

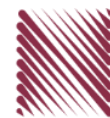


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, April 25, 2022





Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	13,543.25	0.60	0.07	3.46	3.46	20.05	12,011 SAR	2.38	21.75
Qatar (QE Index)	13,764.05	-1.59	-2.05	1.71	1.71	18.39	693 QAR	1.74	16.44
Dubai (DFMGI)	3,653.60	-0.79	-0.25	3.60	3.60	14.32	355 AED	1.60	23.51
Abu Dhabi (ADI)	10,042.96	-0.88	-0.63	0.95	0.95	18.31	1,435 AED	1.82	21.05
Bahrain (BAX)	2,067.98	-0.57	-0.88	-0.27	-0.27	15.06	21 BHD	1.21	17.38
MUSCAT SE INDEX	4,194.90	-0.58	-0.95	-0.25	-0.25	1.58	5 OMR	0.94	13.25
SP GCC Comp LMC	228.59	0.25	0.03	2.63	2.63	20.48			

Developed Markets

MSCI World Index	2,877.70	-0.16	-2.78	-5.74	-5.74	-10.95			
U.S. (S&P 500)	4,296.12	0.57	-2.22	-5.17	-5.17	-9.86			
U.K. (FTSE 100)	7,380.54	-1.88	-3.24	-1.80	-1.80	-0.05			
Japan (Topix)	1,876.52	-1.50	-2.67	-3.59	-3.59	-5.81			

Emerging Markets

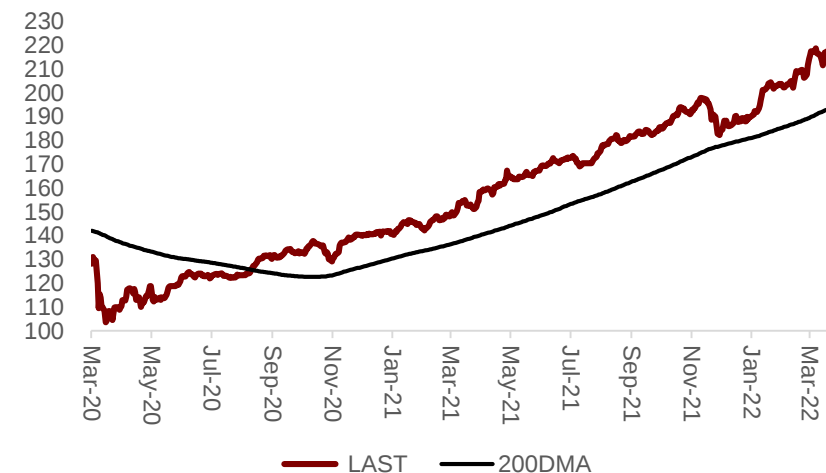
MSCI EM Index	1,046.04	-2.75	-3.76	-8.39	-8.39	-15.09			
China (SSE Composite)	2,928.51	-5.13	-4.91	-9.95	-9.95	-19.54			
India (Sensex)	56,579.89	-1.08	-2.30	-3.40	-3.40	-2.87			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	8,329.78	1.13	0.76	2.25	2.25	18.27	49.47 KWD	2.69	29.54
Kuwait Premier Index	9,242.97	1.10	0.83	2.00	2.00	21.00	37.96 KWD	2.90	29.95
Kuwait Main Index	6,449.55	1.21	0.51	3.11	3.11	9.57	11.51 KWD	1.96	28.25
NIC 50	10,368.18	1.13	0.82	1.99	1.99	21.66	28.60 KWD	2.88	28.95

Kuwait Sector

Banking	1,955.61	1.44	1.06	1.32	1.32	20.51	29.05 KWD	1.33	30.95
Telecom	1,389.39	1.65	1.27	10.08	10.08	27.54	4.26 KWD	1.00	19.68
Industrials	1,418.22	0.43	-0.26	9.52	9.52	24.24	5.05 KWD	0.99	26.25
Financial services	1,644.20	0.56	0.26	-1.00	-1.00	15.52	4.20 KWD	0.91	20.92
Real estate	1,379.64	0.51	0.09	-1.12	-1.12	4.01	2.98 KWD	0.78	47.38
Basic materials	1,146.65	0.00	0.00	-1.30	-1.30	11.89	1.02 KWD	1.84	29.21
Health care	485.95	0.00	0.94	-1.83	-1.83	-39.03	0.24 KWD	3.05	15.00
Consumer services	709.90	0.97	1.06	-0.26	-0.26	-2.90	0.83 KWD	0.92	16.86
Insurance	1,548.96	0.04	-0.06	-4.46	-4.46	1.02	0.65 KWD	0.77	9.69
Consumer Disc	1,608.09	0.51	0.76	4.22	4.22	20.31	0.22 KWD	1.30	10.65
Energy	1,234.63	-0.35	-1.25	-4.94	-4.94	-13.55	0.26 KWD	0.83	16.56
Technology	694.04	0.00	0.00	2.58	2.58	1.49	0.01 KWD	0.82	0.00
Utilities	584.21	0.00	0.91	-0.45	-0.45	-2.63	0.24 KWD	3.94	18.86

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

SINGAPORE — Mainland Chinese stocks struggled for direction Tuesday, wavering between gains and losses as Covid fears took hold with Beijing expanding mass testing, U.S. crude futures traded 0.84% higher to \$99.38 per barrel.

Kuwait Market

The market closed today up by + 1.13%, closed at 8,329.78 value traded 52.6 million KD, Premier market value traded reached 34.4 million KD and closed at 9,242.97 up by + 1.10%.

Saudi Market

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

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



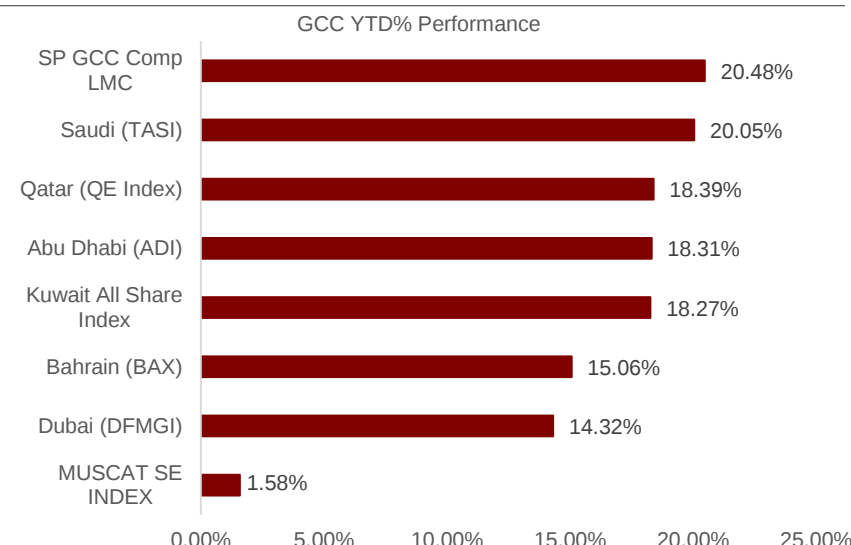
	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.055	0.67	1.15	-4.00	-4.00	11.11	7.97 KWD	2.08	27.00
KFH	0.987	1.13	0.71	1.37	1.37	30.49	9.17 KWD	4.81	32.00
Zain	0.650	0.00	-0.15	3.50	3.50	9.24	2.81 KWD	2.48	15.14
BOUBAYAN BANK	0.966	4.43	6.62	8.02	8.02	28.39	3.23 KWD	4.53	34.00
Agility	1.229	0.16	-0.41	11.22	11.22	30.05	2.74 KWD	1.29	2.65
Saudi Arabia									
ARAMCO	42.90	-0.23	-0.23	-0.46	-0.46	19.83	8,581.37 SAR	7.70	21.75
SABIC	121.00	-3.35	-3.66	-7.63	-7.63	4.31	363.06 SAR	2.02	35.00
STC	112.20	0.00	-1.58	4.08	4.08	-0.18	224.44 SAR	3.23	19.82
AL-RAJHI BANK	183.60	2.11	2.11	14.32	14.32	29.48	459.07 SAR	6.82	30.48
NCB	73.30	-0.27	0.27	3.39	3.39	13.82	328.29 SAR	2.00	21.24
United Arab Emirates									
ETISALAT.AD	35.24	-0.45	0.40	-4.65	-4.65	11.17	306.47 AED	6.44	32.89
FAB.AD	22.50	-2.09	-1.66	-4.66	-4.66	20.82	248.57 AED	2.20	20.40
EMIRATES NBD	15.10	-0.66	0.67	0.67	0.67	11.44	95.38 AED	1.17	10.40
DB ISLAMIC BK	6.24	-0.79	-0.16	1.13	1.13	15.99	45.18 AED	1.16	11.83
EMAAR PROPERT	6.27	-0.79	-0.32	4.50	4.50	28.22	51.29 AED	0.83	12.05
Qatar									
QNB	23.19	0.13	-0.47	0.52	0.52	14.86	213.89 QAR	2.21	17.11
INDUSTRIES QAT	19.69	-1.35	-2.52	3.63	3.63	27.11	118.96 QAR	3.02	14.73
QA ISLAMIC BK	24.40	-2.63	-3.44	2.35	2.35	33.12	57.57 QAR	2.37	16.64
MASRAF AL RAYA	5.69	-1.56	-1.01	10.06	10.06	22.63	52.84 QAR	2.16	24.85
MESAIEED PETRO	2.67	-2.45	-3.50	-8.14	-8.14	27.89	33.53 QAR	1.97	18.04
OMAN									
BANK MUSCAT	0.526	-2.59	-2.23	3.14	3.14	14.11	1.99 OMR	0.92	8.33
OMANTEL	0.860	-2.71	-3.15	-1.83	-1.83	14.36	0.67 OMR	1.15	7.69
BANK DHOFAR	0.118	2.61	2.61	2.61	2.61	-6.35	0.35 QAR	0.50	14.93
NAT BANK OF OMAN	0.200	-1.96	-4.76	-2.44	-2.44	1.52	0.33 QAR	0.59	12.71
OMINVEST	0.314	-0.63	-0.63	-7.10	-7.10	2.61	0.21 QAR	0.71	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, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 1.13 %The leading sector best performance indices today are Telecom 1.65 % Banking 1.44 % Consumer services 0.97 % respectively

Telecommunication sector are up today by + 1.65 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 9.27 %

KSA

Saudi Armco have negative performance today by -0.23 %, SABIC have negative performance today by -3.35 %

STC flat performance today 0 %, Al Rajhi Bank has a positive performance today by + 2.11 %

UAE

ETISALAT AD have negative performance today by -0.45 %, FAB.AD have negative performance today by -2.09 %



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