



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, April 19, 2022





Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	13,505.57	-1.66	-0.85	3.17	3.17	19.71	12,055 SAR	2.49	21.59
Qatar (QE Index)	14,005.70	0.56	-0.85	3.49	3.49	20.47	702 QAR	1.82	17.22
Dubai (DFMGI)	3,646.18	1.64	1.24	3.39	3.39	14.09	348 AED	1.61	23.85
Abu Dhabi (ADI)	9,903.59	-0.38	-0.67	-0.45	-0.45	16.67	1,435 AED	1.80	20.68
Bahrain (BAX)	2,092.66	-0.15	-0.38	0.92	0.92	16.44	21 BHD	1.26	17.43
MUSCAT SE INDEX	4,261.99	0.20	0.54	1.35	1.35	3.21	5 OMR	0.95	13.25
SP GCC Comp LMC	227.91	-1.28	-0.82	2.32	2.32	20.12			

Developed Markets

MSCI World Index	2,984.70	1.03	0.85	-2.24	-2.24	-7.64			
U.S. (S&P 500)	4,462.21	1.61	1.58	-1.51	-1.51	-6.38			
U.K. (FTSE 100)	7,601.28	-0.20	-0.20	1.14	1.14	2.94			
Japan (Topix)	1,895.70	0.83	-0.03	-2.60	-2.60	-4.85			

Emerging Markets

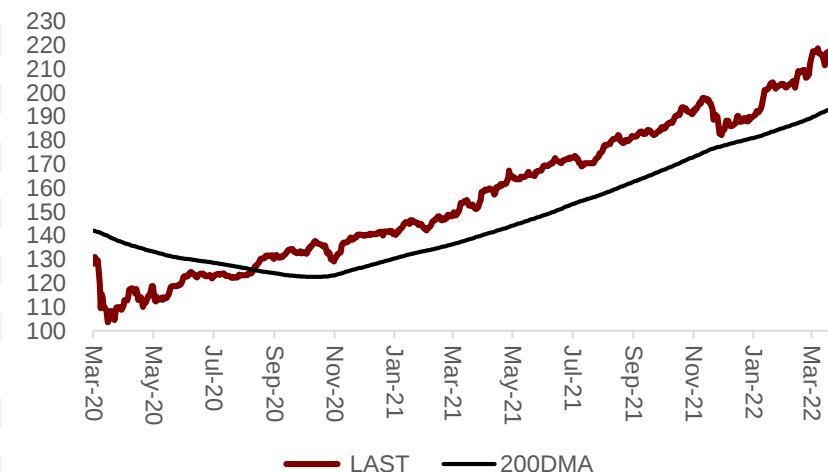
MSCI EM Index	1,096.00	-0.96	-1.52	-4.01	-4.01	-11.04			
China (SSE Composite)	3,194.03	-0.05	-0.54	-1.79	-1.79	-12.25			
India (Sensex)	56,463.15	-1.23	-3.22	-3.59	-3.59	-3.07			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	8,288.29	0.68	-0.29	1.74	1.74	17.68	48.81 KWD	2.61	29.12
Kuwait Premier Index	9,182.63	0.97	0.09	1.34	1.34	20.21	37.25 KWD	2.67	29.76
Kuwait Main Index	6,452.69	-0.34	-1.62	3.16	3.16	9.62	11.56 KWD	2.39	27.12
NIC 50	10,308.48	0.88	0.08	1.33	1.33	20.96	28.60 KWD	2.65	28.76

Kuwait Sector

Banking	1,931.74	0.59	-1.00	0.08	0.08	19.04	28.46 KWD	1.34	30.76
Telecom	1,410.98	-0.98	-0.24	11.79	11.79	29.52	4.36 KWD	1.00	20.88
Industrials	1,424.87	3.07	2.58	10.03	10.03	24.83	4.92 KWD	1.02	25.42
Financial services	1,645.90	0.95	1.36	-0.90	-0.90	15.64	4.19 KWD	0.94	21.09
Real estate	1,387.22	0.63	-0.86	-0.57	-0.57	4.58	2.97 KWD	0.75	38.92
Basic materials	1,155.96	0.18	-0.22	-0.50	-0.50	12.80	1.03 KWD	1.83	29.52
Health care	481.41	0.00	-1.55	-2.75	-2.75	-39.60	0.24 KWD	3.05	14.57
Consumer services	703.12	0.16	-0.05	-1.21	-1.21	-3.83	0.82 KWD	0.93	16.95
Insurance	1,534.56	0.40	-0.47	-5.35	-5.35	0.08	0.64 KWD	0.75	9.50
Consumer Disc	1,603.16	-0.42	2.02	3.90	3.90	19.94	0.21 KWD	1.29	10.51
Energy	1,243.11	-1.74	-4.50	-4.29	-4.29	-12.96	0.26 KWD	0.86	16.28
Technology	690.40	0.00	0.85	2.04	2.04	0.96	0.01 KWD	0.82	0.00
Utilities	586.84	-0.45	0.00	0.00	0.00	-2.19	0.25 KWD	3.97	18.95

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices slipped in volatile trading on Tuesday as investors weighed demand concerns against tight global supplies after Libya halted some exports and as factories in Shanghai prepared to reopen following a COVID-19 shutdown, Brent crude was down \$1.41, or 1.2%, to \$111.75 a barrel.

Kuwait Market

The market closed today up by + 0.68%, closed at 8,288.29 value traded 78.9 million KD, Premier market value traded reached 58.5 million KD and closed at 9,182.63 up by + 0.97%.

Saudi Market

The Market closed down today by - 1.66%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



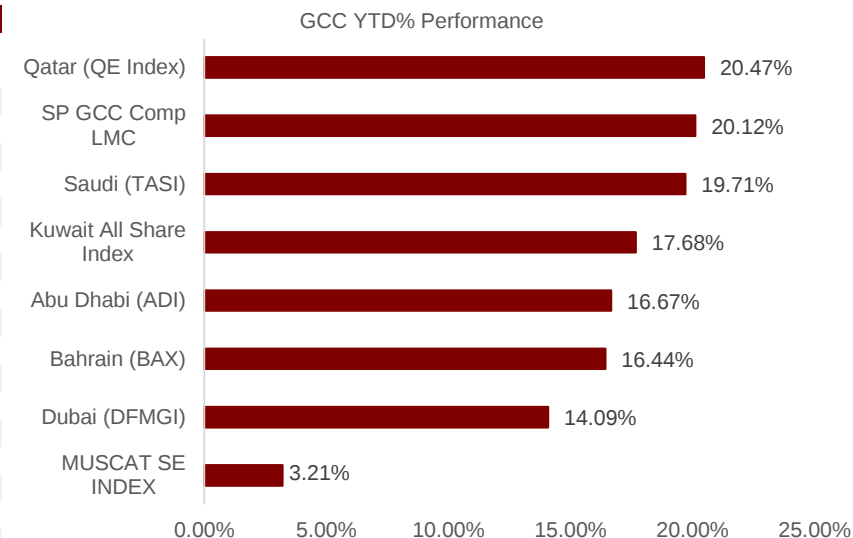
	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.042	0.29	-0.86	-5.19	-5.19	9.74	7.84 KWD	1.97	27.00
KFH	0.985	0.92	-1.01	1.17	1.17	30.23	9.05 KWD	4.16	32.00
Zain	0.655	0.92	3.97	4.30	4.30	10.08	2.80 KWD	2.36	15.26
BOUBYAN BANK	0.906	1.23	-1.20	1.31	1.31	20.42	2.98 KWD	4.18	34.00
Agility	1.248	3.57	1.71	12.94	12.94	32.06	2.68 KWD	1.26	2.69
Saudi Arabia									
ARAMCO	42.50	-0.70	-1.16	-1.39	-1.39	18.72	8,559.77 SAR	7.68	21.65
SABIC	126.60	-1.56	-1.86	-3.36	-3.36	9.14	385.79 SAR	2.14	35.00
STC	113.40	-1.39	-0.18	5.19	5.19	0.89	229.99 SAR	3.32	20.32
AL-RAJHI BANK	176.20	-3.50	2.80	9.71	9.71	24.26	456.49 SAR	6.78	30.96
NCB	73.00	-2.28	-3.44	2.96	2.96	13.35	334.50 SAR	2.04	21.59
United Arab Emirates									
ETISALAT.AD	36.10	-1.31	-2.43	-2.33	-2.33	13.88	318.13 AED	6.69	33.70
FAB.AD	22.00	-1.43	-1.35	-6.78	-6.78	18.14	246.58 AED	2.18	19.95
EMIRATES NBD	15.05	1.69	1.69	0.33	0.33	11.07	93.49 AED	1.12	10.91
DB ISLAMIC BK	6.16	-0.32	-1.75	-0.16	-0.16	14.50	44.75 AED	1.15	11.68
EMAAR PROPERT	6.24	2.30	2.30	4.00	4.00	27.61	49.90 AED	0.81	11.99
Qatar									
QNB	23.20	-1.94	-4.84	0.56	0.56	14.91	217.77 QAR	2.26	17.12
INDUSTRIES QAT	19.97	0.96	0.86	5.11	5.11	28.92	119.25 QAR	3.03	14.94
QA ISLAMIC BK	25.46	3.54	2.25	6.80	6.80	38.90	57.90 QAR	2.39	17.37
MASRAF AL RAYA	5.60	1.80	-1.32	8.30	8.30	20.67	50.97 QAR	2.09	24.45
MESAIEED PETRO	2.83	-0.35	-2.31	-2.65	-2.65	35.55	35.59 QAR	2.09	19.12
OMAN									
BANK MUSCAT	0.544	0.74	-0.73	6.67	6.67	18.02	2.03 OMR	0.94	8.33
OMANTEL	0.892	0.00	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	0.210	-0.94	5.00	2.44	2.44	6.60	0.34 QAR	0.61	12.71
OMINVEST	0.316	0.00	-1.25	-6.51	-6.51	3.27	0.21 QAR	0.92	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 + 0.68 %The leading sector best performance indices today are Industrials 3.07 % Financial services 0.95 % Real estate 0.63 % respectively

Telecommunication sector are down today by -0.98 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 11.84 %

KSA

Saudi Armco has a negative performance today by -0.7 %, SABIC has a negative performance today by -1.55 %

STC has a negative performance today by -1.39 %, Al Rajhi Bank has a negative performance today by -3.5 %

UAE

ETISALAT .AD has a negative performance today by -1.31 %, FAB.AD has a negative performance today by -1.43 %



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