



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, June 26, 2022



DAILY MARKETS WRAP,

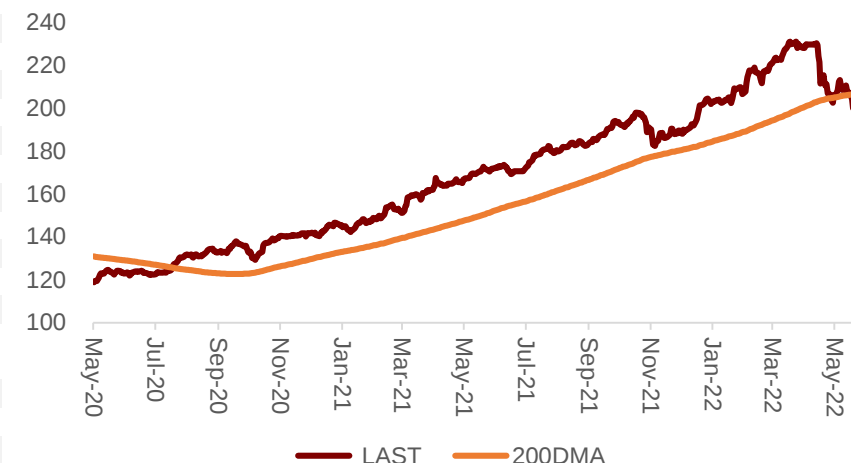
NIC RESEARCH AND STUDIES DEP



Market Watch Sunday, June 26, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,513.01	1.79	-2.63	-10.90	-12.05	2.05	11,196 SAR	1.96	18.12
Qatar (QE Index)	12,129.92	3.20	-3.44	-6.11	-10.37	4.34	612 QAR	1.48	14.48
Dubai (DFMGI)	3,201.90	0.09	-2.39	-4.34	-9.21	0.19	437 AED	1.29	33.46
Abu Dhabi (ADI)	9,238.34	-0.07	-2.80	-8.12	-7.14	8.84	1,435 AED	1.95	20.14
Bahrain (BAX)	1,809.73	-0.36	-2.26	-5.78	-12.72	0.69	18 BHD	1.17	171.33
MUSCAT SE INDEX	4,118.76	0.09	-0.09	0.07	-2.06	-0.26	5 OMR	0.90	13.25
SP GCC Comp LMC	189.54	-0.01	-4.12	-11.03	-14.91	-0.12			
Developed Markets									
MSCI World Index	2,619.48	2.76	5.18	-6.15	-14.20	-18.94			
U.S. (S&P 500)	3,911.74	3.06	6.68	-5.33	-13.66	-17.93			
U.K. (FTSE 100)	7,208.81	2.68	2.33	-5.24	-4.08	-2.38			
Japan (Topix)	1,866.72	0.81	-0.06	-2.40	-4.09	-6.30			
Emerging Markets									
MSCI EM Index	1,011.18	1.59	0.30	-6.17	-11.44	-17.92			
China (SSE Composite)	3,349.75	0.89	1.96	5.13	3.00	-7.97			
India (Sensex)	52,727.98	0.88	2.39	-5.11	-9.97	-9.49			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,328.98	1.23	-1.14	-6.32	-10.04	4.06	43.78 KWD	2.40	21.86
Kuwait Permier Index	8,124.65	1.33	-1.14	-6.35	-10.34	6.36	33.50 KWD	2.55	23.90
Kuwait Main Index	5,694.38	0.85	-1.17	-6.21	-8.96	-3.26	10.28 KWD	1.88	15.25
NIC 50	9,114.82	1.31	-1.15	-6.36	-10.35	6.95	28.60 KWD	2.53	22.90
Kuwait Sector									
Banking	1,745.94	1.21	-0.05	-4.40	-9.55	7.59	26.11 KWD	1.33	24.90
Telecom	1,210.58	0.67	-2.79	-6.47	-4.09	11.13	3.71 KWD	0.87	13.71
Industrials	1,182.40	1.63	-4.83	-10.58	-8.69	3.58	4.21 KWD	0.94	10.87
Financial services	1,368.05	1.63	-1.82	-11.14	-17.63	-3.88	3.54 KWD	0.78	17.58
Real estate	1,206.59	1.82	-2.24	-8.60	-13.52	-9.03	2.61 KWD	0.63	22.82
Basic materials	1,020.41	1.64	-2.01	-15.41	-12.17	-0.43	0.91 KWD	1.47	9.73
Health care	471.33	0.06	-1.83	-1.83	-4.79	-40.86	0.23 KWD	2.87	13.07
Consumer services	517.81	1.34	-7.75	-20.58	-27.25	-29.17	0.77 KWD	0.87	32.47
Insurance	1,534.11	-0.74	0.23	2.06	-5.37	0.05	0.64 KWD	0.76	8.55
Consumer Disc	1,484.78	0.45	-1.25	-6.31	-3.77	11.08	0.16 KWD	0.98	9.99
Energy	1,159.52	0.63	1.94	-0.62	-10.72	-18.81	0.24 KWD	0.79	15.34
Technology	640.20	0.00	-2.22	-4.35	-5.38	-6.38	0.01 KWD	0.77	0.00
Utilities	534.21	0.49	-1.93	-5.58	-8.97	-10.97	0.22 KWD	2.55	15.65

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices settled up by more than \$3 a barrel on Friday, supported by tight supply, but they notched their second weekly decline on concern that rising interest rates could push the world economy into recession, Brent crude settled up \$3.07, or 2.8%, at \$113.12 a barrel.

Kuwait Market

The market closed up today by +1.23%, closed at 7,328.98 value traded 54.7 million KD, Premier market value traded reached 38.6 million KD and closed at 8,124.65 up by +1.33%.

Saudi Market

The Market closed up today by + 1.79%, 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.

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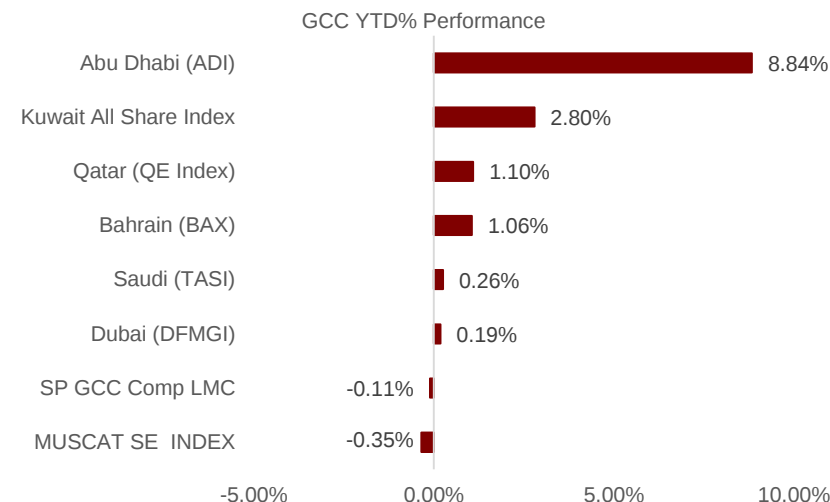
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.030	-0.10	-0.48	-0.77	-6.28	8.48	7.78 KWD	2.03	27.00
KFH	0.835	2.58	0.60	-7.12	-14.24	10.40	7.76 KWD	4.07	32.00
Zain	0.597	0.67	-2.77	-5.24	-4.94	0.34	2.58 KWD	2.28	13.71
BOUBYAN BANK	0.778	2.23	-1.14	-4.19	-8.12	9.21	2.91 KWD	3.85	34.00
Agility	0.819	0.86	-9.67	-14.39	-11.06	4.00	2.19 KWD	0.95	2.12
Saudi Arabia									
ARAMCO	37.65	1.21	-2.21	-10.14	-3.91	15.68	8,283.00 SAR	6.91	18.35
SABIC	101.60	1.20	-1.55	-11.34	-22.44	-12.41	304.80 SAR	1.62	35.00
STC	99.00	2.06	-2.75	-3.70	-8.16	-11.92	198.00 SAR	2.81	17.01
AL-RAJHI BANK	84.60	1.93	-1.86	-14.46	-15.72	-4.54	338.40 SAR	4.32	23.72
NCB	63.90	0.79	-3.62	-11.74	-9.87	-0.78	286.14 SAR	1.72	18.99
United Arab Emirates									
ETISALAT.AD	27.10	0.37	-1.45	-10.68	-26.68	-14.51	235.68 AED	4.82	25.07
FAB.AD	18.42	-0.32	-4.16	-14.25	-21.95	-1.09	203.50 AED	1.83	13.72
EMIRATES NBD	13.00	-1.89	-4.06	-1.14	-13.33	-4.06	82.12 AED	1.01	8.96
DB ISLAMIC BK	5.74	1.06	1.59	-3.53	-6.97	6.69	41.56 AED	1.09	9.38
EMAAR PROPERT	5.15	1.38	-5.68	-9.81	-14.17	5.32	42.13 AED	0.66	6.95
Qatar									
QNB	19.74	-0.10	-0.45	-8.40	-14.43	-2.23	183.23 QAR	1.88	14.57
INDUSTRIES QAT	15.69	7.84	-6.05	-14.22	-17.42	1.29	95.39 QAR	2.63	10.18
QA ISLAMIC BK	22.25	0.77	1.64	-3.89	-6.67	21.39	52.84 QAR	2.16	15.18
MASRAF AL RAYA	4.19	4.15	-8.98	-10.89	-18.99	-9.74	39.14 QAR	1.26	19.05
MESAIEED PETRO	2.51	4.58	-8.36	-7.38	-13.75	20.10	31.69 QAR	1.96	16.37
OMAN									
BANK MUSCAT	0.524	-0.38	-1.87	0.00	2.75	13.68	1.96 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	0.00	-0.86	0.88	0.00	-8.73	0.34 QAR	0.49	14.93
NAT BANK OF OMAN	0.210	0.96	1.45	2.44	2.44	6.60	0.34 QAR	0.61	12.71
OMINVEST	0.308	1.32	0.65	0.00	-8.88	0.65	0.21 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 + 1.23 %The leading sector best performance indices today are Real estate 1.82 % Basic materials 1.64 % Industrials 1.63 % respectively

Telecommunication sector are up today by + 0.67 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 7.07 %

KSA

Saudi Armco has a positive performance today by + 1.21 %, SABIC has a positive performance today by + 1.19 %

STC has a positive performance today by + 2.06 %, Al Rajhi Bank has a positive performance today by + 1.93 %

UAE

ETISALAT .AD has a positive performance today by + 0.37 %, FAB.AD has a negative performance today by -0.32 %



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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