



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Tuesday, April 26, 2022





### Market Watch

| Description        | Close     | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|--------------------|-----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>GCC Markets</b> |           | %     | %     | %     | %     | %     |               |      |       |
| Saudi (TASI)       | 13,503.49 | -0.29 | -0.23 | 3.16  | 3.16  | 19.69 | 12,096 SAR    | 2.39 | 21.70 |
| Qatar (QE Index)   | 13,770.08 | 0.04  | -2.00 | 1.75  | 1.75  | 18.44 | 691 QAR       | 1.75 | 16.37 |
| Dubai (DFMGI)      | 3,665.86  | 0.34  | 0.08  | 3.95  | 3.95  | 14.70 | 357 AED       | 1.66 | 24.21 |
| Abu Dhabi (ADI)    | 10,041.27 | -0.02 | -0.65 | 0.93  | 0.93  | 18.29 | 1,435 AED     | 1.82 | 21.03 |
| Bahrain (BAX)      | 2,059.30  | -0.42 | -1.30 | -0.69 | -0.69 | 14.58 | 21 BHD        | 1.21 | 17.36 |
| MUSCAT SE INDEX    | 4,182.51  | -0.30 | -1.25 | -0.54 | -0.54 | 1.28  | 5 OMR         | 0.95 | 13.25 |
| SP GCC Comp LMC    | 227.82    | -0.34 | -0.31 | 2.28  | 2.28  | 20.07 |               |      |       |

### Developed Markets

|                  |          |       |       |       |       |        |  |  |  |
|------------------|----------|-------|-------|-------|-------|--------|--|--|--|
| MSCI World Index | 2,811.00 | -2.32 | -5.03 | -7.93 | -7.93 | -13.02 |  |  |  |
| U.S. (S&P 500)   | 4,175.20 | -2.81 | -4.97 | -7.84 | -7.84 | -12.40 |  |  |  |
| U.K. (FTSE 100)  | 7,386.19 | 0.08  | -3.17 | -1.72 | -1.72 | 0.02   |  |  |  |
| Japan (Topix)    | 1,878.51 | 0.11  | -2.57 | -3.49 | -3.49 | -5.71  |  |  |  |

### Emerging Markets

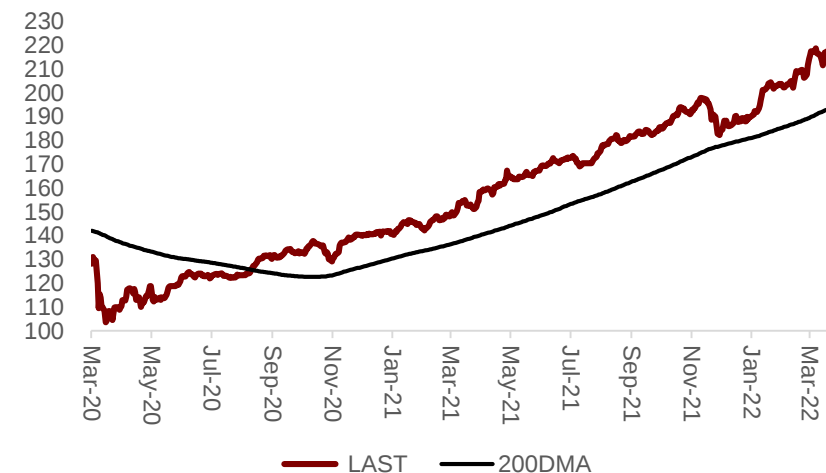
|                       |           |       |       |        |        |        |  |  |  |
|-----------------------|-----------|-------|-------|--------|--------|--------|--|--|--|
| MSCI EM Index         | 1,049.39  | 0.32  | -3.45 | -8.09  | -8.09  | -14.82 |  |  |  |
| China (SSE Composite) | 2,886.43  | -1.44 | -6.28 | -11.25 | -11.25 | -20.70 |  |  |  |
| India (Sensex)        | 57,356.61 | 1.37  | -0.96 | -2.07  | -2.07  | -1.54  |  |  |  |

| Description            | Close     | Day Δ | WTD  | MTD  | QTD  | YTD   | M Cap (in Bn) | PBV  | PE    |
|------------------------|-----------|-------|------|------|------|-------|---------------|------|-------|
| <b>Kuwait</b>          |           | %     | %    | %    | %    | %     |               |      |       |
| Kuwait All Share Index | 8,346.98  | 0.21  | 0.97 | 2.46 | 2.46 | 18.51 | 49.56 KWD     | 2.69 | 29.24 |
| Kuwait Premier Index   | 9,279.86  | 0.40  | 1.23 | 2.41 | 2.41 | 21.48 | 38.08 KWD     | 2.92 | 30.15 |
| Kuwait Main Index      | 6,418.95  | -0.47 | 0.03 | 2.63 | 2.63 | 9.05  | 11.47 KWD     | 1.93 | 26.27 |
| NIC 50                 | 10,399.41 | 0.30  | 1.22 | 2.40 | 2.40 | 22.02 | 28.60 KWD     | 2.90 | 29.15 |

### Kuwait Sector

|                    |          |       |       |       |       |        |           |      |       |
|--------------------|----------|-------|-------|-------|-------|--------|-----------|------|-------|
| Banking            | 1,958.49 | 0.15  | 1.21  | 1.47  | 1.47  | 20.69  | 29.07 KWD | 1.34 | 31.15 |
| Telecom            | 1,386.11 | -0.24 | 1.04  | 9.82  | 9.82  | 27.24  | 4.25 KWD  | 1.03 | 19.05 |
| Industrials        | 1,423.83 | 0.40  | 0.13  | 9.95  | 9.95  | 24.73  | 5.07 KWD  | 0.99 | 26.43 |
| Financial services | 1,654.73 | 0.64  | 0.90  | -0.37 | -0.37 | 16.26  | 4.24 KWD  | 0.92 | 21.32 |
| Real estate        | 1,384.93 | 0.38  | 0.48  | -0.74 | -0.74 | 4.41   | 2.99 KWD  | 0.77 | 46.46 |
| Basic materials    | 1,156.93 | 0.90  | 0.90  | -0.41 | -0.41 | 12.90  | 1.03 KWD  | 1.80 | 18.96 |
| Health care        | 485.95   | 0.00  | 0.94  | -1.83 | -1.83 | -39.03 | 0.24 KWD  | 3.05 | 15.00 |
| Consumer services  | 706.13   | -0.53 | 0.52  | -0.79 | -0.79 | -3.42  | 0.82 KWD  | 0.91 | 16.90 |
| Insurance          | 1,538.92 | -0.65 | -0.71 | -5.08 | -5.08 | 0.36   | 0.64 KWD  | 0.75 | 9.69  |
| Consumer Disc      | 1,605.73 | -0.15 | 0.61  | 4.07  | 4.07  | 20.13  | 0.22 KWD  | 1.29 | 10.60 |
| Energy             | 1,263.47 | 2.34  | 1.06  | -2.72 | -2.72 | -11.53 | 0.26 KWD  | 0.81 | 17.14 |
| Technology         | 659.84   | -4.93 | -4.93 | -2.47 | -2.47 | -3.51  | 0.01 KWD  | 0.78 | 0.00  |
| Utilities          | 584.21   | 0.00  | 0.91  | -0.45 | -0.45 | -2.63  | 0.24 KWD  | 4.18 | 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 + 0.21%, closed at 8,346.98 value traded 67.5 million KD, Premier market value traded reached 42.8 million KD and closed at 9,279.86 up by + 0.40%.

#### Saudi Market

The Market closed down today by - 0.29%, and the current macroeconomic sentiments and volatility of oil prices linked by geopolitical tension .

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



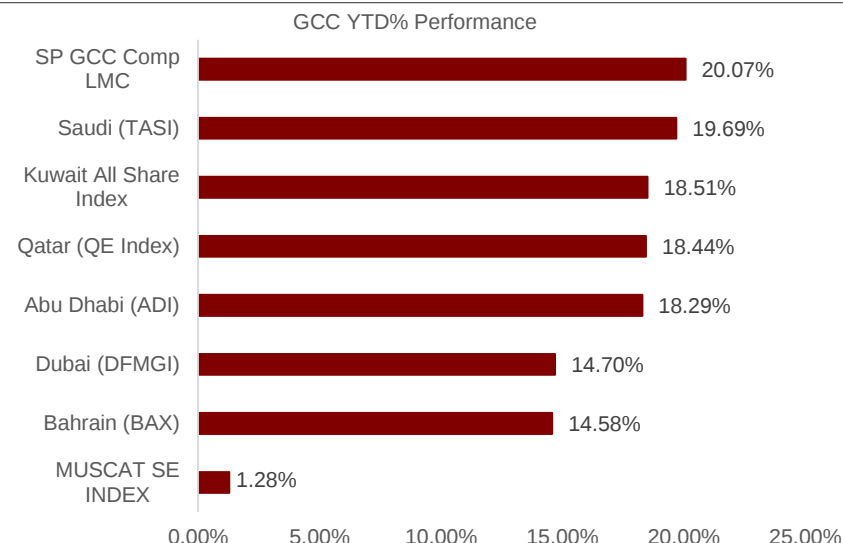
|                             | Close  | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|-----------------------------|--------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>Blue Chip Watch</b>      |        | %     | %     | %     | %     | %     |               |      |       |
| <b>Kuwait</b>               |        |       |       |       |       |       |               |      |       |
| NBK                         | 1.058  | 0.28  | 1.44  | -3.73 | -3.73 | 11.42 | 7.99 KWD      | 2.09 | 27.00 |
| KFH                         | 0.990  | 0.30  | 1.02  | 1.68  | 1.68  | 30.89 | 9.19 KWD      | 4.82 | 32.00 |
| Zain                        | 0.654  | 0.62  | 0.46  | 4.14  | 4.14  | 9.92  | 2.83 KWD      | 2.50 | 15.02 |
| BOUBAYAN BANK               | 0.978  | 1.24  | 7.95  | 9.36  | 9.36  | 29.99 | 3.27 KWD      | 4.58 | 34.00 |
| Agility                     | 1.238  | 0.73  | 0.32  | 12.04 | 12.04 | 31.01 | 2.76 KWD      | 1.29 | 2.67  |
| <b>Saudi Arabia</b>         |        |       |       |       |       |       |               |      |       |
| ARAMCO                      | 43.35  | 1.05  | 0.81  | 0.58  | 0.58  | 21.09 | 8,670.00 SAR  | 7.78 | 21.70 |
| SABIC                       | 125.20 | 3.47  | -0.32 | -4.43 | -4.43 | 7.93  | 375.60 SAR    | 2.09 | 35.00 |
| STC                         | 112.00 | -0.18 | -1.75 | 3.90  | 3.90  | -0.36 | 224.00 SAR    | 3.23 | 19.82 |
| AL-RAJHI BANK               | 181.00 | -1.42 | 0.67  | 12.70 | 12.70 | 27.64 | 452.50 SAR    | 6.72 | 31.13 |
| NCB                         | 72.00  | -1.77 | -1.50 | 1.55  | 1.55  | 11.80 | 322.42 SAR    | 1.97 | 21.19 |
| <b>United Arab Emirates</b> |        |       |       |       |       |       |               |      |       |
| ETISALAT.AD                 | 35.00  | -0.68 | -0.28 | -5.30 | -5.30 | 10.41 | 304.40 AED    | 6.22 | 32.38 |
| FAB.AD                      | 22.50  | 0.00  | -1.66 | -4.66 | -4.66 | 20.82 | 248.58 AED    | 2.20 | 20.40 |
| EMIRATES NBD                | 15.15  | 0.33  | 1.00  | 1.00  | 1.00  | 11.81 | 95.70 AED     | 1.17 | 10.44 |
| DB ISLAMIC BK               | 6.29   | 0.80  | 0.64  | 1.94  | 1.94  | 16.91 | 45.55 AED     | 1.17 | 11.92 |
| EMAAR PROPERT               | 6.31   | 0.64  | 0.32  | 5.17  | 5.17  | 29.04 | 51.62 AED     | 0.84 | 12.12 |
| <b>Qatar</b>                |        |       |       |       |       |       |               |      |       |
| QNB                         | 23.25  | 0.26  | -0.21 | 0.78  | 0.78  | 15.16 | 213.99 QAR    | 2.22 | 17.16 |
| INDUSTRIES QAT              | 19.23  | -2.34 | -4.80 | 1.21  | 1.21  | 24.14 | 115.93 QAR    | 2.95 | 12.47 |
| QA ISLAMIC BK               | 24.64  | 0.98  | -2.49 | 3.36  | 3.36  | 34.42 | 58.02 QAR     | 2.39 | 16.81 |
| MASRAF AL RAYA              | 5.72   | 0.60  | -0.42 | 10.72 | 10.72 | 23.36 | 53.05 QAR     | 2.18 | 25.00 |
| MESAIEED PETRO              | 2.69   | 0.45  | -3.07 | -7.73 | -7.73 | 28.47 | 33.61 QAR     | 1.98 | 17.51 |
| <b>OMAN</b>                 |        |       |       |       |       |       |               |      |       |
| BANK MUSCAT                 | 0.528  | 0.38  | -1.86 | 3.53  | 3.53  | 14.55 | 1.99 OMR      | 0.92 | 8.33  |
| OMANTEL                     | 0.876  | 1.86  | -1.35 | 0.00  | 0.00  | 16.49 | 0.66 OMR      | 1.13 | 7.69  |
| BANK DHOFAR                 | 0.118  | 0.00  | 2.61  | 2.61  | 2.61  | -6.35 | 0.35 QAR      | 0.50 | 14.93 |
| NAT BANK OF OMAN            | 0.198  | -1.00 | -5.71 | -3.41 | -3.41 | 0.51  | 0.33 QAR      | 0.59 | 12.71 |
| OMINVEST                    | 0.314  | 0.00  | -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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### Leading Sector, Security Performance

#### Kuwait

The market is up today by + 0.21 %The leading sector best performance indices today are Energy 2.34 % Basic materials 0.9 % Financial services 0.64 % respectively

Telecommunication sector are down today by -0.24 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 8.73 %

#### KSA

Saudi Armco has a positive performance today by + 1.05 %, SABIC has a positive performance today by + 3.47 %

STC has a negative performance today by -0.18 %, Al Rajhi Bank has a negative performance today by -1.42 %

#### UAE

ETISALAT AD have negative performance today by -0.68 %, FAB.AD flat performance today



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