

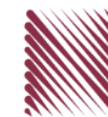


شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Thursday, April 14, 2022

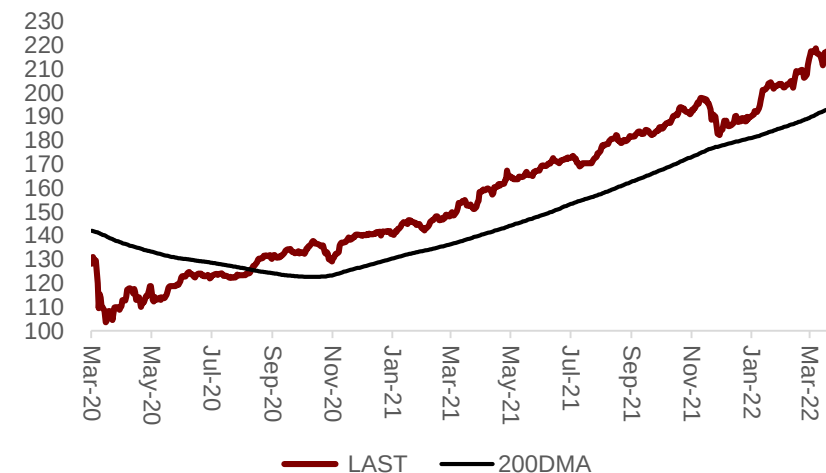




### Market Watch

| Description              | Close     | Day Δ | WTD   | MTD   | QTD   | YTD    | M Cap (in Bn) | PBV  | PE    |
|--------------------------|-----------|-------|-------|-------|-------|--------|---------------|------|-------|
| <b>GCC Markets</b>       |           |       |       |       |       |        |               |      |       |
| Saudi (TASI)             | 13,621.08 | 0.60  | 2.31  | 4.05  | 4.05  | 20.74  | 12,071 SAR    | 2.50 | 21.94 |
| Qatar (QE Index)         | 14,125.07 | -0.47 | 0.25  | 4.37  | 4.37  | 21.50  | 719 QAR       | 1.86 | 17.25 |
| Dubai (DFMGI)            | 3,601.67  | 0.08  | 1.22  | 1.66  | 1.66  | 12.17  | 350 AED       | 1.61 | 23.48 |
| Abu Dhabi (ADI)          | 9,970.11  | -1.26 | -1.26 | 0.17  | 0.17  | 17.41  | 1,435 AED     | 1.79 | 20.71 |
| Bahrain (BAX)            | 2,100.67  | -0.10 | -0.95 | 1.31  | 1.31  | 16.88  | 21 BHD        | 1.25 | 17.45 |
| MUSCAT SE INDEX          | 4,239.24  | -0.82 | 0.71  | 0.81  | 0.81  | 2.66   | 5 OMR         | 0.94 | 13.25 |
| SP GCC Comp LMC          | 229.80    | 0.07  | 0.97  | 3.15  | 3.15  | 21.11  |               |      |       |
| <b>Developed Markets</b> |           |       |       |       |       |        |               |      |       |
| MSCI World Index         | 2,959.67  | -0.82 | -1.71 | -3.03 | -3.03 | -8.39  |               |      |       |
| U.S. (S&P 500)           | 4,392.59  | -1.21 | -2.13 | -3.04 | -3.04 | -7.84  |               |      |       |
| U.K. (FTSE 100)          | 7,616.38  | 0.47  | -0.69 | 1.34  | 1.34  | 3.14   |               |      |       |
| Japan (Topix)            | 1,896.31  | 0.95  | 0.59  | -1.97 | -1.97 | -4.23  |               |      |       |
| <b>Emerging Markets</b>  |           |       |       |       |       |        |               |      |       |
| MSCI EM Index            | 1,112.90  | -0.17 | -0.94 | -2.14 | -2.14 | -9.31  |               |      |       |
| China (SSE Composite)    | 3,211.24  | 1.22  | -0.81 | -0.82 | -0.82 | -11.38 |               |      |       |
| India (Sensex)           | 58,338.93 | 0.00  | -1.86 | -0.39 | -0.39 | 0.15   |               |      |       |
| Description              | Close     | Day Δ | WTD   | MTD   | QTD   | YTD    | M Cap (in Bn) | PBV  | PE    |
| <b>Kuwait</b>            |           |       |       |       |       |        |               |      |       |
| Kuwait All Share Index   | 8,312.59  | 0.50  | 0.62  | 2.04  | 2.04  | 18.02  | 49.35 KWD     | 2.54 | 29.92 |
| Kuwait Premier Index     | 9,174.19  | 0.18  | 0.09  | 1.24  | 1.24  | 20.10  | 37.65 KWD     | 2.71 | 30.66 |
| Kuwait Main Index        | 6,558.73  | 1.61  | 2.53  | 4.86  | 4.86  | 11.42  | 11.70 KWD     | 1.96 | 27.61 |
| NIC 50                   | 10,301.29 | 0.17  | 0.08  | 1.23  | 1.23  | 20.87  | 28.60 KWD     | 2.69 | 29.66 |
| <b>Kuwait Sector</b>     |           |       |       |       |       |        |               |      |       |
| Banking                  | 1,951.34  | 0.16  | -0.28 | 1.10  | 1.10  | 20.25  | 28.96 KWD     | 1.33 | 31.66 |
| Telecom                  | 1,414.31  | 3.92  | 6.40  | 12.05 | 12.05 | 29.83  | 4.34 KWD      | 1.08 | 22.31 |
| Industrials              | 1,389.02  | 0.74  | 3.97  | 7.26  | 7.26  | 21.68  | 4.95 KWD      | 1.01 | 25.58 |
| Financial services       | 1,623.84  | -0.38 | -1.00 | -2.23 | -2.23 | 14.09  | 4.17 KWD      | 0.95 | 21.24 |
| Real estate              | 1,399.27  | 0.14  | -0.38 | 0.29  | 0.29  | 5.49   | 3.02 KWD      | 0.77 | 40.02 |
| Basic materials          | 1,158.54  | 0.11  | 0.96  | -0.28 | -0.28 | 13.05  | 1.03 KWD      | 1.85 | 29.62 |
| Health care              | 488.98    | 0.00  | -4.34 | -1.22 | -1.22 | -38.65 | 0.24 KWD      | 3.05 | 15.28 |
| Consumer services        | 703.50    | 0.01  | -0.58 | -1.16 | -1.16 | -3.78  | 0.81 KWD      | 0.93 | 17.23 |
| Insurance                | 1,541.75  | -0.25 | -2.17 | -4.90 | -4.90 | 0.55   | 0.64 KWD      | 0.75 | 9.50  |
| Consumer Disc            | 1,571.43  | 2.11  | 2.03  | 1.84  | 1.84  | 17.57  | 0.21 KWD      | 1.30 | 10.49 |
| Energy                   | 1,301.68  | -0.89 | 1.35  | 0.22  | 0.22  | -8.86  | 0.27 KWD      | 0.92 | 16.00 |
| Technology               | 684.58    | 0.11  | -0.63 | 1.18  | 1.18  | 0.11   | 0.01 KWD      | 0.81 | 0.00  |
| Utilities                | 586.84    | -0.89 | -0.45 | 0.00  | 0.00  | -2.19  | 0.25 KWD      | 3.95 | 18.95 |

S&P GCC Composite LargeMidCap Index



### What Move the GCC markets

#### Oil Prices

Oil prices fell on Thursday, after rising sharply in the first half of the week, as traders weighed a larger-than-expected build in U.S. oil stocks against tightening global supply, Brent futures were down 45 cents, or 0.4%, at \$108.33 a barrel.

#### Kuwait Market

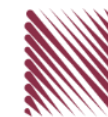
The market closed today up by + 0.50%, closed at 8,312.59 value traded 64.7 million KD, Premier market value traded reached 43.0 million KD and closed at 9,174.19 up by + 0.18%.

#### Saudi Market

The Market closed up today by + 0.60%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



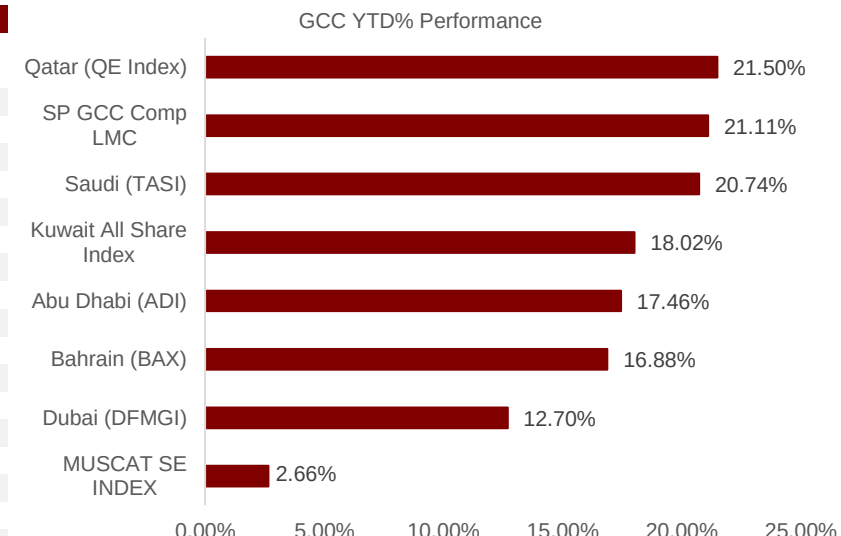
|                             | Close  | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|-----------------------------|--------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>Blue Chip Watch</b>      |        |       |       |       |       |       |               |      |       |
| <b>Kuwait</b>               |        |       |       |       |       |       |               |      |       |
| NBK                         | 1.051  | -0.76 | -0.38 | -4.37 | -4.37 | 10.69 | 7.94 KWD      | 2.00 | 27.00 |
| KFH                         | 0.995  | 0.51  | -1.19 | 2.19  | 2.19  | 31.55 | 9.24 KWD      | 4.24 | 32.00 |
| Zain                        | 0.630  | 0.16  | 2.61  | 0.32  | 0.32  | 5.88  | 2.73 KWD      | 2.29 | 14.68 |
| BOUBYAN BANK                | 0.917  | -0.22 | 0.11  | 2.54  | 2.54  | 21.88 | 3.06 KWD      | 4.29 | 34.00 |
| Agility                     | 1.227  | 0.66  | 4.16  | 11.04 | 11.04 | 29.84 | 2.74 KWD      | 1.28 | 2.64  |
| <b>Saudi Arabia</b>         |        |       |       |       |       |       |               |      |       |
| ARAMCO                      | 43.00  | 0.82  | 0.35  | -0.23 | -0.23 | 20.11 | 8,600.00 SAR  | 7.72 | 21.57 |
| SABIC                       | 129.00 | -0.15 | -4.02 | -1.53 | -1.53 | 11.21 | 387.00 SAR    | 2.15 | 35.00 |
| STC                         | 113.60 | -0.35 | -2.07 | 5.38  | 5.38  | 1.07  | 227.20 SAR    | 3.28 | 20.14 |
| AL-RAJHI BANK               | 171.40 | 1.42  | 4.26  | 6.72  | 6.72  | 20.87 | 428.50 SAR    | 6.37 | 28.65 |
| NCB                         | 75.60  | -0.40 | 5.00  | 6.63  | 6.63  | 17.39 | 338.54 SAR    | 2.07 | 21.94 |
| <b>United Arab Emirates</b> |        |       |       |       |       |       |               |      |       |
| ETISALAT.AD                 | 36.50  | -1.08 | -3.39 | -1.24 | -1.24 | 15.14 | 321.78 AED    | 6.76 | 34.07 |
| FAB.AD                      | 22.64  | -3.25 | -5.11 | -4.07 | -4.07 | 21.57 | 246.36 AED    | 2.18 | 20.53 |
| EMIRATES NBD                | 14.80  | -1.66 | 2.07  | -1.33 | -1.33 | 9.23  | 93.49 AED     | 1.12 | 10.73 |
| DB ISLAMIC BK               | 6.29   | 1.45  | 2.28  | 1.94  | 1.94  | 16.91 | 45.40 AED     | 1.17 | 11.92 |
| EMAAR PROPERT               | 6.09   | 1.50  | 0.83  | 1.50  | 1.50  | 24.54 | 49.90 AED     | 0.81 | 11.70 |
| <b>Qatar</b>                |        |       |       |       |       |       |               |      |       |
| QNB                         | 24.38  | 0.04  | 0.37  | 5.68  | 5.68  | 20.75 | 226.30 QAR    | 2.32 | 17.99 |
| INDUSTRIES QAT              | 19.80  | 1.90  | 1.02  | 4.21  | 4.21  | 27.82 | 120.38 QAR    | 3.03 | 14.81 |
| QA ISLAMIC BK               | 24.90  | -2.16 | -1.23 | 4.45  | 4.45  | 35.84 | 58.84 QAR     | 2.38 | 16.98 |
| MASRAF AL RAYA              | 5.67   | -0.63 | 2.25  | 9.75  | 9.75  | 22.28 | 53.03 QAR     | 2.16 | 24.78 |
| MESAIEED PETRO              | 2.90   | 0.00  | 0.69  | -0.34 | -0.34 | 38.76 | 36.61 QAR     | 2.13 | 19.57 |
| <b>OMAN</b>                 |        |       |       |       |       |       |               |      |       |
| BANK MUSCAT                 | 0.548  | 1.48  | 0.74  | 7.45  | 7.45  | 18.88 | 2.00 OMR      | 0.93 | 8.33  |
| OMANTEL                     | 0.892  | -0.45 | 1.36  | 1.83  | 1.83  | 18.62 | 0.67 OMR      | 1.15 | 7.69  |
| BANK DHOFAR                 | 0.117  | -1.68 | 3.54  | 1.74  | 1.74  | -7.14 | 0.35 QAR      | 0.50 | 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                    | 0.320  | -0.62 | 0.63  | -5.33 | -5.33 | 4.58  | 0.22 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 + 0.5 %The leading sector best performance indices today are Telecom 3.92 % Consumer Disc 2.11 % Industrials 0.74 % respectively

Telecommunication sector are up today by + 3.92 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 11.81 %

#### KSA

Saudi Armco has a positive performance today by + 0.82 %, SABIC have negative performance today by -0.15 %

STC have negative performance today by -0.35 %, Al Rajhi Bank has a positive performance today by + 1.42 %

#### UAE

ETISALAT .AD have negative performance today by -1.08 %, FAB.AD have negative performance today by -3.25 %



شركة الاستثمار الوطنية  
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](http://www.nic.com.kw)