	6.65			
Developed Markets									
MSCI World Index	2,975.480	-1.00	-3.46	-8.08	-8.08	-8.08			
U.S. (S&P 500)	4,356.450	-1.22	-2.82	-8.84	-8.84	-8.84			
U.K. (FTSE 100)	7,371.460	1.02	-2.82	-0.43	-0.43	-0.43			
Japan (Topix)	1,896.620	-1.72	-2.16	-4.80	-4.80	-4.80			
Emerging Markets									
MSCI EM Index	1,210.451	-0.96	-3.61	-1.01	-1.01	-1.01			
China (SSE Composite)	3,433.061	-2.58	-3.43	-5.14	-5.14	-5.14			
India (Sensex)	57,858.150	0.64	-2.70	0.11	0.11	0.11			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,317.03	-0.25	-0.64	3.89	3.89	3.89	43.54 KWD	2.21	28.16
Kuwait Premier Index	7,989.41	-0.13	-0.48	4.59	4.59	4.59	32.74 KWD	2.35	28.23
Kuwait Main Index	5,990.75	-0.64	-1.15	1.77	1.77	1.77	10.80 KWD	1.75	28.03
NIC 50	8,881.27	-0.24	-0.64	4.21	4.21	4.21	28.60 KWD	2.33	27.23
Kuwait Sector									
Banking	1,703.04	-0.06	-0.55	4.95	4.95	4.95	25.33 KWD	1.35	29.23
Telecom	1,095.55	-0.26	0.15	0.57	0.57	0.57	3.37 KWD	0.93	15.16
Industrials	1,159.16	-0.64	-0.44	1.55	1.55	1.55	4.14 KWD	0.89	14.06
Financial services	1,491.00	-0.78	-1.98	4.76	4.76	4.76	3.90 KWD	0.87	13.70
Real estate	1,350.87	-0.24	-0.83	1.84	1.84	1.84	2.92 KWD	0.75	50.01
Basic materials	1,105.07	-0.07	-0.03	7.83	7.83	7.83	0.99 KWD	1.91	29.57
Health care	811.11	0.00	-0.01	1.77	1.77	1.77	0.40 KWD	6.16	13.01
Consumer services	733.12	-0.28	-0.14	0.27	0.27	0.27	0.74 KWD	0.90	15.45
Insurance	1,502.89	-0.63	-0.85	-1.99	-1.99	-1.99	0.63 KWD	0.80	8.57
Consumer Disc	1,429.00	-0.74	-0.55	6.91	6.91	6.91	0.22 KWD	1.34	8.97
Energy	1,409.93	-2.04	-1.30	-1.28	-1.28	-1.28	0.30 KWD	1.03	15.22
Technology	659.11	-1.52	-3.10	-3.62	-3.62	-3.62	0.01 KWD	0.79	0.00
Utilities	586.84	0.00	-1.33	-2.19	-2.19	-2.19	0.25 KWD	3.99	19.20

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices climbed on Tuesday, regaining some of the ground lost in the previous day's sharp losses, on concerns over possible supply disruptions amid rising geopolitical tensions in both Eastern Europe and the Middle East, Brent crude futures rose 48 cents, or 0.6%, to \$86.75 a barrel.

Kuwait Market

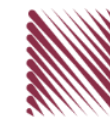
The market closed today down by - 0.25%, closed at 7,317.03 value traded 59.1 million KD, Premier market value traded reached 41.1 million KD and closed at 7,989.41 down by - 0.13%.

Saudi Market

The Market closed up today by + 0.33%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



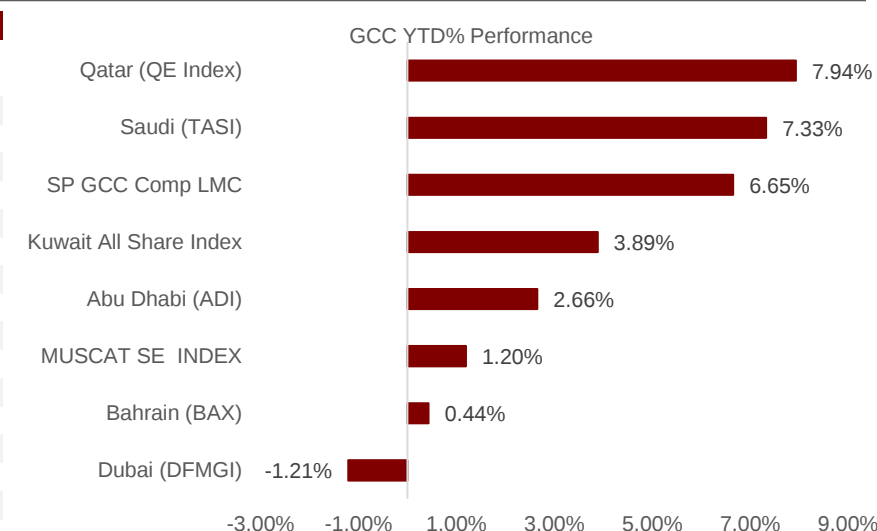
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.048	0.77	-0.19	4.51	4.51	4.51	7.48 KWD	1.93	27.00
KFH	0.902	-0.11	-1.10	8.17	8.17	8.17	7.62 KWD	3.51	32.00
Zain	0.597	-0.17	0.17	0.17	0.17	0.17	2.59 KWD	2.18	13.65
BOUBYAN BANK	0.822	-0.36	-0.97	3.80	3.80	3.80	2.62 KWD	3.74	34.00
Agility	0.982	-0.81	-0.41	3.60	3.60	3.60	2.21 KWD	1.01	2.11
Saudi Arabia									
ARAMCO	36.60	0.83	-0.68	2.23	2.23	2.23	7,300.00 SAR	6.83	22.29
SABIC	124.00	-0.80	-1.90	6.90	6.90	6.90	375.00 SAR	2.16	35.00
STC	120.00	1.01	-1.64	6.76	6.76	6.76	239.20 SAR	3.49	21.60
AL-RAJHI BANK	147.80	0.27	-1.73	4.23	4.23	4.23	373.50 SAR	5.87	27.14
NCB	71.50	-0.14	-3.38	11.02	11.02	11.02	328.69 SAR	2.04	21.46
United Arab Emirates									
ETISALAT.AD	32.20	0.37	0.63	1.58	1.58	1.58	278.30 AED	6.04	30.15
FAB.AD	20.50	0.20	0.99	8.81	8.81	8.81	221.68 AED	2.03	18.24
EMIRATES NBD	13.50	1.89	0.00	-0.37	-0.37	-0.37	85.27 AED	1.00	10.69
DB ISLAMIC BK	5.45	-0.55	-1.27	1.30	1.30	1.30	39.97 AED	1.05	14.72
EMAAR PROPERT	4.71	1.07	-2.48	-3.68	-3.68	-3.68	39.51 AED	0.61	12.54
Qatar									
QNB	21.80	0.00	-0.37	7.58	7.58	7.58	201.35 QAR	2.04	16.45
INDUSTRIES QAT	16.68	-0.12	-0.36	7.04	7.04	7.04	101.04 QAR	2.70	15.16
QA ISLAMIC BK	19.65	2.24	-1.90	6.76	6.76	6.76	45.42 QAR	1.84	13.90
MASRAF AL RAYA	5.09	-0.08	-0.10	9.38	9.38	9.38	47.36 QAR	2.58	17.16
MESAIEED PETRO	2.42	-0.53	-0.62	14.93	14.93	14.93	30.53 QAR	1.83	18.58
OMAN									
BANK MUSCAT	0.524	0.77	-1.14	7.44	7.44	7.44	1.87 OMR	0.89	8.33
OMANTEL	0.768	-1.54	-1.03	2.13	2.13	2.13	0.58 OMR	1.03	7.69
BANK DHOFAR	0.123	0.00	-3.15	-2.38	-2.38	-2.38	0.38 QAR	0.54	14.93
NAT BANK OF OMAN	0.210	-0.94	-2.33	6.60	6.60	6.60	0.35 QAR	0.63	12.71
OMINVEST	0.300	-2.60	-1.96	-1.96	-1.96	-1.96	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 -0.25 % The leading sector bottom performance indices today are Energy -2.04 % Technology -1.52 % Financial services -0.78 % respectively

Telecommunication sector are down today by -0.26 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-3.18 %

KSA

Saudi Armco has a positive performance today by + 0.83 %, SABIC has a negative performance today by - 0.80 %

STC has a positive performance today by + 1.01 %, Al Rajhi Bank has a positive performance today by + 0.27 %

UAE

ETISALAT AD closed up today by + 0.37 %, and act defensively with COVID19



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