

شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, April 13, 2022





Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	13,540.27	-0.78	1.70	3.44	3.44	20.02	12,491 SAR	2.46	21.91
Qatar (QE Index)	14,192.38	0.55	0.73	4.87	4.87	22.08	715 QAR	1.88	17.69
Dubai (DFMGI)	3,582.22	0.38	1.15	1.58	1.58	12.09	348 AED	1.62	23.87
Abu Dhabi (ADI)	10,092.81	-0.09	-0.01	1.45	1.45	18.90	1,435 AED	1.78	20.62
Bahrain (BAX)	2,102.69	-0.05	-0.86	1.41	1.41	16.99	21 BHD	1.26	17.46
MUSCAT SE INDEX	4,274.28	0.62	1.54	1.64	1.64	3.50	5 OMR	0.94	13.25
SP GCC Comp LMC	229.61	-0.53	0.90	3.09	3.09	21.02			

Developed Markets

MSCI World Index	2,985.07	0.85	-0.90	-2.23	-2.23	-7.63			
U.S. (S&P 500)	4,446.59	1.12	-0.93	-1.85	-1.85	-6.71			
U.K. (FTSE 100)	7,580.80	0.05	-1.16	0.87	0.87	2.66			
Japan (Topix)	1,890.06	1.42	-0.35	-2.89	-2.89	-5.13			

Emerging Markets

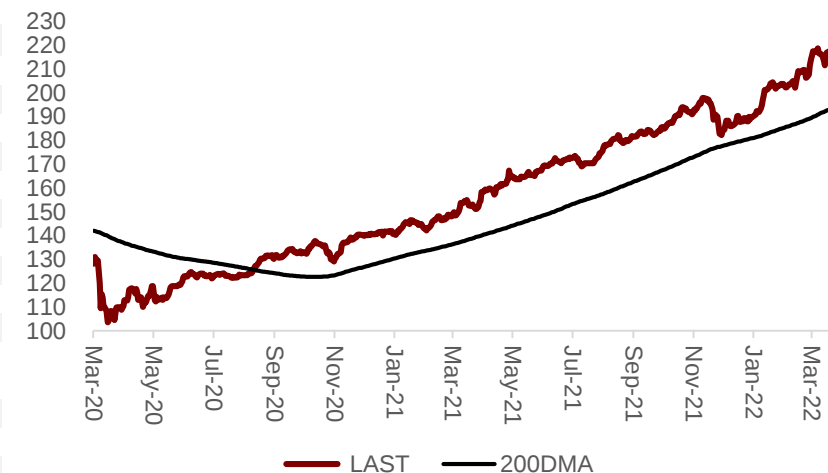
MSCI EM Index	1,119.32	0.80	-0.76	-1.97	-1.97	-9.15			
China (SSE Composite)	3,186.82	-0.82	-2.00	-2.01	-2.01	-12.44			
India (Sensex)	58,338.93	-0.41	-1.86	-0.39	-0.39	0.15			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	8,271.42	0.34	0.13	1.53	1.53	17.44	49.17 KWD	2.53	29.51
Kuwait Premier Index	9,157.87	0.26	-0.09	1.06	1.06	19.88	37.67 KWD	2.71	30.63
Kuwait Main Index	6,454.49	0.61	0.90	3.19	3.19	9.65	11.49 KWD	1.92	25.90
NIC 50	10,283.52	0.34	-0.10	1.05	1.05	20.66	28.60 KWD	2.69	29.63

Kuwait Sector

Banking	1,948.20	0.08	-0.44	0.93	0.93	20.05	28.98 KWD	1.34	31.63
Telecom	1,360.95	0.64	2.38	7.83	7.83	24.93	4.18 KWD	0.80	22.16
Industrials	1,378.78	1.93	3.20	6.47	6.47	20.79	4.91 KWD	1.01	25.49
Financial services	1,630.08	0.40	-0.62	-1.85	-1.85	14.53	4.18 KWD	0.96	21.33
Real estate	1,397.37	0.14	-0.51	0.15	0.15	5.35	3.02 KWD	0.75	25.20
Basic materials	1,157.24	-0.11	0.85	-0.39	-0.39	12.93	1.03 KWD	1.86	29.58
Health care	488.98	0.00	-4.34	-1.22	-1.22	-38.65	0.24 KWD	3.05	15.28
Consumer services	703.44	-0.30	-0.59	-1.17	-1.17	-3.78	0.79 KWD	0.93	17.13
Insurance	1,545.62	0.22	-1.93	-4.66	-4.66	0.80	0.65 KWD	0.75	9.69
Consumer Disc	1,538.90	0.36	-0.08	-0.26	-0.26	15.13	0.21 KWD	1.29	10.52
Energy	1,313.38	-0.95	2.26	1.12	1.12	-8.04	0.27 KWD	0.91	16.00
Technology	683.85	0.00	-0.74	1.07	1.07	0.00	0.01 KWD	0.81	0.00
Utilities	592.11	0.45	0.45	0.90	0.90	-1.32	0.25 KWD	3.99	19.12

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices eased on Wednesday, giving up earlier gains, after China and Japan reported weak economic data, fueling concerns about growth and oil demand in the world's top consumers, Brent crude futures was down 34 cents, or 0.3%, to \$104.30 a barrel.

Kuwait Market

The market closed today up by + 0.34%, closed at 8,271.42 value traded 51.7 million KD, Premier market value traded reached 35.6 million KD and closed at 9,157.87 up by + 0.26%.

Saudi Market

The Market closed down today by - 0.78%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



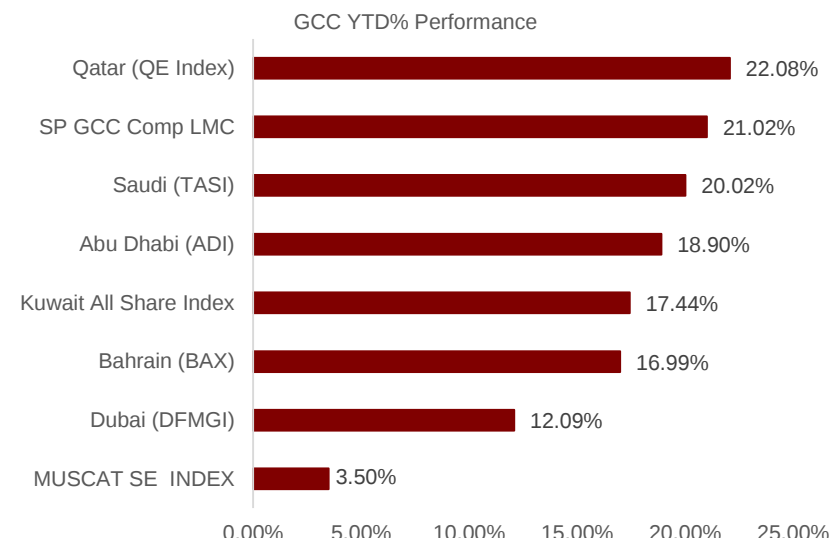
	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.059	0.19	0.38	-3.64	-3.64	11.53	8.01 KWD	2.01	27.00
KFH	0.990	0.00	-1.69	1.68	1.68	30.89	9.20 KWD	4.22	32.00
Zain	0.629	0.00	2.44	0.16	0.16	5.71	2.72 KWD	2.29	14.66
BOUBAYAN BANK	0.919	-0.11	0.33	2.76	2.76	22.15	3.07 KWD	4.30	34.00
Agility	1.219	2.87	3.48	10.32	10.32	28.99	2.72 KWD	1.27	2.63
Saudi Arabia									
ARAMCO	42.65	-0.81	-0.47	-1.04	-1.04	19.13	8,530.00 SAR	7.66	21.75
SABIC	129.20	-0.15	-3.87	-1.37	-1.37	11.38	387.60 SAR	2.15	35.00
STC	114.00	-1.21	-1.72	5.75	5.75	1.42	228.00 SAR	3.29	20.39
AL-RAJHI BANK	169.00	-1.97	2.80	5.23	5.23	19.18	422.50 SAR	6.28	29.23
NCB	75.90	1.34	5.42	7.05	7.05	17.86	339.88 SAR	2.08	21.65
United Arab Emirates									
ETISALAT.AD	36.90	0.27	-2.33	-0.16	-0.16	16.40	320.91 AED	6.74	34.44
FAB.AD	23.40	-1.10	-1.93	-0.85	-0.85	25.66	258.51 AED	2.29	21.22
EMIRATES NBD	15.05	1.01	3.79	0.33	0.33	11.07	95.06 AED	1.14	10.91
DB ISLAMIC BK	6.20	0.49	0.81	0.49	0.49	15.24	44.89 AED	1.15	11.75
EMAAR PROPERT	6.00	0.00	-0.66	0.00	0.00	22.70	49.08 AED	0.80	11.53
Qatar									
QNB	24.37	1.46	0.33	5.64	5.64	20.70	224.43 QAR	2.27	18.05
INDUSTRIES QAT	19.43	1.04	-0.87	2.26	2.26	25.44	117.20 QAR	2.98	14.53
QA ISLAMIC BK	25.45	0.39	0.95	6.75	6.75	38.84	59.96 QAR	2.43	17.90
MASRAF AL RAYA	5.71	0.18	2.90	10.44	10.44	23.06	52.95 QAR	2.17	24.93
MESAIEED PETRO	2.90	0.00	0.69	-0.34	-0.34	38.76	36.33 QAR	2.13	19.57
OMAN									
BANK MUSCAT	0.540	0.00	-0.74	5.88	5.88	17.15	2.03 OMR	0.95	8.33
OMANTEL	0.896	0.45	1.82	2.28	2.28	19.15	0.68 OMR	1.17	7.69
BANK DHOFAR	0.119	2.59	5.31	3.48	3.48	-5.56	0.36 QAR	0.51	14.93
NAT BANK OF OMAN	0.200	0.00	0.00	-2.44	-2.44	1.52	0.33 QAR	0.59	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
6-Apr-22	21.97%	12.93%	0.06%	0.48%	0.36%	7.06%	2.53%	10.72%	5.46%	3.99%
13-Apr-22	22.10%	13.08%	0.06%	0.49%	0.36%	6.80%	2.52%	10.75%	5.49%	3.98%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.34 %The leading sector best performance indices today are Industrials 1.93 % Telecom 0.64 % Utilities 0.45 % respectively

Telecommunication sector are up today by + 0.64 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 7.49 %

KSA

Saudi Armco has a negative performance today by -0.81 %, SABIC has a negative performance today by -0.15 %

STC have negative performance today by -1.21 %, Al Rajhi Bank have negative performance today by -1.97 %

UAE

ETISALAT .AD has a positive performance today by + 0.27 %, FAB.AD have negative performance today by -1.10 %



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NATIONAL INVESTMENTS COMPANY

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