



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

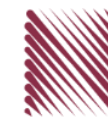
GCC DAILY MORNING BRIEF

Wednesday, April 27, 2022



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

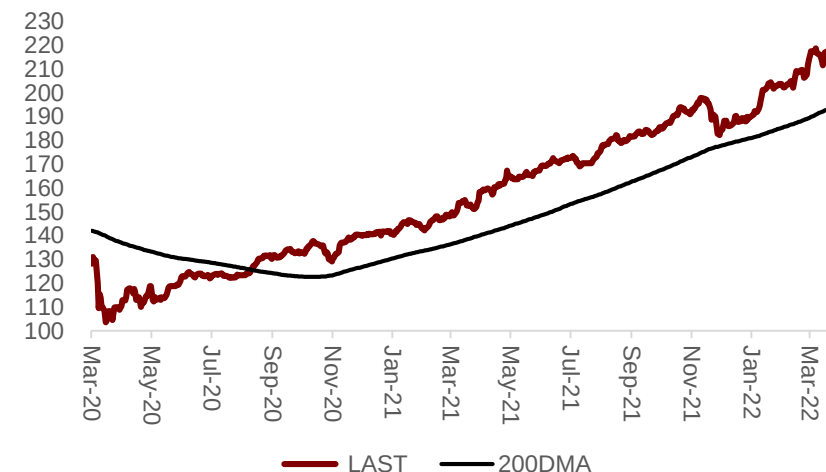


Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
GCC Markets									
Saudi (TASI)	13,643.91	1.04	0.81	4.23	4.23	20.94	12,336 SAR	2.43	21.91
Qatar (QE Index)	13,613.25	-1.14	-3.12	0.59	0.59	17.10	689 QAR	1.78	16.24
Dubai (DFMGI)	3,687.69	0.60	0.68	4.57	4.57	15.39	358 AED	1.72	24.74
Abu Dhabi (ADI)	10,025.25	-0.16	-0.81	0.77	0.77	18.11	1,435 AED	1.82	19.44
Bahrain (BAX)	2,038.12	-1.03	-2.31	-1.71	-1.71	13.40	21 BHD	1.27	17.35
MUSCAT SE INDEX	4,161.34	-0.51	-1.75	-1.04	-1.04	0.77	5 OMR	0.94	13.25
SP GCC Comp LMC	228.66	0.37	0.06	2.66	2.66	20.52			
Developed Markets									
MSCI World Index	2,807.51	-0.12	-5.15	-8.04	-8.04	-13.13			
U.S. (S&P 500)	4,183.96	0.21	-4.77	-7.65	-7.65	-12.22			
U.K. (FTSE 100)	7,425.61	0.53	-2.65	-1.20	-1.20	0.56			
Japan (Topix)	1,860.76	-0.94	-3.49	-4.40	-4.40	-6.60			
Emerging Markets									
MSCI EM Index	1,043.74	-0.54	-3.97	-8.59	-8.59	-15.28			
China (SSE Composite)	2,958.28	2.49	-3.95	-9.04	-9.04	-18.72			
India (Sensex)	56,819.39	-0.94	-1.89	-2.99	-2.99	-2.46			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Kuwait									
Kuwait All Share Index	8,318.33	-0.34	0.62	2.11	2.11	18.11	49.47 KWD	2.68	28.18
Kuwait Premier Index	9,262.65	-0.19	1.04	2.22	2.22	21.25	38.07 KWD	2.90	29.91
Kuwait Main Index	6,360.81	-0.91	-0.87	1.70	1.70	8.06	11.40 KWD	1.93	22.45
NIC 50	10,371.73	-0.27	1.03	2.21	2.21	21.70	28.60 KWD	2.88	28.91
Kuwait Sector									
Banking	1,950.06	-0.43	0.77	1.03	1.03	20.17	28.98 KWD	1.34	30.91
Telecom	1,397.12	0.79	1.84	10.69	10.69	28.25	4.29 KWD	1.01	18.50
Industrials	1,421.09	-0.19	-0.06	9.74	9.74	24.49	5.07 KWD	0.99	25.84
Financial services	1,647.78	-0.42	0.48	-0.78	-0.78	15.77	4.25 KWD	0.91	18.24
Real estate	1,374.50	-0.75	-0.28	-1.49	-1.49	3.63	2.97 KWD	0.77	47.07
Basic materials	1,153.49	-0.30	0.60	-0.71	-0.71	12.56	1.03 KWD	1.82	18.87
Health care	485.95	0.00	0.94	-1.83	-1.83	-39.03	0.24 KWD	3.05	15.00
Consumer services	704.72	-0.20	0.32	-0.99	-0.99	-3.61	0.82 KWD	0.91	15.16
Insurance	1,491.89	-3.06	-3.74	-7.98	-7.98	-2.71	0.62 KWD	0.74	9.69
Consumer Disc	1,600.06	-0.35	0.26	3.70	3.70	19.71	0.22 KWD	1.29	10.60
Energy	1,261.76	-0.14	0.92	-2.85	-2.85	-11.65	0.26 KWD	0.82	17.20
Technology	654.75	-0.77	-5.66	-3.23	-3.23	-4.26	0.01 KWD	0.78	0.00
Utilities	581.58	-0.45	0.45	-0.90	-0.90	-3.07	0.24 KWD	4.16	17.97

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices extended gains in early Asian trade on Wednesday amid simmering geopolitical tensions as Russia cut gas supplies to Poland, while hopes of Chinese economic stimulus buoyed the demand outlook, Brent crude futures rose 21 cents, or 0.2%, to \$105.20 per barrel.

Kuwait Market

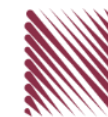
The market closed today down by - 0.34%, closed at 8,318.33 value traded 68.8 million KD, Premier market value traded reached 39.8 million KD and closed at 9,262.65 down by - 0.19%.

Saudi Market

The Market closed up today by + 1.04%, and the current macroeconomic sentiments and volatility of oil prices linked by geopolitical tension .

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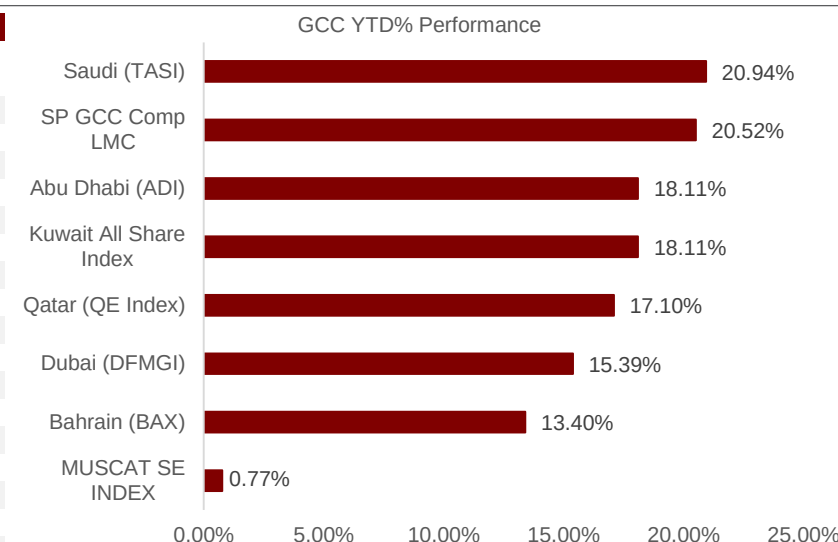
	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.056	-0.19	1.25	-3.91	-3.91	11.21	7.99 KWD	2.08	27.00
KFH	0.984	-0.61	0.41	1.06	1.06	30.10	9.15 KWD	4.79	32.00
Zain	0.670	2.45	2.92	6.69	6.69	12.61	2.90 KWD	2.56	15.39
BOUBAYAN BANK	0.971	-0.72	7.17	8.58	8.58	29.06	3.25 KWD	4.55	34.00
Agility	1.242	0.32	0.65	12.40	12.40	31.43	2.77 KWD	1.30	2.67
Saudi Arabia									
ARAMCO	44.35	2.31	3.14	2.90	2.90	23.88	8,869.76 SAR	7.96	21.93
SABIC	129.00	3.04	2.71	-1.53	-1.53	11.21	386.99 SAR	2.15	35.00
STC	113.40	1.25	-0.53	5.19	5.19	0.89	226.79 SAR	3.27	19.79
AL-RAJHI BANK	179.00	-1.10	-0.44	11.46	11.46	26.23	447.49 SAR	6.65	30.69
NCB	75.00	4.17	2.60	5.78	5.78	16.46	335.84 SAR	2.05	20.81
United Arab Emirates									
ETISALAT.AD	34.46	-1.54	-1.82	-6.76	-6.76	8.71	299.68 AED	6.13	31.88
FAB.AD	22.56	0.27	-1.40	-4.41	-4.41	21.14	249.22 AED	2.21	20.46
EMIRATES NBD	15.25	0.66	1.67	1.67	1.67	12.55	96.32 AED	1.18	10.51
DB ISLAMIC BK	6.34	0.79	1.44	2.76	2.76	17.84	45.90 AED	1.18	12.02
EMAAR PROPERT	6.34	0.48	0.79	5.67	5.67	29.65	51.86 AED	0.84	12.18
Qatar									
QNB	23.25	0.00	-0.21	0.78	0.78	15.16	215.66 QAR	2.22	17.16
INDUSTRIES QAT	18.70	-2.76	-7.43	-1.58	-1.58	20.72	113.61 QAR	3.13	12.13
QA ISLAMIC BK	24.48	-0.65	-3.13	2.68	2.68	33.55	58.09 QAR	2.38	16.70
MASRAF AL RAYA	5.69	-0.63	-1.04	10.02	10.02	22.59	53.12 QAR	2.16	24.84
MESAIEED PETRO	2.59	-3.58	-6.53	-11.03	-11.03	23.88	32.66 QAR	2.02	16.89
OMAN									
BANK MUSCAT	0.526	-0.38	-2.23	3.14	3.14	14.11	1.97 OMR	0.94	8.33
OMANTEL	0.844	-3.65	-4.95	-3.65	-3.65	12.23	0.65 OMR	1.12	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	0.200	1.01	-4.76	-2.44	-2.44	1.52	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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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.34 %The leading sector bottom performance indices today are Insurance -3.06 % Technology -0.77 % Real estate -0.75 % respectively

Telecommunication sector are up today by + 0.79 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 10.14 %

KSA

Saudi Armco has a positive performance today by + 2.31 %, SABIC have positive performance today by + 3.03 %

STC has a positive performance today by + 1.25 %, Al Rajhi Bank have negative performance today by -1.1 %

UAE

ETISALAT .AD have negative performance today by -1.54 %, FAB.AD has a positive performance today by + 0.27 %



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