



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, June 28, 2022



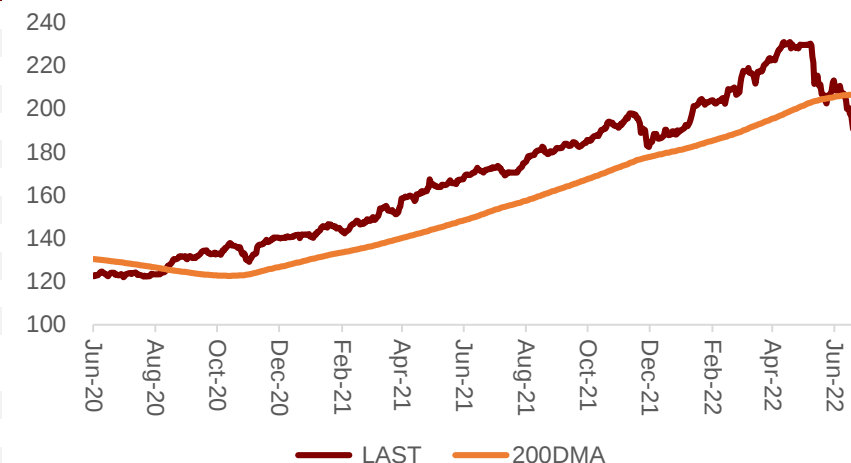


Market Watch Tuesday, June 28, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,671.15	2.13	-1.30	-9.68	-10.84	3.45	11,496 SAR	2.01	18.68
Qatar (QE Index)	12,291.84	1.12	-2.15	-4.86	-9.17	5.73	619 QAR	1.51	14.92
Dubai (DFMGI)	3,252.71	1.09	-0.84	-2.82	-7.77	1.78	442 AED	1.34	34.14
Abu Dhabi (ADI)	9,442.91	1.89	-0.65	-6.09	-5.08	11.25	1,435 AED	1.98	20.23
Bahrain (BAX)	1,806.28	-0.25	-2.45	-5.96	-12.89	0.50	18 BHD	1.17	171.28
MUSCAT SE INDEX	4,127.89	0.27	0.13	0.29	-1.84	-0.04	5 OMR	0.91	13.25
SP GCC Comp LMC	195.05	1.68	-1.34	-8.44	-12.43	2.80			
Developed Markets									
MSCI World Index	2,584.26	-1.48	3.76	-7.41	-15.36	-20.03			
U.S. (S&P 500)	3,821.55	-2.01	4.22	-7.52	-15.65	-19.82			
U.K. (FTSE 100)	7,323.41	0.90	3.95	-3.74	-2.56	-0.83			
Japan (Topix)	1,907.38	1.06	2.12	-0.28	-2.00	-4.26			
Emerging Markets									
MSCI EM Index	1,030.07	0.25	2.18	-4.42	-9.78	-16.39			
China (SSE Composite)	3,409.21	0.89	3.77	6.99	4.83	-6.33			
India (Sensex)	53,177.45	0.03	3.27	-4.30	-9.20	-8.71			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,331.73	0.00	-1.11	-6.29	-10.00	4.10	43.82 KWD	2.40	21.94
Kuwait Premier Index	8,147.80	0.20	-0.85	-6.09	-10.08	6.66	33.61 KWD	2.56	24.00
Kuwait Main Index	5,646.39	-0.71	-2.00	-7.00	-9.73	-4.08	10.20 KWD	1.84	15.19
NIC 50	9,133.33	0.16	-0.86	-6.10	-10.09	7.17	28.60 KWD	2.54	23.00
Kuwait Sector									
Banking	1,756.66	0.32	0.56	-3.81	-8.99	8.25	26.27 KWD	1.32	25.00
Telecom	1,204.75	-0.21	-3.26	-6.92	-4.55	10.59	3.70 KWD	0.85	13.71
Industrials	1,169.29	-0.55	-5.89	-11.57	-9.70	2.44	4.16 KWD	0.94	10.76
Financial services	1,351.08	-0.44	-3.04	-12.24	-18.65	-5.08	3.51 KWD	0.77	16.95
Real estate	1,192.62	-0.99	-3.37	-9.66	-14.52	-10.09	2.58 KWD	0.63	22.48
Basic materials	1,015.45	-0.61	-2.49	-15.82	-12.59	-0.91	0.91 KWD	1.47	9.75
Health care	479.40	-2.66	-0.15	-0.15	-3.16	-39.85	0.24 KWD	2.94	13.07
Consumer services	525.66	0.58	-6.35	-19.38	-26.15	-28.10	0.75 KWD	0.87	34.49
Insurance	1,541.50	0.19	0.71	2.56	-4.92	0.53	0.64 KWD	0.76	8.62
Consumer Disc	1,461.50	-0.86	-2.79	-7.78	-5.28	9.34	0.16 KWD	0.98	10.26
Energy	1,195.03	2.45	5.06	2.43	-7.99	-16.32	0.25 KWD	0.80	15.89
Technology	609.64	-4.77	-6.89	-8.91	-9.89	-10.85	0.01 KWD	0.73	0.00
Utilities	539.47	0.98	-0.97	-4.65	-8.07	-10.09	0.23 KWD	2.58	15.81

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices rallied for a third day on Tuesday as major producers Saudi Arabia and the United Arab Emirates looked unlikely to be able to boost output significantly while political unrest in Libya and Ecuador added to those supply concerns. Brent crude futures advanced \$2.22 to \$117.31 a barrel, adding to a 1.7% rise in the previous session.

Kuwait Market

The market closed flat today at 7,331.73 value traded 38.9 million KD, Premier market value traded reached 26.6 million KD and closed at 8,147.80 up by +0.20%.

Saudi Market

The Market closed up today by + 2.13%, 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.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



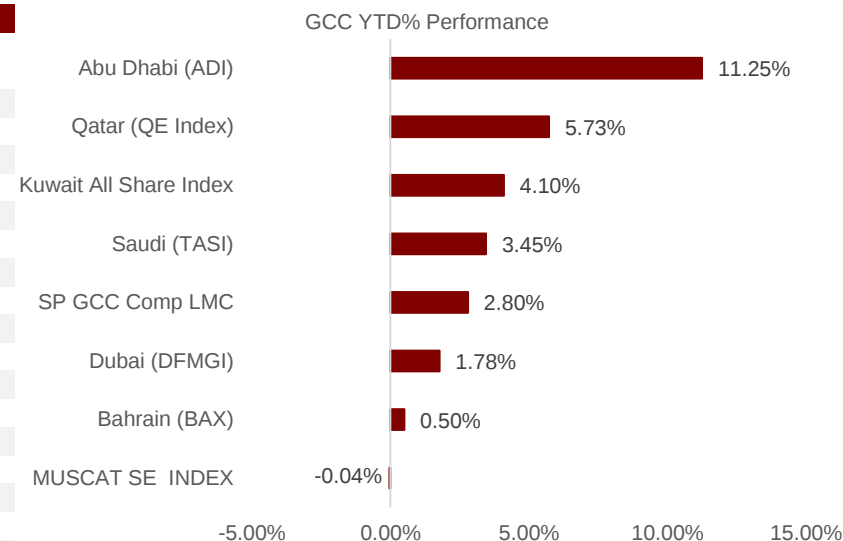
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.045	0.87	0.97	0.67	-4.91	10.06	7.90 KWD	2.06	27.00
KFH	0.840	0.12	1.20	-6.56	-13.73	11.06	7.81 KWD	4.09	32.00
Zain	0.597	0.00	-2.77	-5.24	-4.94	0.34	2.59 KWD	2.28	13.71
BOUBYAN BANK	0.778	0.00	-1.14	-4.19	-8.12	9.21	2.91 KWD	3.85	34.00
Agility	0.812	-0.12	-10.44	-15.12	-11.82	3.11	2.17 KWD	0.94	2.11
Saudi Arabia									
ARAMCO	38.85	3.32	0.91	-7.28	-0.85	19.37	8,546.54 SAR	7.13	18.55
SABIC	104.60	3.36	1.36	-8.73	-20.15	-9.83	313.78 SAR	1.67	35.00
STC	99.00	2.06	-2.75	-3.70	-8.16	-11.92	197.99 SAR	2.81	17.01
AL-RAJHI BANK	85.00	0.95	-1.39	-14.05	-15.32	-4.09	339.98 SAR	4.34	24.07
NCB	66.40	3.43	0.15	-8.29	-6.35	3.11	297.32 SAR	1.79	19.23
United Arab Emirates									
ETISALAT.AD	27.40	1.48	-0.36	-9.69	-25.87	-13.56	238.31 AED	4.87	25.35
FAB.AD	18.90	2.61	-1.66	-12.01	-19.92	1.49	208.81 AED	1.88	14.08
EMIRATES NBD	13.60	1.87	0.37	3.42	-9.33	0.37	85.91 AED	1.05	9.37
DB ISLAMIC BK	5.75	1.59	1.77	-3.36	-6.81	6.88	41.64 AED	1.09	9.40
EMAAR PROPERT	5.24	1.35	-4.03	-8.23	-12.67	7.16	42.86 AED	0.68	7.07
Qatar									
QNB	20.47	2.35	3.23	-5.01	-11.27	1.39	189.07 QAR	1.95	15.11
INDUSTRIES QAT	16.12	2.03	-3.47	-11.86	-15.16	4.07	97.53 QAR	2.70	10.45
QA ISLAMIC BK	22.20	1.05	1.42	-4.10	-6.88	21.11	52.46 QAR	2.16	15.14
MASRAF AL RAYA	4.16	0.22	-9.69	-11.60	-19.63	-10.45	38.64 QAR	1.25	18.90
MESAIED PETRO	2.53	0.80	-7.63	-6.64	-13.06	21.05	31.78 QAR	1.97	16.50
OMAN									
BANK MUSCAT	0.524	0.00	-1.87	0.00	2.75	13.68	1.97 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	0.00	1.45	2.44	2.44	6.60	0.34 QAR	0.61	12.71
OMINVEST	0.304	-0.65	-0.65	-1.30	-10.06	-0.65	0.20 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, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by 0 %The leading sector bottom performance indices today are Technology -4.77 % Health care -2.66 % Real estate -0.99 % respectively

Telecommunication sector are down today by -0.21 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 6.49 %

KSA

Saudi Armco has a positive performance today by + 3.32 %, SABIC have positive performance today by + 3.35 %

STC has a positive performance today by + 2.06 %, Al Rajhi Bank has a positive performance today by + 0.95 %

UAE

ETISALAT .AD has a positive performance today by + 1.48 %, FAB.AD has a positive performance today by + 2.61 %



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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