



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Tuesday, April 12, 2022





### Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>									
		%	%	%	%	%			
Saudi (TASI)	13,646.12	1.21	2.49	4.25	4.25	20.96	12,579 SAR	2.49	21.74
Qatar (QE Index)	14,115.08	-2.62	0.18	4.30	4.30	21.41	712 QAR	1.87	17.63
Dubai (DFMGI)	3,568.83	-0.53	0.77	1.20	1.20	11.67	347 AED	1.64	24.18
Abu Dhabi (ADI)	10,101.85	-0.63	0.08	1.54	1.54	19.01	1,435 AED	1.78	20.64
Bahrain (BAX)	2,103.71	0.20	-0.81	1.45	1.45	17.05	21 BHD	1.26	17.52
MUSCAT SE INDEX	4,247.82	0.16	0.91	1.01	1.01	2.86	5 OMR	0.94	13.25
SP GCC Comp LMC	230.84	0.14	1.44	3.64	3.64	21.66			

### Developed Markets

MSCI World Index	2,959.78	-0.42	-1.74	-3.06	-3.06	-8.41			
U.S. (S&P 500)	4,397.45	-0.34	-2.02	-2.93	-2.93	-7.74			
U.K. (FTSE 100)	7,576.66	-0.55	-1.21	0.81	0.81	2.60			
Japan (Topix)	1,863.63	-1.38	-1.75	-4.25	-4.25	-6.46			

### Emerging Markets

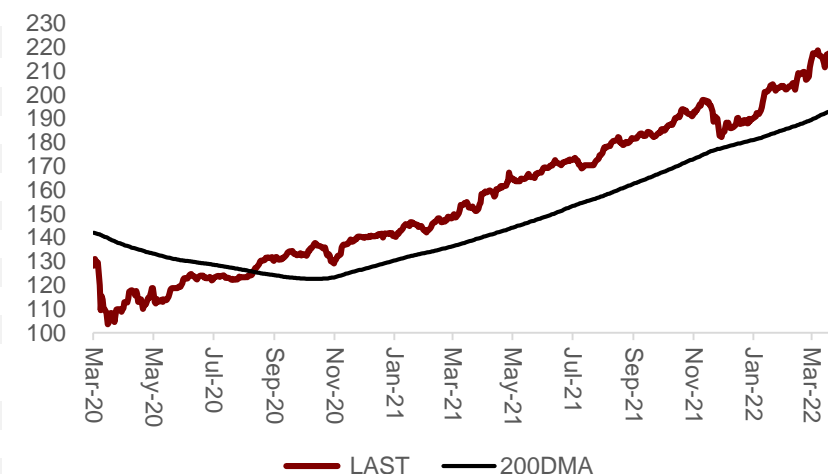
MSCI EM Index	1,110.40	-0.12	-1.55	-2.75	-2.75	-9.87			
China (SSE Composite)	3,213.33	1.46	-1.18	-1.20	-1.20	-11.72			
India (Sensex)	58,576.37	-0.66	-1.46	0.01	0.01	0.55			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>									
		%	%	%	%	%			
Kuwait All Share Index	8,243.62	0.01	-0.21	1.19	1.19	17.04	48.95 KWD	2.52	29.53
Kuwait Premier Index	9,134.14	0.01	-0.35	0.80	0.80	19.57	37.52 KWD	2.71	30.73
Kuwait Main Index	6,415.45	0.00	0.29	2.57	2.57	8.99	11.43 KWD	1.90	25.62
NIC 50	10,248.67	0.04	-0.36	0.79	0.79	20.25	28.60 KWD	2.69	29.73

### Kuwait Sector

Banking	1,946.55	0.16	-0.53	0.85	0.85	19.95	28.91 KWD	1.34	31.73
Telecom	1,352.31	-0.51	1.73	7.14	7.14	24.14	4.15 KWD	0.80	21.53
Industrials	1,352.71	-0.21	1.25	4.46	4.46	18.50	4.81 KWD	1.01	25.46
Financial services	1,623.64	-0.16	-1.01	-2.24	-2.24	14.07	4.17 KWD	0.92	21.24
Real estate	1,395.46	-0.14	-0.65	0.02	0.02	5.21	3.01 KWD	0.74	25.08
Basic materials	1,158.47	0.38	0.96	-0.28	-0.28	13.05	1.03 KWD	1.86	29.62
Health care	488.98	-1.22	-4.34	-1.22	-1.22	-38.65	0.24 KWD	3.05	15.28
Consumer services	705.54	0.45	-0.29	-0.87	-0.87	-3.50	0.79 KWD	0.92	17.08
Insurance	1,542.23	-0.91	-2.14	-4.87	-4.87	0.58	0.65 KWD	0.75	9.69
Consumer Disc	1,533.35	-0.30	-0.44	-0.62	-0.62	14.72	0.21 KWD	1.30	10.52
Energy	1,325.91	2.75	3.23	2.09	2.09	-7.16	0.28 KWD	0.91	17.24
Technology	683.85	-6.75	-0.74	1.07	1.07	0.00	0.01 KWD	0.81	0.00
Utilities	589.47	0.00	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 climbed on Tuesday as fears of a demand downturn in China eased after Shanghai relaxed some Covid-19 related restrictions, and OPEC warned it would be impossible to increase output enough to offset lost Russian supply, Brent crude futures were up \$3.33, or 3.4%, to \$101.81 a barrel.

#### Kuwait Market

The market closed today up by + 0.01%, closed at 8,243.62 value traded 45.6 million KD, Premier market value traded reached 33.8 million KD and closed at 9,134.14 up by + 0.01%.

#### Saudi Market

The Market closed up today by + 1.21%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.



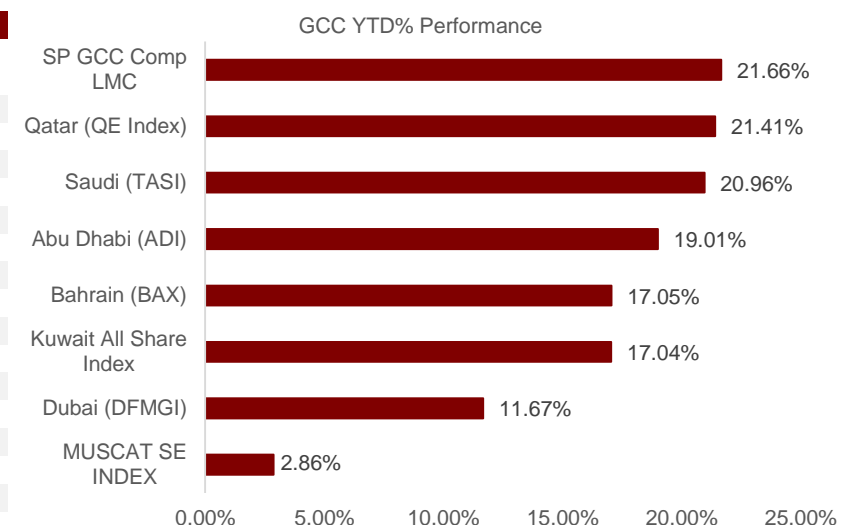
	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	1.057	0.57	0.19	-3.82	-3.82	11.32	7.98 KWD	2.01	27.00
KFH	0.990	-0.20	-1.69	1.68	1.68	30.89	9.19 KWD	4.22	32.00
Zain	0.629	0.32	2.44	0.16	0.16	5.71	2.72 KWD	2.29	14.66
BOUBYAN BANK	0.920	-0.54	0.44	2.88	2.88	22.28	3.07 KWD	4.30	34.00
Agility	1.185	-1.09	0.59	7.24	7.24	25.40	2.64 KWD	1.24	2.55
<b>Saudi Arabia</b>									
ARAMCO	43.00	0.70	0.35	-0.23	-0.23	20.11	8,600.00 SAR	7.72	21.60
SABIC	129.40	-2.27	-3.72	-1.22	-1.22	11.55	388.20 SAR	2.15	35.00
STC	115.40	0.17	-0.52	7.05	7.05	2.67	230.80 SAR	3.33	20.35
AL-RAJHI BANK	172.40	2.99	4.87	7.35	7.35	21.58	431.00 SAR	6.40	28.38
NCB	74.90	2.18	4.03	5.64	5.64	16.30	335.40 SAR	2.05	21.19
<b>United Arab Emirates</b>									
ETISALAT.AD	36.80	-2.75	-2.59	-0.43	-0.43	16.09	320.04 AED	6.73	34.35
FAB.AD	23.66	-1.00	-0.84	0.25	0.25	27.05	261.39 AED	2.32	21.45
EMIRATES NBD	14.90	1.36	2.76	-0.67	-0.67	9.96	94.12 AED	1.13	10.80
DB ISLAMIC BK	6.17	-0.16	0.33	0.00	0.00	14.68	44.68 AED	1.15	11.70
EMAAR PROPERT	6.00	-2.28	-0.66	0.00	0.00	22.70	49.08 AED	0.80	11.53
<b>Qatar</b>									
QNB	24.02	-7.40	-1.11	4.12	4.12	18.97	221.99 QAR	2.24	17.79
INDUSTRIES QAT	19.23	-2.63	-1.89	1.21	1.21	24.14	116.41 QAR	2.95	14.38
QA ISLAMIC BK	25.35	-2.50	0.56	6.33	6.33	38.30	59.94 QAR	2.42	17.83
MASRAF AL RAYA	5.70	-1.98	2.72	10.25	10.25	22.84	53.04 QAR	2.17	24.89
MESAIEED PETRO	2.90	-0.21	0.69	-0.34	-0.34	38.76	36.46 QAR	2.13	19.57
<b>OMAN</b>									
BANK MUSCAT	0.540	-1.46	-0.74	5.88	5.88	17.15	2.04 OMR	0.95	8.33
OMANTEL	0.892	-0.45	1.36	1.83	1.83	18.62	0.67 OMR	1.16	7.69
BANK DHOFAR	0.116	1.75	2.65	0.87	0.87	-7.94	0.35 QAR	0.50	14.93
NAT BANK OF OMAN	0.200	2.56	0.00	-2.44	-2.44	1.52	0.32 QAR	0.58	12.71
OMINVEST	0.322	0.00	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 up today by + 0.01 % The leading sector best performance indices today are Energy 2.75 % Consumer services 0.45 % Basic materials 0.38 % respectively

Telecommunication sector are down today by -0.51 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 7.1 %

#### KSA

Saudi Armco has a positive performance today by + 0.70 %, SABIC have negative performance today by -2.26 %

STC has a positive performance today by + 0.17 %, Al Rajhi Bank has a positive performance today by + 2.99 %

#### UAE

ETISALAT .AD have negative performance today by -2.75 %, FAB.AD have negative performance today by -1.0 %



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