

شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Thursday, January 27, 2022



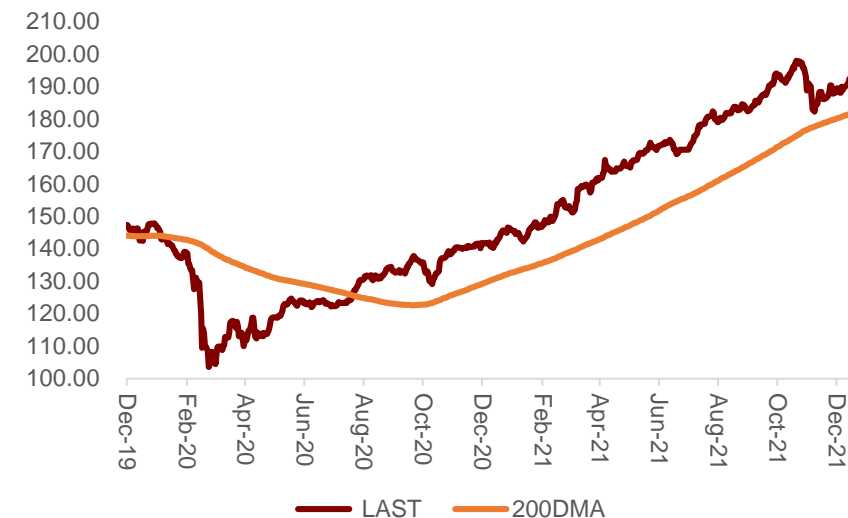


### Market Watch

Thursday, January 27, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>									
		%	%	%	%	%			
Saudi (TASI)	12,179.320	-0.03	-0.91	7.96	7.96	7.96	10,398 SAR	2.51	19.08
Qatar (QE Index)	12,508.640	0.22	-0.03	7.59	7.59	7.59	635 QAR	1.76	16.77
Dubai (DFMGI)	3,188.300	0.49	0.61	-0.24	-0.24	-0.24	315 AED	1.57	22.55
Abu Dhabi (ADI)	8,733.830	0.18	0.60	2.89	2.89	2.89	1,435 AED	1.80	15.92
Bahrain (BAX)	1,807.575	-0.24	1.42	0.57	0.57	0.57	18 BHD	1.52	9.96
MUSCAT SE INDEX	4,170.850	0.09	-1.53	1.00	1.00	1.00	5 OMR	0.88	13.25
SP GCC Comp LMC	202.870	-0.02	-0.63	6.92	6.92	6.92			
<b>Developed Markets</b>									
MSCI World Index	2,955.340	-0.82	-4.12	-8.70	-8.70	-8.70			
U.S. (S&P 500)	4,326.510	-0.54	-3.48	-9.46	-9.46	-9.46			
U.K. (FTSE 100)	7,554.310	1.13	-0.40	2.04	2.04	2.04			
Japan (Topix)	1,842.440	-2.61	-4.96	-7.52	-7.52	-7.52			
<b>Emerging Markets</b>									
MSCI EM Index	1,192.061	-1.60	-5.07	-2.51	-2.51	-2.51			
China (SSE Composite)	3,394.247	-1.78	-4.52	-6.22	-6.22	-6.22			
India (Sensex)	57,276.940	-1.00	-3.68	-0.90	-0.90	-0.90			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>									
		%	%	%	%	%			
Kuwait All Share Index	7,326.82	0.19	-0.51	4.03	4.03	4.03	43.40 KWD	2.20	28.06
Kuwait Premier Index	7,991.14	0.24	-0.46	4.61	4.61	4.61	32.62 KWD	2.34	28.12
Kuwait Main Index	6,019.69	0.07	-0.67	2.27	2.27	2.27	10.78 KWD	1.74	27.99
NIC 50	8,886.71	0.20	-0.58	4.27	4.27	4.27	28.60 KWD	2.32	27.12
<b>Kuwait Sector</b>									
Banking	1,701.320	0.26	-0.65	4.84	4.84	4.84	25.21 KWD	1.33	29.12
Telecom	1,094.870	-0.13	0.09	0.50	0.50	0.50	3.36 KWD	0.93	15.16
Industrials	1,166.790	0.50	0.22	2.22	2.22	2.22	4.11 KWD	0.89	13.90
Financial services	1,504.690	0.01	-1.08	5.72	5.72	5.72	3.91 KWD	0.86	13.18
Real estate	1,354.100	0.07	-0.59	2.09	2.09	2.09	2.92 KWD	0.75	47.81
Basic materials	1,111.760	0.16	0.58	8.49	8.49	8.49	0.99 KWD	1.89	29.62
Health care	806.880	0.00	-0.53	1.24	1.24	1.24	0.40 KWD	6.16	13.01
Consumer services	728.280	-0.38	-0.80	-0.39	-0.39	-0.39	0.74 KWD	0.88	15.33
Insurance	1,506.840	0.21	-0.59	-1.73	-1.73	-1.73	0.63 KWD	0.79	8.49
Consumer Disc	1,437.760	0.15	0.06	7.57	7.57	7.57	0.22 KWD	1.34	8.96
Energy	1,432.490	-0.27	0.28	0.30	0.30	0.30	0.30 KWD	1.04	15.13
Technology	668.570	-1.18	-1.71	-2.23	-2.23	-2.23	0.01 KWD	0.80	0.00
Utilities	586.840	-0.45	-1.33	-2.19	-2.19	-2.19	0.25 KWD	3.97	18.95

S&P GCC Composite LargeMidCap Index



### What Move the GCC markets

#### Oil Prices

Oil prices fell on Thursday as the U.S. dollar strengthened following signs that the U.S. Federal Reserve will tighten monetary policy in the world's biggest oil user, Brent crude futures were down 57 cents, or 0.9%, to \$89.18 a barrel.

#### Kuwait Market

The market closed today up by + 0.19%, closed at 7,326.82 value traded 54.1 million KD, Premier market value traded reached 30.6 million KD and closed at 7,991.14 up by + 0.24%.

#### Saudi Market

The Market closed down today by - 0.03%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.



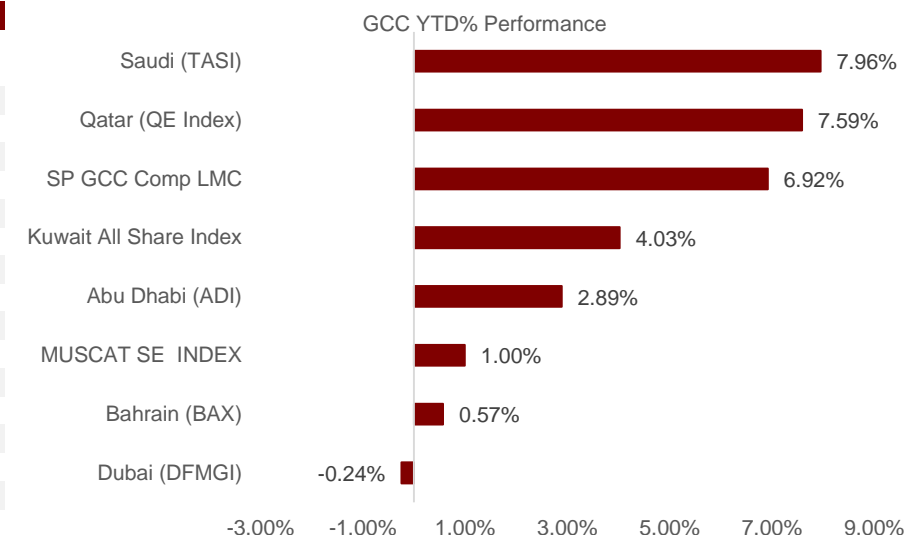
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	1.043	0.48	-0.10	4.61	4.61	4.61	7.47 KWD	1.92	27.00
KFH	0.905	0.56	-0.55	8.77	8.77	8.77	7.60 KWD	3.50	32.00
Zain	0.596	-0.17	0.17	0.17	0.17	0.17	2.58 KWD	2.17	13.67
BOUBYAN BANK	0.805	-1.11	-2.78	1.90	1.90	1.90	2.59 KWD	3.69	34.00
Agility	0.988	0.51	0.51	4.55	4.55	4.55	2.19 KWD	1.00	2.09
<b>Saudi Arabia</b>									
ARAMCO	36.90	0.00	0.14	3.07	3.07	3.07	7,320.00 SAR	6.85	21.96
SABIC	123.40	-0.48	-2.37	6.38	6.38	6.38	372.00 SAR	2.14	35.00
STC	117.60	-1.18	-3.61	4.63	4.63	4.63	240.00 SAR	3.50	21.03
AL-RAJHI BANK	147.80	-0.67	-1.73	4.23	4.23	4.23	369.50 SAR	5.81	26.60
NCB	73.00	1.39	-1.35	13.35	13.35	13.35	320.18 SAR	1.99	20.77
<b>United Arab Emirates</b>									
ETISALAT.AD	32.66	1.87	5.35	3.03	3.03	3.03	280.04 AED	6.08	30.34
FAB.AD	20.60	0.00	0.19	9.34	9.34	9.34	223.86 AED	2.05	18.42
EMIRATES NBD	13.70	1.48	7.87	1.11	1.11	1.11	85.27 AED	1.00	10.69
DB ISLAMIC BK	5.49	0.18	-0.18	2.04	2.04	2.04	39.46 AED	1.03	14.53
EMAAR PROPERT	4.80	0.42	0.00	-1.84	-1.84	-1.84	38.53 AED	0.59	12.22
<b>Qatar</b>									
QNB	21.88	0.23	0.37	8.37	8.37	8.37	201.63 QAR	2.04	16.49
INDUSTRIES QAT	16.78	0.66	0.84	8.33	8.33	8.33	100.85 QAR	2.70	15.15
QA ISLAMIC BK	19.60	1.03	-1.75	6.93	6.93	6.93	45.84 QAR	1.85	13.82
MASRAF AL RAYA	5.029	-0.42	-1.00	8.38	8.38	8.38	46.97 QAR	2.55	17.14
MESAIEED PETRO	2.40	0.17	-0.70	14.83	14.83	14.83	30.10 QAR	1.80	18.52
<b>OMAN</b>									
BANK MUSCAT	0.528	0.76	0.76	9.09	9.09	9.09	1.87 OMR	0.89	8.33
OMANTEL	0.792	1.54	1.02	5.32	5.32	5.32	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	0.200	-4.31	-6.98	2.04	2.04	2.04	0.34 QAR	0.62	12.71
OMINVEST	0.312	4.00	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 up today by +0.19 % The leading sector bottom performance indices today are Technology -1.18 % Utilities -0.45 % Consumer services -0.38 % respectively

Telecommunication sector is down today by - 0.13 % and act defensively in COVID19 also it overperform Kuwait all Share Index in YTD perspective by + 0.50 %

#### KSA

Saudi Armco has a flat performance today, SABIC has a negative performance today by - 0.48%

STC have negative performance today by - 1.18%, Al Rajhi Bank has a negative performance today by - 0.67 %

#### UAE

ETISALAT AD closed up today by + 1.87 %, and act defensively with COVID19



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