



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, April 21, 2022





Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	13,534.40	-0.98	-0.64	3.39	3.39	19.97	12,036 SAR	2.45	21.95
Qatar (QE Index)	14,051.45	0.25	-0.52	3.83	3.83	20.86	706 QAR	1.79	17.13
Dubai (DFMGI)	3,682.82	0.39	1.70	3.86	3.86	14.61	358 AED	1.62	23.56
Abu Dhabi (ADI)	10,131.68	1.19	1.37	1.59	1.59	19.07	1,435 AED	1.82	20.75
Bahrain (BAX)	2,086.41	-0.43	-0.68	0.62	0.62	16.09	21 BHD	1.22	17.40
MUSCAT SE INDEX	4,235.30	-0.68	-0.09	0.72	0.72	2.56	5 OMR	0.94	13.25
SP GCC Comp LMC	228.75	-0.55	-0.55	2.60	2.60	20.43			

Developed Markets

MSCI World Index	2,882.45	-1.16	0.01	-3.05	-3.05	-8.41			
U.S. (S&P 500)	4,271.78	-1.48	0.02	-3.02	-3.02	-7.82			
U.K. (FTSE 100)	7,521.68	-0.02	0.15	1.49	1.49	3.30			
Japan (Topix)	1,905.15	0.67	1.67	-0.95	-0.95	-3.23			

Emerging Markets

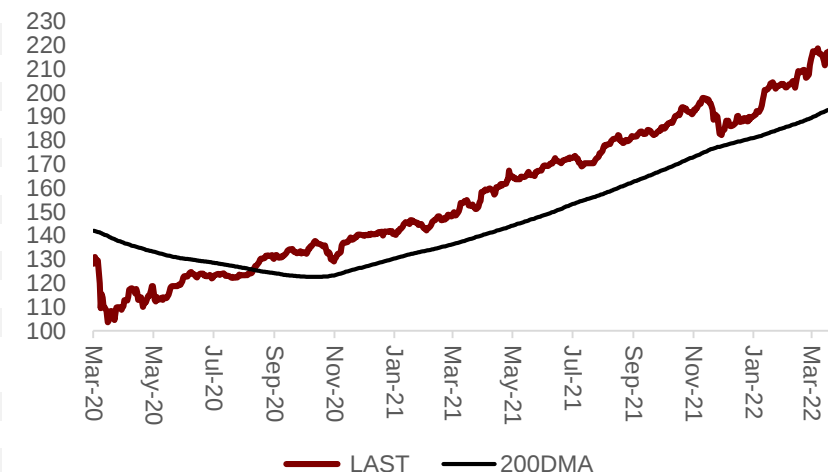
MSCI EM Index	1,075.60	-0.79	-2.33	-4.80	-4.80	-11.78			
China (SSE Composite)	3,086.92	-2.26	-4.09	-5.30	-5.30	-15.38			
India (Sensex)	57,197.15	1.53	-0.73	-1.12	-1.12	-0.59			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	8,267.20	-0.07	-0.55	1.48	1.48	17.38	49.04 KWD	2.53	28.74
Kuwait Premier Index	9,167.13	-0.05	-0.08	1.17	1.17	20.00	37.59 KWD	2.70	29.13
Kuwait Main Index	6,416.89	-0.16	-2.16	2.59	2.59	9.01	11.45 KWD	1.94	27.50
NIC 50	10,278.32	-0.06	-0.09	1.16	1.16	20.60	28.60 KWD	2.68	28.13

Kuwait Sector

Banking	1,935.08	0.06	-0.83	0.25	0.25	19.25	28.70 KWD	1.34	30.13
Telecom	1,371.91	-0.81	-3.00	8.69	8.69	25.94	4.21 KWD	0.96	18.92
Industrials	1,421.97	0.22	2.37	9.81	9.81	24.57	5.06 KWD	1.00	25.76
Financial services	1,639.89	-0.38	0.99	-1.26	-1.26	15.22	4.19 KWD	0.93	21.15
Real estate	1,378.34	-0.53	-1.50	-1.21	-1.21	3.92	2.97 KWD	0.78	47.36
Basic materials	1,146.66	-0.16	-1.03	-1.30	-1.30	11.89	1.02 KWD	1.82	29.25
Health care	481.41	0.00	-1.55	-2.75	-2.75	-39.60	0.24 KWD	3.05	14.57
Consumer services	702.47	0.10	-0.15	-1.30	-1.30	-3.92	0.82 KWD	0.91	16.97
Insurance	1,549.87	1.92	0.53	-4.40	-4.40	1.07	0.65 KWD	0.77	9.69
Consumer Disc	1,595.96	-0.45	1.56	3.43	3.43	19.40	0.21 KWD	1.30	10.47
Energy	1,250.24	0.59	-3.95	-3.74	-3.74	-12.46	0.26 KWD	0.83	16.88
Technology	694.04	0.00	1.38	2.58	2.58	1.49	0.01 KWD	0.82	0.00
Utilities	578.95	-1.34	-1.34	-1.34	-1.34	-3.51	0.24 KWD	3.90	18.69

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices traded higher but in a narrow range on Thursday, after being rocked earlier in the week by supply losses from Libya and a worrying outlook for demand as the International Monetary Fund cut its global growth forecasts, Brent crude futures rose \$1.02, or nearly 1%, to \$107.87 a barrel.

Kuwait Market

The market closed today down by – 0.07%, closed at 8,267.20 value traded 60.1 million KD, Premier market value traded reached 42.6 million KD and closed at 9,167.13 down by – 0.05%.

Saudi Market

The Market closed down today by - 0.98%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



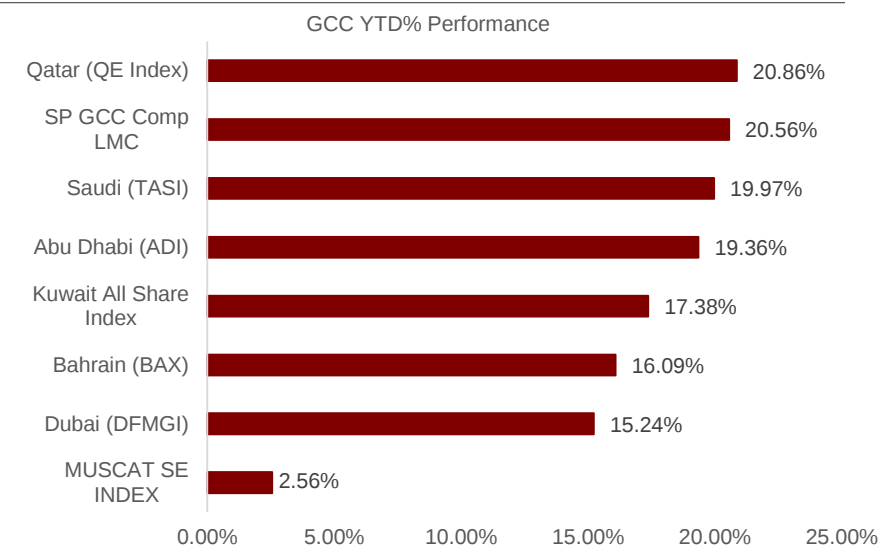
	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.043	0.68	-0.76	-5.10	-5.10	9.84	7.88 KWD	2.06	27.00
KFH	0.980	-0.51	-1.51	0.65	0.65	29.57	9.10 KWD	4.18	32.00
Zain	0.651	-0.15	3.33	3.66	3.66	9.41	2.82 KWD	2.37	15.17
BOUBAYAN BANK	0.906	0.11	-1.20	1.31	1.31	20.42	3.02 KWD	4.24	34.00
Agility	1.234	0.24	0.57	11.67	11.67	30.58	2.75 KWD	1.29	2.66
Saudi Arabia									
ARAMCO	43.00	-0.92	0.00	-0.23	-0.23	20.11	8,600.00 SAR	7.72	21.95
SABIC	125.60	0.48	-2.64	-4.12	-4.12	8.28	376.80 SAR	2.09	35.00
STC	114.00	0.88	0.35	5.75	5.75	1.42	228.00 SAR	3.29	19.96
AL-RAJHI BANK	179.80	-0.44	4.90	11.96	11.96	26.80	449.50 SAR	6.68	30.62
NCB	73.10	-0.41	-3.31	3.10	3.10	13.51	327.34 SAR	2.00	21.22
United Arab Emirates									
ETISALAT.AD	35.10	-1.68	-5.14	-5.03	-5.03	10.73	307.87 AED	6.47	32.76
FAB.AD	22.88	0.35	2.60	-3.05	-3.05	22.86	253.87 AED	2.25	20.75
EMIRATES NBD	15.00	1.35	1.35	0.00	0.00	10.70	96.01 AED	1.18	10.33
DB ISLAMIC BK	6.25	1.30	-0.32	1.30	1.30	16.17	45.54 AED	1.17	11.85
EMAAR PROPERT	6.29	-0.47	3.11	4.83	4.83	28.63	51.70 AED	0.84	12.08
Qatar									
QNB	23.30	0.87	-4.43	1.00	1.00	15.40	215.21 QAR	2.22	17.20
INDUSTRIES QAT	20.20	1.10	2.02	6.32	6.32	30.41	122.21 QAR	3.09	15.11
QA ISLAMIC BK	25.27	-0.90	1.49	6.00	6.00	37.86	59.71 QAR	2.46	17.24
MASRAF AL RAYA	5.75	0.51	1.30	11.18	11.18	23.88	53.46 QAR	2.18	25.10
MESAIEED PETRO	2.77	-1.56	-4.48	-4.81	-4.81	32.54	34.80 QAR	2.04	18.69
OMAN									
BANK MUSCAT	0.538	-1.10	-1.82	5.49	5.49	16.71	2.00 OMR	0.93	8.33
OMANTEL	0.888	-0.89	-0.45	1.37	1.37	18.09	0.67 OMR	1.16	7.69
BANK DHOFAR	0.115	0.00	-1.71	0.00	0.00	-8.73	0.34 QAR	0.49	14.93
NAT BANK OF OMAN	0.210	-2.33	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	0.72	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 -0.07 %The leading sector bottom performance indices today are Utilities -1.34 % Telecom -0.81 % Real estate -0.53 % respectively

Telecommunication sector are down today by -0.81 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 8.56 %

KSA

Saudi Armco has a negative performance today by -0.92 %, SABIC has a positive performance today by + 0.47 %

STC has a positive performance today by + 0.88 %, Al Rajhi Bank has a negative performance today by -0.44 %

UAE

ETISALAT AD has a negative performance today by -1.68 %, FAB.AD has a positive performance today by + 0.35 %



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