



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

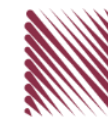
GCC DAILY MORNING BRIEF

Wednesday, June 29, 2022



DAILY MARKETS WRAP,

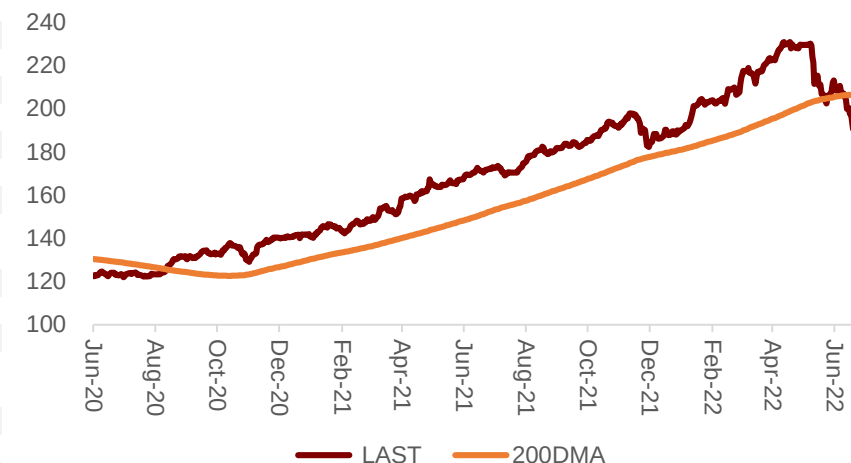
NIC RESEARCH AND STUDIES DEP



Market Watch Wednesday, June 29, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	11,727.19	0.48	3.68	-9.24	-10.41	3.95	11,584 SAR	2.02	18.62
Qatar (QE Index)	12,237.04	-0.45	4.11	-5.28	-9.58	5.26	619 QAR	1.51	14.86
Dubai (DFMGI)	3,245.84	-0.21	1.47	-3.03	-7.96	1.56	441 AED	1.31	33.67
Abu Dhabi (ADI)	9,408.02	-0.37	1.77	-6.43	-5.44	10.83	1,435 AED	1.99	20.28
Bahrain (BAX)	1,825.44	1.06	0.50	-4.96	-11.96	1.57	18 BHD	1.17	171.28
MUSCAT SE INDEX	4,125.10	-0.07	0.24	0.22	-1.90	-0.11	5 OMR	0.90	13.25
SP GCC Comp LMC	195.31	0.14	3.03	-8.32	-12.32	2.94			
SP UAE PRICE INDEX	142.40	-0.75	1.15	-8.56	-17.20	-3.44			
Developed Markets									
MSCI World Index	2,574.45	-0.38	1.00	-7.76	-15.68	-20.34			
U.S. (S&P 500)	3,818.83	-0.07	0.61	-7.58	-15.71	-19.88			
U.K. (FTSE 100)	7,312.32	-0.15	4.16	-3.88	-2.71	-0.98			
Japan (Topix)	1,893.57	-0.72	2.26	-1.00	-2.71	-4.96			
Emerging Markets									
MSCI EM Index	1,013.20	-1.64	1.80	-5.98	-11.26	-17.76			
China (SSE Composite)	3,361.52	-1.40	1.25	5.49	3.36	-7.64			
India (Sensex)	53,026.97	-0.28	1.46	-4.57	-9.46	-8.97			
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	7,397.47	0.90	2.17	-5.45	-9.20	5.03	44.13 KWD	2.43	22.19
Kuwait Premier Index	8,228.90	1.00	2.63	-5.15	-9.19	7.72	33.88 KWD	2.60	24.28
Kuwait Main Index	5,676.97	0.54	0.54	-6.49	-9.24	-3.56	10.25 KWD	1.86	15.30
NIC 50	9,217.97	0.93	2.62	-5.16	-9.20	8.16	28.60 KWD	2.58	23.28
Kuwait Sector									
Banking	1,777.17	1.17	3.02	-2.69	-7.93	9.51	26.52 KWD	1.32	25.28
Telecom	1,211.51	0.56	0.74	-6.39	-4.01	11.21	3.71 KWD	0.88	13.71
Industrials	1,166.63	-0.23	0.28	-11.77	-9.91	2.20	4.15 KWD	0.94	10.74
Financial services	1,368.25	1.27	1.65	-11.12	-17.62	-3.87	3.55 KWD	0.76	17.15
Real estate	1,202.09	0.79	1.44	-8.94	-13.84	-9.37	2.59 KWD	0.63	22.68
Basic materials	1,017.84	0.24	1.39	-15.62	-12.39	-0.68	0.91 KWD	1.47	9.77
Health care	477.88	-0.32	1.45	-0.46	-3.46	-40.04	0.24 KWD	2.94	12.95
Consumer services	532.55	1.31	4.23	-18.32	-25.18	-27.16	0.76 KWD	0.87	33.94
Insurance	1,543.41	0.12	-0.14	2.68	-4.80	0.65	0.64 KWD	0.76	8.55
Consumer Disc	1,474.81	0.91	-0.22	-6.94	-4.42	10.34	0.16 KWD	1.00	10.31
Energy	1,155.28	-3.33	0.26	-0.98	-11.05	-19.11	0.24 KWD	0.81	14.95
Technology	646.75	6.09	1.02	-3.37	-4.41	-5.43	0.01 KWD	0.77	0.00
Utilities	536.84	-0.49	0.99	-5.12	-8.52	-10.53	0.22 KWD	2.57	15.73

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Overnight in the U.S., stocks fluctuated on Wednesday after the major averages made a failed attempt at a bounce in the previous session, and as the market prepares to close out the worst first half of the year since 1970. ,Brent crude futures were slightly up at \$116.34 per barrel.

Kuwait Market

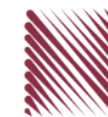
The market closed up today by +0.90% at 7,397.47 value traded 65.5 million KD, Premier market value traded reached 52.2 million KD and closed at 8,228.90 up by +1.0%.

Saudi Market

The Market closed up today by + 0.48%, 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,

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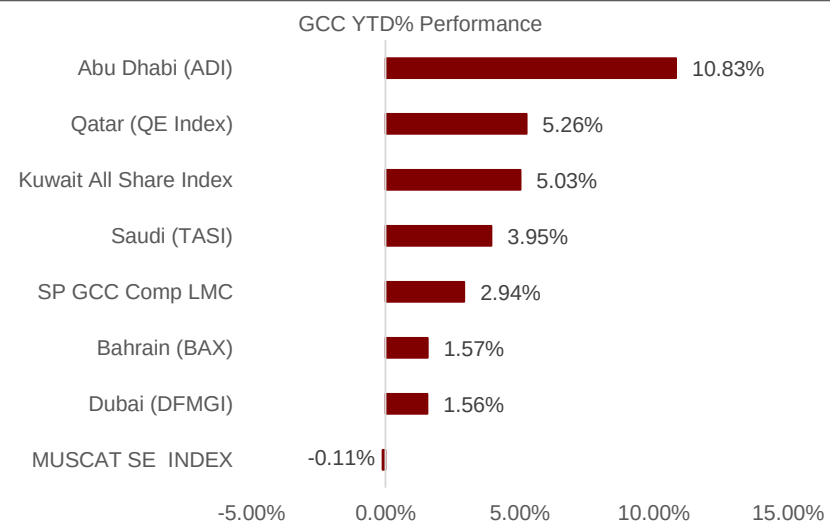
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.045	0.00	1.36	0.67	-4.91	10.06	7.88 KWD	2.06	27.00
KFH	0.865	2.98	6.27	-3.78	-11.16	14.36	8.02 KWD	4.21	32.00
Zain	0.597	0.00	0.67	-5.24	-4.94	0.34	2.58 KWD	2.28	13.71
BOUBYAN BANK	0.780	0.26	2.50	-3.94	-7.88	9.50	2.91 KWD	3.86	34.00
Agility	0.811	-0.12	-0.12	-15.23	-11.93	2.98	2.17 KWD	0.94	2.11
Saudi Arabia									
ARAMCO	39.20	0.90	5.38	-6.44	0.05	20.45	8,621.47 SAR	7.20	19.17
SABIC	105.20	0.57	4.78	-8.20	-19.69	-9.31	315.51 SAR	1.68	35.00
STC	99.60	0.61	2.68	-3.11	-7.61	-11.39	199.14 SAR	2.83	17.36
AL-RAJHI BANK	84.70	-0.35	2.05	-14.36	-15.62	-4.43	338.70 SAR	4.32	24.30
NCB	68.30	2.86	7.73	-5.66	-3.67	6.06	305.76 SAR	1.84	19.89
United Arab Emirates									
ETISALAT.AD	26.86	-1.97	-0.52	-11.47	-27.33	-15.27	233.58 AED	4.77	24.85
FAB.AD	18.60	-1.59	0.65	-13.41	-21.19	-0.12	205.47 AED	1.85	13.85
EMIRATES NBD	13.40	-1.47	1.13	1.90	-10.67	-1.11	84.64 AED	1.04	9.23
DB ISLAMIC BK	5.76	0.17	1.41	-3.19	-6.65	7.06	41.70 AED	1.09	9.41
EMAAR PROPERT	5.27	0.57	3.74	-7.71	-12.17	7.77	43.10 AED	0.68	7.11
Qatar									
QNB	20.11	-1.76	1.77	-6.68	-12.83	-0.40	187.16 QAR	1.92	14.84
INDUSTRIES QAT	16.01	-0.68	10.03	-12.47	-15.74	3.36	97.60 QAR	2.68	10.38
QA ISLAMIC BK	22.34	0.63	1.18	-3.50	-6.29	21.88	53.19 QAR	2.17	15.24
MASRAF AL RAYA	4.15	-0.22	3.11	-11.79	-19.81	-10.65	38.85 QAR	1.24	18.86
MESAIEED PETRO	2.50	-1.15	4.21	-7.71	-14.05	19.67	31.66 QAR	1.95	16.31
OMAN									
BANK MUSCAT	0.526	0.38	0.00	0.38	3.14	14.11	1.97 OMR	0.94	8.33
OMANTEL	0.872	-1.80	0.46	0.93	-0.46	15.96	0.65 OMR	1.17	7.69
BANK DHOFAR	0.118	2.61	2.61	3.51	2.61	-6.35	0.35 QAR	0.51	14.93
NAT BANK OF OMAN	0.208	-0.95	0.00	1.46	1.46	5.58	0.34 QAR	0.60	12.71
OMINVEST	0.304	0.00	0.00	-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
22-June- 22	23.05%	15.83%	0.06%	1.07%	0.41%	6.37%	17.58%	11.37%	5.70%	3.99%
29-June- 22	23.28%	15.93%	0.06%	1.09%	0.41%	6.26%	17.50%	11.40%	5.73%	3.99%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.9 %The leading sector best performance indices today are Energy -3.33 % Health care -0.32 % Industrials -0.23 % respectively

Telecommunication sector are up today by + 0.56 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 6.18 %

KSA

Saudi Armco has a positive performance today by + 0.9 %, SABIC has a positive performance today by + 0.57 %

STC has a positive performance today by + 0.61 %, Al Rajhi Bank has a negative performance today by -0.35 %

UAE

ETISALAT .AD has a negative performance today by -1.97 %, FAB.AD has a negative performance today by -1.59 %



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