



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, January 26, 2022



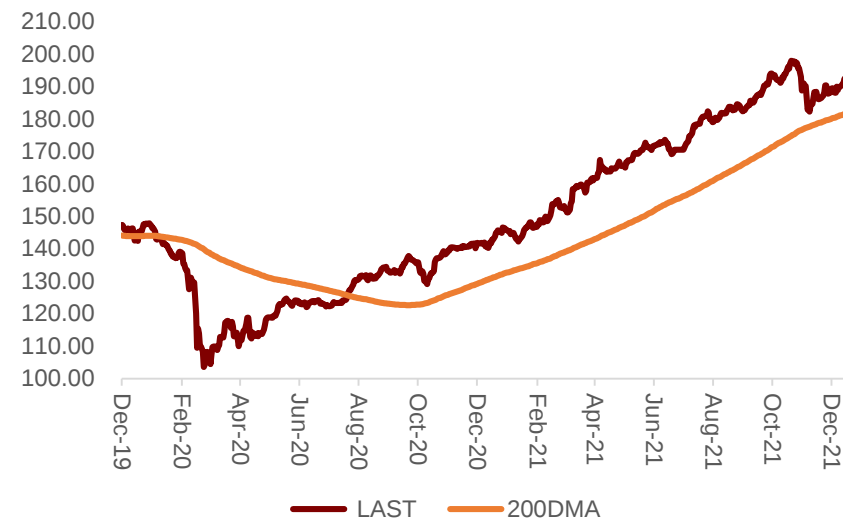


Market Watch

Wednesday, January 26, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	12,182.510	0.61	-0.88	7.98	7.98	7.98	10,398 SAR	2.51	19.08
Qatar (QE Index)	12,481.330	-0.54	-0.24	7.36	7.36	7.36	635 QAR	1.76	16.77
Dubai (DFMGI)	3,172.820	0.49	0.12	-0.72	-0.72	-0.72	315 AED	1.57	22.55
Abu Dhabi (ADI)	8,718.230	0.05	0.42	2.71	2.71	2.71	1,435 AED	1.80	15.92
Bahrain (BAX)	1,812.010	0.38	1.67	0.82	0.82	0.82	18 BHD	1.52	9.96
MUSCAT SE INDEX	4,167.029	-0.29	-1.62	0.91	0.91	0.91	5 OMR	0.88	13.25
SP GCC Comp LMC	202.915	0.27	-0.60	6.95	6.95	6.95			
Developed Markets									
MSCI World Index	2,979.700	0.14	-3.33	-7.95	-7.95	-7.95			
U.S. (S&P 500)	4,349.930	-0.15	-2.96	-8.97	-8.97	-8.97			
U.K. (FTSE 100)	7,469.780	1.33	-1.52	0.90	0.90	0.90			
Japan (Topix)	1,891.850	-0.25	-2.41	-5.04	-5.04	-5.04			
Emerging Markets									
MSCI EM Index	1,211.447	0.08	-3.53	-0.92	-0.92	-0.92			
China (SSE Composite)	3,455.668	0.66	-2.80	-4.52	-4.52	-4.52			
India (Sensex)	57,858.15	0.64	-2.00	-0.68	-0.68	-0.68			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,312.59	-0.06	-0.70	3.83	3.83	3.83	43.40 KWD	2.20	28.06
Kuwait Premier Index	7,972.35	-0.21	-0.69	4.36	4.36	4.36	32.62 KWD	2.34	28.12
Kuwait Main Index	6,015.67	0.42	-0.74	2.20	2.20	2.20	10.78 KWD	1.74	27.99
NIC 50	8,869.16	-0.14	-0.78	4.07	4.07	4.07	28.60 KWD	2.32	27.12
Kuwait Sector									
Banking	1,696.94	-0.36	-0.91	4.57	4.57	4.57	25.21 KWD	1.33	29.12
Telecom	1,096.26	0.06	0.22	0.63	0.63	0.63	3.36 KWD	0.93	15.16
Industrials	1,161.04	0.16	-0.28	1.71	1.71	1.71	4.11 KWD	0.89	13.90
Financial services	1,504.52	0.91	-1.09	5.71	5.71	5.71	3.91 KWD	0.86	13.18
Real estate	1,353.21	0.17	-0.66	2.02	2.02	2.02	2.92 KWD	0.75	47.81
Basic materials	1,109.95	0.44	0.41	8.31	8.31	8.31	0.99 KWD	1.89	29.62
Health care	806.88	-0.52	-0.53	1.24	1.24	1.24	0.40 KWD	6.16	13.01
Consumer services	731.07	-0.28	-0.42	-0.01	-0.01	-0.01	0.74 KWD	0.88	15.33
Insurance	1,503.72	0.06	-0.79	-1.93	-1.93	-1.93	0.63 KWD	0.79	8.49
Consumer Disc	1,435.67	0.47	-0.09	7.41	7.41	7.41	0.22 KWD	1.34	8.96
Energy	1,436.37	1.88	0.55	0.58	0.58	0.58	0.30 KWD	1.04	15.13
Technology	676.58	2.65	-0.53	-1.06	-1.06	-1.06	0.01 KWD	0.80	0.00
Utilities	589.47	0.00	-0.89	-1.75	-1.75	-1.75	0.25 KWD	3.97	18.95

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices eased on Wednesday as investors booked profits ahead of an update from the U.S. Federal Reserve, although fears over tighter supply amid tensions in Ukraine and the Middle East capped losses, Brent crude futures were down 15 cents, or 0.2%, at \$88.05 a barrel.

Kuwait Market

The market closed today down by - 0.06%, closed at 7,312.59 value traded 44.8 million KD, Premier market value traded reached 24.6 million KD and closed at 7,972.35 down by - 0.21%.

Saudi Market

The Market closed up today by + 0.61%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



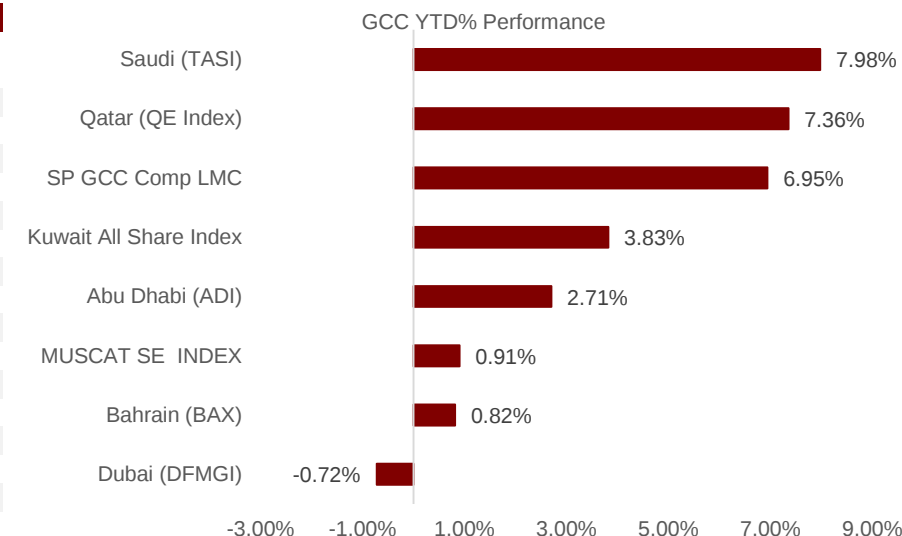
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.038	-0.95	-0.57	4.11	4.11	4.11	7.47 KWD	1.92	27.00
KFH	0.900	-0.22	-1.10	8.17	8.17	8.17	7.60 KWD	3.50	32.00
Zain	0.597	0.00	0.34	0.34	0.34	0.34	2.58 KWD	2.17	13.67
BOUBYAN BANK	0.814	-0.97	-1.69	3.04	3.04	3.04	2.59 KWD	3.69	34.00
Agility	0.983	0.10	0.00	4.02	4.02	4.02	2.19 KWD	1.00	2.09
Saudi Arabia									
ARAMCO	36.90	0.82	0.14	3.07	3.07	3.07	7,320.00 SAR	6.85	21.96
SABIC	124.00	0.00	-1.90	6.90	6.90	6.90	372.00 SAR	2.14	35.00
STC	119.00	-0.83	-2.46	5.87	5.87	5.87	240.00 SAR	3.50	21.03
AL-RAJHI BANK	148.80	0.68	-1.06	4.94	4.94	4.94	369.50 SAR	5.81	26.60
NCB	72.00	0.70	-2.70	11.80	11.80	11.80	320.18 SAR	1.99	20.77
United Arab Emirates									
ETISALAT.AD	32.06	-0.43	0.19	1.14	1.14	1.14	280.04 AED	6.08	30.34
FAB.AD	20.60	0.49	1.48	9.34	9.34	9.34	223.86 AED	2.05	18.42
EMIRATES NBD	13.50	0.00	0.00	-0.37	-0.37	-0.37	85.27 AED	1.00	10.69
DB ISLAMIC BK	5.48	0.55	-0.72	1.86	1.86	1.86	39.46 AED	1.03	14.53
EMAAR PROPERT	4.78	1.49	-1.04	-2.25	-2.25	-2.25	38.53 AED	0.59	12.22
Qatar									
QNB	21.83	0.14	0.14	8.12	8.12	8.12	201.63 QAR	2.04	16.49
INDUSTRIES QAT	16.67	-0.06	0.30	7.75	7.75	7.75	100.85 QAR	2.70	15.15
QA ISLAMIC BK	19.40	-1.27	-2.76	5.84	5.84	5.84	45.84 QAR	1.85	13.82
MASRAF AL RAYA	5.05	-0.77	-0.59	8.84	8.84	8.84	46.97 QAR	2.55	17.14
MESAIEED PETRO	2.40	-0.87	-0.87	14.64	14.64	14.64	30.10 QAR	1.80	18.52
OMAN									
BANK MUSCAT	0.520	-0.38	-0.38	8.26	8.26	8.26	1.87 OMR	0.89	8.33
OMANTEL	0.784	1.55	0.52	3.72	3.72	3.72	0.59 OMR	1.04	7.69
BANK DHOFAR	0.122	-0.81	-3.94	-3.17	-3.17	-3.17	0.37 QAR	0.52	14.93
NAT BANK OF OMAN	0.210	0.00	-2.79	6.09	6.09	6.09	0.34 QAR	0.62	12.71
OMINVEST	0.310	2.65	-1.96	-1.96	-1.96	-1.96	0.24 QAR	0.88	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
19-Jan-22	20.95%	12.50%	0.06%	0.46%	0.39%	5.15%	2.63%	10.41%	5.26%	4.34%
26-Jan-22	20.98%	12.42%	0.06%	0.46%	0.39%	5.26%	2.66%	10.40%	5.30%	4.28%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.06 % The leading sector bottom performance indices today are Health care -0.52 % Banking -0.36 % Consumer services -0.28 % respectively

Telecommunication sector are up today by + 0.06 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by -3.2 %

KSA

Saudi Armco has a positive performance today by + 0.82%, SABIC has a flat performance today

STC have negative performance today by - 0.83%, Al Rajhi Bank has a positive performance today by + 0.68 %

UAE

ETISALAT AD closed down today by - 0.43 %, and act defensively with COVID19



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