



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, April 18, 2022





Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	13,733.14	0.37	0.82	4.91	4.91	21.73	12,035 SAR	2.50	22.24
Qatar (QE Index)	13,927.92	-0.48	-1.40	2.92	2.92	19.80	712 QAR	1.89	17.12
Dubai (DFMGI)	3,587.44	-0.40	-0.40	1.73	1.73	12.25	350 AED	1.61	23.63
Abu Dhabi (ADI)	9,941.22	-0.29	-0.29	-0.08	-0.08	17.12	1,435 AED	1.80	20.68
Bahrain (BAX)	2,095.91	-0.27	-0.23	1.08	1.08	16.62	21 BHD	1.25	17.46
MUSCAT SE INDEX	4,253.65	-0.11	0.34	1.15	1.15	3.01	5 OMR	0.94	13.25
SP GCC Comp LMC	230.86	0.16	0.46	3.65	3.65	21.68			

Developed Markets

MSCI World Index	2,954.15	-0.19	-0.19	-3.24	-3.24	-8.59			
U.S. (S&P 500)	4,391.69	-0.02	-0.02	-3.06	-3.06	-7.86			
U.K. (FTSE 100)	7,616.38	0.00	0.00	1.34	1.34	3.14			
Japan (Topix)	1,880.08	-0.86	-0.86	-3.41	-3.41	-5.63			

Emerging Markets

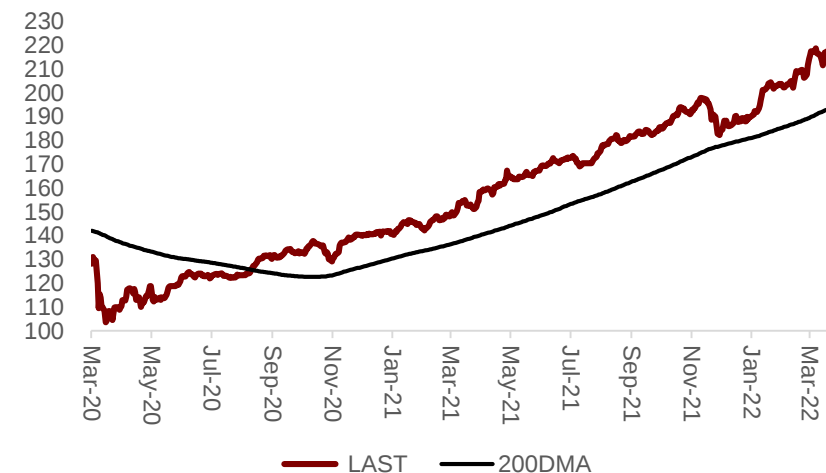
MSCI EM Index	1,106.68	-0.56	-0.56	-3.07	-3.07	-10.17			
China (SSE Composite)	3,195.52	-0.49	-0.49	-1.74	-1.74	-12.21			
India (Sensex)	57,166.74	-2.01	-2.01	-2.39	-2.39	-1.87			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	8,232.71	-0.83	-0.96	1.06	1.06	16.89	49.36 KWD	2.54	29.39
Kuwait Premier Index	9,094.66	-0.80	-0.87	0.37	0.37	19.05	37.69 KWD	2.71	30.07
Kuwait Main Index	6,474.44	-0.94	-1.29	3.51	3.51	9.99	11.67 KWD	1.99	27.24
NIC 50	10,218.90	-0.73	-0.88	0.36	0.36	19.91	28.60 KWD	2.69	29.07

Kuwait Sector

Banking	1,920.50	-0.82	-1.58	-0.50	-0.50	18.35	28.80 KWD	1.34	31.07
Telecom	1,424.97	-2.33	0.75	12.90	12.90	30.81	4.48 KWD	1.03	22.25
Industrials	1,382.38	-0.78	-0.48	6.75	6.75	21.10	4.97 KWD	1.02	25.54
Financial services	1,630.42	-0.27	0.41	-1.83	-1.83	14.55	4.20 KWD	0.93	21.06
Real estate	1,378.51	-0.95	-1.48	-1.20	-1.20	3.93	3.01 KWD	0.76	39.22
Basic materials	1,153.87	-0.01	-0.40	-0.68	-0.68	12.60	1.03 KWD	1.82	29.49
Health care	481.41	-0.93	-1.55	-2.75	-2.75	-39.60	0.24 KWD	3.05	14.57
Consumer services	702.03	-0.69	-0.21	-1.37	-1.37	-3.98	0.81 KWD	0.92	17.14
Insurance	1,528.39	-0.03	-0.87	-5.73	-5.73	-0.33	0.64 KWD	0.73	9.50
Consumer Disc	1,609.96	2.04	2.45	4.34	4.34	20.45	0.22 KWD	1.30	10.52
Energy	1,265.17	-1.79	-2.80	-2.59	-2.59	-11.41	0.27 KWD	0.89	16.34
Technology	690.40	0.00	0.85	2.04	2.04	0.96	0.01 KWD	0.82	0.00
Utilities	589.47	0.00	0.45	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 to nearly three-week highs on Monday as fears over tight global supply grew, with the deepening crisis in Ukraine raising the prospect of heavier sanctions by the West on top exporter Russia, Brent futures hit a session high of \$113.80 per barrel.

Kuwait Market

The market closed today down by – 0.83%, closed at 8,232.71 value traded 70.2 million KD, Premier market value traded reached 51.8 million KD and closed at 9,094.66 down by – 0.80%.

Saudi Market

The Market closed up today by + 0.37%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

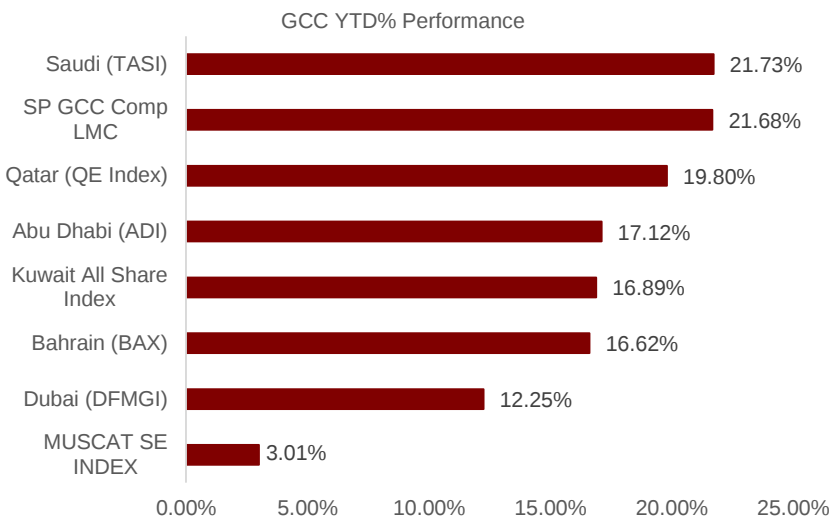


	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.039	-0.19	-1.14	-5.46	-5.46	9.42	7.87 KWD	1.98	27.00
KFH	0.976	-1.31	-1.91	0.24	0.24	29.04	9.19 KWD	4.22	32.00
Zain	0.649	-3.13	3.02	3.34	3.34	9.08	2.90 KWD	2.44	15.12
BOUBYAN BANK	0.895	-1.43	-2.40	0.08	0.08	18.96	3.03 KWD	4.25	34.00
Agility	1.205	-1.15	-1.79	9.05	9.05	27.51	2.72 KWD	1.27	2.59
Saudi Arabia									
ARAMCO	42.80	0.12	-0.47	-0.70	-0.70	19.55	8,550.00 SAR	7.68	21.62
SABIC	128.60	-0.77	-0.31	-1.83	-1.83	10.86	388.80 SAR	2.16	35.00
STC	115.00	0.17	1.23	6.68	6.68	2.31	229.60 SAR	3.31	20.28
AL-RAJHI BANK	182.60	2.82	6.53	13.70	13.70	28.77	444.00 SAR	6.60	30.11
NCB	74.70	-0.53	-1.19	5.36	5.36	15.99	336.30 SAR	2.05	21.71
United Arab Emirates									
ETISALAT.AD	36.58	-1.14	-1.14	-1.03	-1.03	15.39	321.78 AED	6.76	34.15
FAB.AD	22.32	0.09	0.09	-5.42	-5.42	19.86	246.36 AED	2.18	20.24
EMIRATES NBD	14.80	0.00	0.00	-1.33	-1.33	9.23	93.49 AED	1.12	10.73
DB ISLAMIC BK	6.18	-1.44	-1.44	0.16	0.16	14.87	45.40 AED	1.17	11.72
EMAAR PROPERT	6.10	0.00	0.00	1.67	1.67	24.74	49.90 AED	0.81	11.72
Qatar									
QNB	23.66	-0.84	-2.95	2.56	2.56	17.19	221.47 QAR	2.28	17.46
INDUSTRIES QAT	19.78	-0.80	-0.10	4.11	4.11	27.70	121.23 QAR	3.05	14.79
QA ISLAMIC BK	24.59	1.28	-1.24	3.15	3.15	34.15	57.66 QAR	2.36	16.77
MASRAF AL RAYA	5.50	-1.08	-3.07	6.38	6.38	18.53	51.96 QAR	2.11	24.02
MESAIEED PETRO	2.84	-1.63	-1.97	-2.30	-2.30	36.03	36.49 QAR	2.13	19.18
OMAN									
BANK MUSCAT	0.540	0.00	-1.46	5.88	5.88	17.15	2.06 OMR	0.96	8.33
OMANTEL	0.892	-0.45	0.00	1.83	1.83	18.62	0.67 OMR	1.16	7.69
BANK DHOFAR	0.117	0.00	0.00	1.74	1.74	-7.14	0.35 QAR	0.50	14.93
NAT BANK OF OMAN	0.212	0.00	6.00	3.41	3.41	7.61	0.34 QAR	0.61	12.71
OMINVEST	0.316	-1.25	-1.25	-6.51	-6.51	3.27	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 down today by -0.83 %The leading sector bottom performance indices today are Telecom -2.33 % Energy -1.79 % Real estate -0.95 % respectively

Telecommunication sector are down today by -2.33 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 13.92 %

KSA
Saudi Armco has a positive performance today by + 0.12 %, SABIC has a negative performance today by -0.77 %

STC has a positive performance today by + 0.17 %, Al Rajhi Bank has a positive performance today by + 2.82 %

UAE
ETISALAT .AD has a negative performance today by -1.14 %, FAB.AD has a positive performance today by + 0.09 %



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