



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, April 11, 2022





Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	13,483.23	0.66	1.27	3.00	3.00	19.51	12,021 SAR	2.50	21.54
Qatar (QE Index)	14,494.35	0.12	2.87	7.10	7.10	24.67	749 QAR	1.86	17.95
Dubai (DFMGI)	3,587.68	1.30	1.30	1.73	1.73	12.26	349 AED	1.70	24.46
Abu Dhabi (ADI)	10,166.20	0.72	0.72	2.19	2.19	19.77	1,435 AED	1.78	20.60
Bahrain (BAX)	2,099.54	-1.08	-1.01	1.25	1.25	16.82	21 BHD	1.26	17.53
MUSCAT SE INDEX	4,241.20	0.01	0.75	0.86	0.86	2.70	5 OMR	0.94	13.25
SP GCC Comp LMC	230.51	0.64	1.30	3.49	3.49	21.49			

Developed Markets

MSCI World Index	2,972.40	-1.32	-1.32	-2.64	-2.64	-8.02			
U.S. (S&P 500)	4,412.53	-1.69	-1.69	-2.60	-2.60	-7.42			
U.K. (FTSE 100)	7,618.31	-0.67	-0.67	1.37	1.37	3.17			
Japan (Topix)	1,889.64	-0.38	-0.38	-2.92	-2.92	-5.15			

Emerging Markets

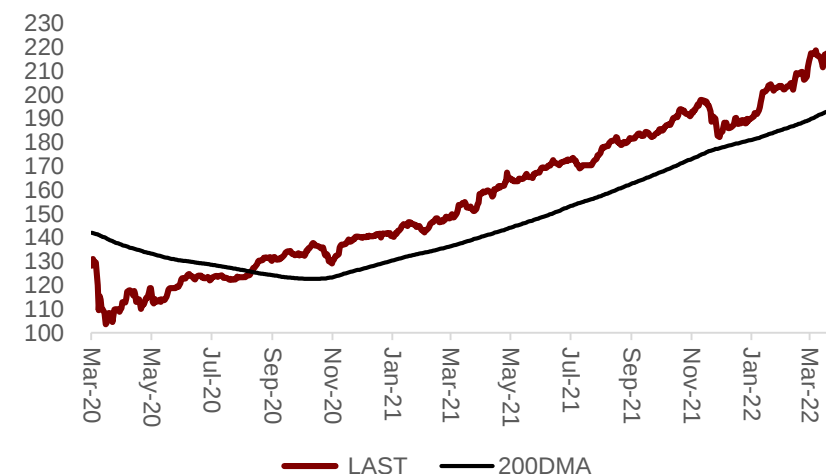
MSCI EM Index	1,111.76	-1.43	-1.43	-2.63	-2.63	-9.76			
China (SSE Composite)	3,167.13	-2.61	-2.61	-2.62	-2.62	-12.99			
India (Sensex)	58,964.57	-0.81	-0.81	0.68	0.68	1.22			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	8,242.86	-0.28	-0.22	1.18	1.18	17.03	48.89 KWD	2.53	29.58
Kuwait Premier Index	9,133.18	-0.09	-0.36	0.79	0.79	19.56	37.48 KWD	2.71	30.80
Kuwait Main Index	6,415.14	-0.95	0.28	2.56	2.56	8.98	11.41 KWD	1.91	25.62
NIC 50	10,244.71	-0.01	-0.37	0.78	0.78	20.21	28.60 KWD	2.69	29.80

Kuwait Sector

Banking	1,943.37	-0.03	-0.69	0.68	0.68	19.76	28.83 KWD	1.33	31.80
Telecom	1,359.26	-0.79	2.26	7.69	7.69	24.77	4.16 KWD	0.80	22.26
Industrials	1,355.50	-0.69	1.46	4.68	4.68	18.75	4.82 KWD	1.02	25.28
Financial services	1,626.32	-0.98	-0.85	-2.08	-2.08	14.26	4.17 KWD	0.94	21.18
Real estate	1,397.47	-0.60	-0.50	0.16	0.16	5.36	3.01 KWD	0.73	25.05
Basic materials	1,154.04	0.28	0.57	-0.66	-0.66	12.61	1.03 KWD	1.85	29.53
Health care	495.03	-3.16	-3.16	0.00	0.00	-37.89	0.25 KWD	3.05	15.85
Consumer services	702.41	-0.59	-0.73	-1.31	-1.31	-3.93	0.79 KWD	0.93	17.13
Insurance	1,556.35	0.03	-1.25	-4.00	-4.00	1.50	0.65 KWD	0.76	9.69
Consumer Disc	1,537.98	0.30	-0.14	-0.32	-0.32	15.06	0.21 KWD	1.29	10.51
Energy	1,290.47	0.41	0.47	-0.64	-0.64	-9.64	0.27 KWD	0.91	17.09
Technology	733.32	6.44	6.44	8.39	8.39	7.23	0.01 KWD	0.87	0.00
Utilities	589.47	0.90	0.00	0.45	0.45	-1.76	0.25 KWD	3.97	19.03

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices dropped by more than \$2 a barrel on Monday after a second straight weekly decline on plans to release record volumes of crude and oil products from strategic stocks and on continuing coronavirus lockdowns in China, Brent crude for June delivery was down \$2.97, or 2.9%, at \$99.78 a barrel.

Kuwait Market

The market closed today down by - 0.28%, closed at 8,242.86 value traded 83.1 million KD, Premier market value traded reached 60.3 million KD and closed at 9,133.18 down by - 0.09%.

Saudi Market

The Market closed up today by + 0.66%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



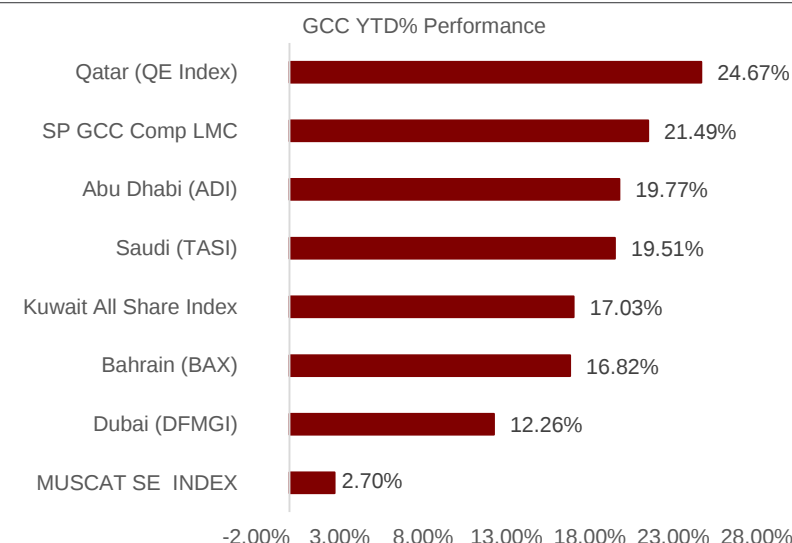
	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.051	0.10	-0.38	-4.37	-4.37	10.69	7.93 KWD	2.00	27.00
KFH	0.992	0.71	-1.49	1.89	1.89	31.15	9.20 KWD	4.23	32.00
Zain	0.627	2.12	2.12	-0.16	-0.16	5.38	2.71 KWD	2.28	14.61
BOUBYAN BANK	0.925	0.76	0.98	3.43	3.43	22.94	3.09 KWD	4.33	34.00
Agility	1.198	-2.04	1.70	8.42	8.42	26.77	2.67 KWD	1.25	2.58
Saudi Arabia									
ARAMCO	42.70	-0.23	-0.35	-0.93	-0.93	19.27	8,539.54 SAR	7.67	21.65
SABIC	132.40	-2.36	-1.49	1.07	1.07	14.14	397.18 SAR	2.20	35.00
STC	115.20	0.52	-0.69	6.86	6.86	2.49	230.39 SAR	3.32	20.24
AL-RAJHI BANK	167.40	1.33	1.82	4.23	4.23	18.05	418.48 SAR	6.22	28.01
NCB	73.30	1.52	1.81	3.39	3.39	13.82	328.22 SAR	2.00	20.87
United Arab Emirates									
ETISALAT.AD	37.84	0.16	0.16	2.38	2.38	19.37	329.09 AED	6.92	35.32
FAB.AD	23.90	0.17	0.17	1.27	1.27	28.34	264.04 AED	2.34	21.67
EMIRATES NBD	14.70	1.38	1.38	-2.00	-2.00	8.49	92.85 AED	1.11	10.66
DB ISLAMIC BK	6.18	0.49	0.49	0.16	0.16	14.87	44.75 AED	1.15	11.72
EMAAR PROPERT	6.14	1.66	1.66	2.33	2.33	25.56	50.22 AED	0.81	11.80
Qatar									
QNB	25.94	3.43	6.79	12.44	12.44	28.48	240.16 QAR	2.42	19.21
INDUSTRIES QAT	19.75	-0.75	0.77	3.95	3.95	27.50	119.77 QAR	3.03	14.77
QA ISLAMIC BK	26.00	-0.57	3.13	9.06	9.06	41.84	61.58 QAR	2.48	18.29
MASRAF AL RAYA	5.82	0.14	4.79	12.48	12.48	25.32	54.21 QAR	2.21	25.39
MESAIEED PETRO	2.91	0.24	0.90	-0.14	-0.14	39.04	36.59 QAR	2.14	19.61
OMAN									
BANK MUSCAT	0.548	0.37	0.74	7.45	7.45	18.88	2.06 OMR	0.96	8.33
OMANTEL	0.896	0.00	1.82	2.28	2.28	19.15	0.67 OMR	1.16	7.69
BANK DHOFAR	0.114	0.88	0.88	-0.87	-0.87	-9.52	0.34 QAR	0.49	14.93
NAT BANK OF OMAN	0.195	-2.50	-2.50	-4.88	-4.88	-1.02	0.31 QAR	0.56	12.71
OMINVEST	0.322	1.26	1.26	-4.73	-4.73	5.23	0.21 QAR	0.94	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
30-Mar-22	21.89%	12.79%	0.06%	0.48%	0.36%	6.89%	2.55%	10.67%	5.44%	3.98%
6-Apr-22	21.97%	12.93%	0.06%	0.48%	0.36%	7.06%	2.53%	10.72%	5.46%	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 -0.28 %The leading sector bottom performance indices today are Health care -3.16 % Financial services -0.98 % Telecom -0.79 % respectively

Telecommunication sector are down today by -0.79 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 7.74 %

KSA

Saudi Armco has a negative performance today by -0.23 %, SABIC has a negative performance today by -2.36 %

STC has a positive performance today by + 0.52 %, Al Rajhi Bank has a positive performance today by + 1.33 %

UAE

ETISALAT .AD has a positive performance today by + 0.16 %, FAB.AD has a positive performance today by + 0.17 %



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