

شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, April 20, 2022





Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	13,668.54	1.21	0.35	4.42	4.42	21.16	12,055 SAR	2.49	21.24
Qatar (QE Index)	14,016.00	0.07	-0.77	3.57	3.57	20.56	702 QAR	1.82	17.06
Dubai (DFMGI)	3,648.45	0.06	1.30	3.46	3.46	14.16	348 AED	1.61	23.77
Abu Dhabi (ADI)	9,988.13	0.85	0.18	0.40	0.40	17.67	1,435 AED	1.80	20.67
Bahrain (BAX)	2,095.36	0.13	-0.25	1.05	1.05	16.59	21 BHD	1.26	17.42
MUSCAT SE INDEX	4,264.44	0.06	0.59	1.41	1.41	3.27	5 OMR	0.94	13.25
SP GCC Comp LMC	229.80	0.83	0.00	3.17	3.17	21.12			

Developed Markets

MSCI World Index	2,994.64	0.33	1.18	-1.91	-1.91	-7.34			
U.S. (S&P 500)	4,459.45	-0.06	1.52	-1.57	-1.57	-6.44			
U.K. (FTSE 100)	7,629.22	0.37	0.17	1.51	1.51	3.31			
Japan (Topix)	1,915.15	1.03	0.99	-1.61	-1.61	-3.87			

Emerging Markets

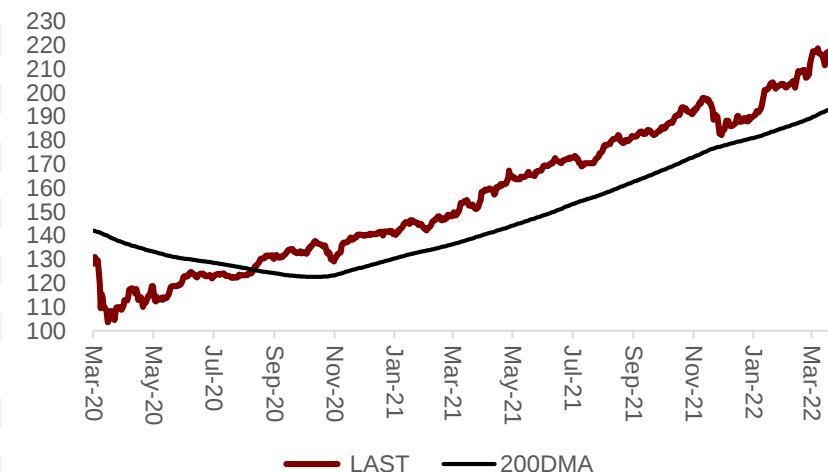
MSCI EM Index	1,095.63	-0.03	-1.55	-4.04	-4.04	-11.07			
China (SSE Composite)	3,151.05	-1.35	-1.87	-3.11	-3.11	-13.43			
India (Sensex)	57,037.50	1.02	-2.23	-2.61	-2.61	-2.09			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	8,273.13	-0.18	-0.47	1.55	1.55	17.46	48.82 KWD	2.61	29.14
Kuwait Premier Index	9,171.32	-0.12	-0.03	1.21	1.21	20.06	37.25 KWD	2.67	29.74
Kuwait Main Index	6,427.39	-0.39	-2.00	2.76	2.76	9.19	11.56 KWD	2.39	27.25
NIC 50	10,284.05	-0.24	-0.04	1.20	1.20	20.67	28.60 KWD	2.65	28.74

Kuwait Sector

Banking	1,933.89	0.11	-0.89	0.19	0.19	19.17	28.46 KWD	1.34	30.74
Telecom	1,383.10	-1.98	-2.21	9.58	9.58	26.96	4.36 KWD	1.00	19.59
Industrials	1,418.79	-0.43	2.14	9.56	9.56	24.29	4.92 KWD	1.02	25.77
Financial services	1,646.20	0.02	1.38	-0.88	-0.88	15.66	4.19 KWD	0.94	21.21
Real estate	1,385.72	-0.11	-0.97	-0.68	-0.68	4.47	2.97 KWD	0.75	47.62
Basic materials	1,148.49	-0.65	-0.87	-1.14	-1.14	12.07	1.03 KWD	1.83	29.31
Health care	481.41	0.00	-1.55	-2.75	-2.75	-39.60	0.24 KWD	3.05	14.57
Consumer services	701.77	-0.19	-0.25	-1.40	-1.40	-4.01	0.82 KWD	0.93	16.94
Insurance	1,520.67	-0.91	-1.37	-6.20	-6.20	-0.83	0.64 KWD	0.75	9.50
Consumer Disc	1,603.23	0.00	2.02	3.91	3.91	19.95	0.21 KWD	1.29	10.47
Energy	1,242.91	-0.02	-4.51	-4.30	-4.30	-12.97	0.26 KWD	0.86	16.74
Technology	694.04	0.53	1.38	2.58	2.58	1.49	0.01 KWD	0.82	0.00
Utilities	586.84	0.00	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 rebounded on Wednesday from sharp losses in the previous session as concerns about tighter supplies from Russia and Libya dominated, while industry data showed a drop in U.S. crude inventories last week, Brent crude futures rose 98 cents, or 0.9%, to \$108.23 a barrel.

Kuwait Market

The market closed today down by - 0.18%, closed at 8,273.13 value traded 74.8 million KD, Premier market value traded reached 54.3 million KD and closed at 9,171.32 down by - 0.12%.

Saudi Market

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

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



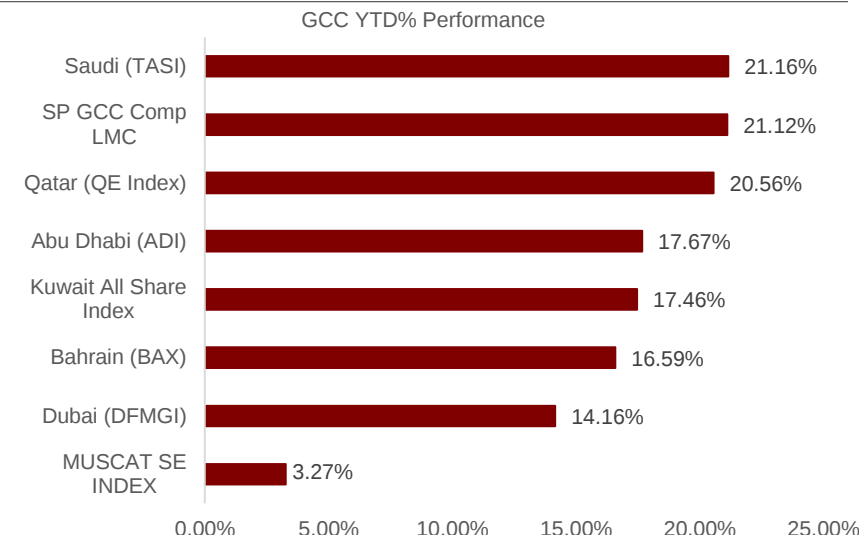
	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.036	-0.58	-1.43	-5.73	-5.73	9.11	7.84 KWD	1.97	27.00
KFH	0.985	0.00	-1.01	1.17	1.17	30.23	9.05 KWD	4.16	32.00
Zain	0.652	-0.46	3.49	3.82	3.82	9.58	2.80 KWD	2.36	15.19
BOUBYAN BANK	0.905	-0.11	-1.31	1.20	1.20	20.28	2.98 KWD	4.18	34.00
Agility	1.231	-1.36	0.33	11.40	11.40	30.26	2.68 KWD	1.26	2.65
Saudi Arabia									
ARAMCO	43.40	2.12	0.93	0.70	0.70	21.23	8,559.77 SAR	7.68	21.50
SABIC	125.00	-1.26	-3.10	-4.58	-4.58	7.76	385.79 SAR	2.14	35.00
STC	113.00	-0.35	-0.53	4.82	4.82	0.53	229.99 SAR	3.32	20.03
AL-RAJHI BANK	180.60	2.50	5.37	12.45	12.45	27.36	456.49 SAR	6.78	29.87
NCB	73.40	0.55	-2.91	3.53	3.53	13.98	334.50 SAR	2.04	21.10
United Arab Emirates									
ETISALAT.AD	35.70	-1.11	-3.51	-3.41	-3.41	12.62	318.13 AED	6.69	33.32
FAB.AD	22.80	3.64	2.24	-3.39	-3.39	22.43	246.58 AED	2.18	20.67
EMIRATES NBD	14.80	-1.66	0.00	-1.33	-1.33	9.23	93.49 AED	1.12	10.73
DB ISLAMIC BK	6.17	0.16	-1.59	0.00	0.00	14.68	44.75 AED	1.15	11.70
EMAAR PROPERT	6.32	1.28	3.61	5.33	5.33	29.24	49.90 AED	0.81	12.14
Qatar									
QNB	23.10	-0.43	-5.25	0.13	0.13	14.41	217.77 QAR	2.26	17.05
INDUSTRIES QAT	19.98	0.05	0.91	5.16	5.16	28.99	119.25 QAR	3.03	14.94
QA ISLAMIC BK	25.50	0.16	2.41	6.96	6.96	39.12	57.90 QAR	2.39	17.39
MASRAF AL RAYA	5.72	2.14	0.79	10.62	10.62	23.25	50.97 QAR	2.09	24.97
MESAIEED PETRO	2.81	-0.67	-2.97	-3.30	-3.30	34.64	35.59 QAR	2.09	18.99
OMAN									
BANK MUSCAT	0.544	0.00	-0.73	6.67	6.67	18.02	2.03 OMR	0.94	8.33
OMANTEL	0.896	0.45	0.45	2.28	2.28	19.15	0.67 OMR	1.16	7.69
BANK DHOFAR	0.115	-1.71	-1.71	0.00	0.00	-8.73	0.35 QAR	0.50	14.93
NAT BANK OF OMAN	0.215	2.38	7.50	4.88	4.88	9.14	0.34 QAR	0.61	12.71
OMINVEST	0.316	0.00	-1.25	-6.51	-6.51	3.27	0.21 QAR	0.72	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
13-Apr-22	22.10%	13.08%	0.06%	0.49%	0.36%	6.80%	2.52%	10.75%	5.49%	3.98%
20-Apr-22	22.19%	12.97%	0.06%	0.50%	0.39%	6.94%	2.47%	10.90%	5.51%	3.96%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.18 %The leading sector bottom performance indices today are Telecom -1.98 % Insurance -0.91 % Basic materials -0.65 % respectively

Telecommunication sector are down today by -1.98 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 9.5 %

KSA

Saudi Armco has a positive performance today by + 2.12 %, SABIC has a negative performance today by -1.26 %

STC has a negative performance today by -0.35 %, Al Rajhi Bank has a positive performance today by + 2.5 %

UAE

ETISALAT AD has a negative performance today by -1.11 %, FAB.AD has a positive performance today by + 3.64 %



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