



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Sunday, April 3, 2022



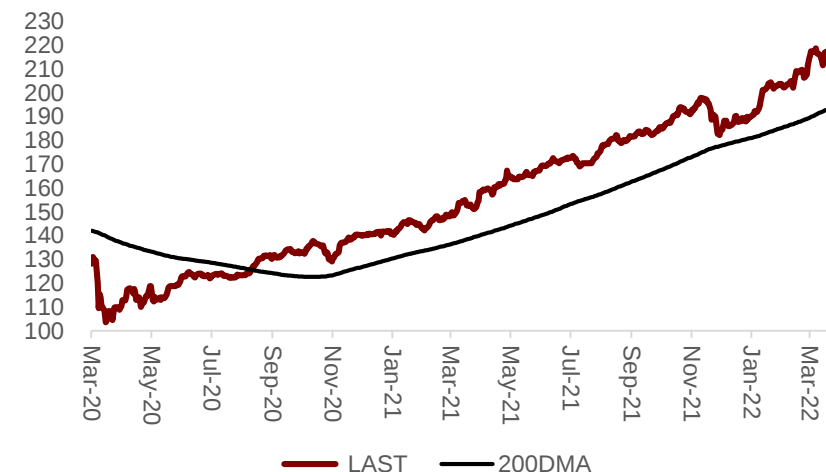


### Market Watch

| Description              | Close     | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|--------------------------|-----------|-------|-------|-------|-------|-------|---------------|------|-------|
|                          |           | %     | %     | %     | %     | %     |               |      |       |
| <b>GCC Markets</b>       |           |       |       |       |       |       |               |      |       |
| Saudi (TASI)             | 13,082.76 | -0.06 | -0.06 | -0.06 | -0.06 | 15.96 | 11,929 SAR    | 2.48 | 20.80 |
| Qatar (QE Index)         | 13,513.56 | -0.14 | -0.14 | -0.14 | -0.14 | 16.24 | 698 QAR       | 1.82 | 16.87 |
| Dubai (DFMGI)            | 3,536.65  | 0.28  | 3.95  | 0.28  | 0.28  | 10.66 | 346 AED       | 1.44 | 21.59 |
| Abu Dhabi (ADI)          | 9,928.69  | -0.20 | 3.04  | -0.20 | -0.20 | 16.97 | 1,435 AED     | 1.76 | 20.33 |
| Bahrain (BAX)            | 2,084.28  | 0.52  | 0.52  | 0.52  | 0.52  | 15.97 | 21 BHD        | 1.19 | 17.55 |
| MUSCAT SE INDEX          | 4,124.94  | -1.91 | -1.91 | -1.91 | -1.91 | -0.11 | 5 OMR         | 0.91 | 13.25 |
| SP GCC Comp LMC          | 222.33    | -0.19 | -0.16 | -0.19 | -0.19 | 17.18 |               |      |       |
| <b>Developed Markets</b> |           |       |       |       |       |       |               |      |       |
| MSCI World Index         | 3,057.07  | 0.13  | 7.64  | 0.13  | 0.13  | -5.40 |               |      |       |
| U.S. (S&P 500)           | 4,545.86  | 0.34  | 8.12  | 0.34  | 0.34  | -4.62 |               |      |       |
| U.K. (FTSE 100)          | 7,537.90  | 0.30  | 5.34  | 0.30  | 0.30  | 2.08  |               |      |       |
| Japan (Topix)            | 1,944.27  | -0.11 | 8.04  | -0.11 | -0.11 | -2.41 |               |      |       |
| <b>Emerging Markets</b>  |           |       |       |       |       |       |               |      |       |
| MSCI EM Index            | 1,145.85  | 0.36  | 5.54  | 0.36  | 0.36  | -6.99 |               |      |       |
| China (SSE Composite)    | 3,282.72  | 0.94  | -0.82 | 0.94  | 0.94  | -9.81 |               |      |       |
| India (Sensex)           | 59,276.69 | 1.21  | 6.71  | 1.21  | 1.21  | 1.76  |               |      |       |

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|------------------------|----------|-------|-------|-------|-------|--------|---------------|------|-------|
|                        |          | %     | %     | %     | %     | %      |               |      |       |
| <b>Kuwait</b>          |          |       |       |       |       |        |               |      |       |
| Kuwait All Share Index | 8,115.46 | -0.38 | -0.38 | -0.38 | -0.38 | 15.22  | 48.19 KWD     | 2.45 | 29.25 |
| Kuwait Premier Index   | 9,018.82 | -0.47 | -0.47 | -0.47 | -0.47 | 18.06  | 37.05 KWD     | 2.68 | 30.71 |
| Kuwait Main Index      | 6,250.01 | -0.08 | -0.08 | -0.08 | -0.08 | 6.18   | 11.14 KWD     | 1.68 | 24.40 |
| NIC 50                 | 9,973.82 | -0.35 | -0.48 | -0.48 | -0.48 | 17.03  | 28.60 KWD     | 2.66 | 29.71 |
| <b>Kuwait Sector</b>   |          |       |       |       |       |        |               |      |       |
| Banking                | 1,924.58 | -0.29 | -0.29 | -0.29 | -0.29 | 18.60  | 28.60 KWD     | 1.35 | 31.71 |
| Telecom                | 1,264.42 | 0.18  | 0.18  | 0.18  | 0.18  | 16.07  | 3.88 KWD      | 0.78 | 16.55 |
| Industrials            | 1,277.52 | -1.35 | -1.35 | -1.35 | -1.35 | 11.92  | 4.55 KWD      | 0.96 | 14.05 |
| Financial services     | 1,653.80 | -0.42 | -0.42 | -0.42 | -0.42 | 16.19  | 4.24 KWD      | 0.88 | 26.12 |
| Real estate            | 1,389.18 | -0.43 | -0.43 | -0.43 | -0.43 | 4.73   | 3.00 KWD      | 0.74 | 24.18 |
| Basic materials        | 1,159.30 | -0.21 | -0.21 | -0.21 | -0.21 | 13.13  | 1.03 KWD      | 1.88 | 29.66 |
| Health care            | 495.03   | 0.00  | 0.00  | 0.00  | 0.00  | -37.89 | 0.25 KWD      | 3.05 | 13.01 |
| Consumer services      | 711.69   | -0.01 | -0.01 | -0.01 | -0.01 | -2.66  | 0.78 KWD      | 0.93 | 16.87 |
| Insurance              | 1,612.64 | -0.53 | -0.53 | -0.53 | -0.53 | 5.17   | 0.68 KWD      | 0.77 | 10.06 |
| Consumer Disc          | 1,521.06 | -1.42 | -1.42 | -1.42 | -1.42 | 13.80  | 0.22 KWD      | 1.31 | 10.63 |
| Energy                 | 1,302.15 | 0.26  | 0.26  | 0.26  | 0.26  | -8.82  | 0.27 KWD      | 0.95 | 16.86 |
| Technology             | 676.58   | 0.00  | 0.00  | 0.00  | 0.00  | -1.06  | 0.01 KWD      | 0.80 | 0.00  |
| Utilities              | 589.47   | 0.45  | 0.45  | 0.45  | 0.45  | -1.76  | 0.25 KWD      | 3.97 | 19.03 |

S&P GCC Composite LargeMidCap Index



### What Move the GCC markets

#### Oil Prices

Oil extended losses on Friday as members of the International Energy Agency (IEA) agreed to join in the largest-ever U.S. oil reserves release. After U.S. President Joe Biden announced the release on Thursday, prices slumped 7%. Both benchmarks notched their worst weekly performance since April 2020, Brent crude futures ended the day 0.3% lower at \$104.39.

#### Kuwait Market

The market closed today down by - 0.38%, closed at 8,115.46 value traded 48.4 million KD, Premier market value traded reached 29.7 million KD and closed at 9,018.82 down by - 0.47%.

#### Saudi Market

The Market closed down today by - 0.06%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



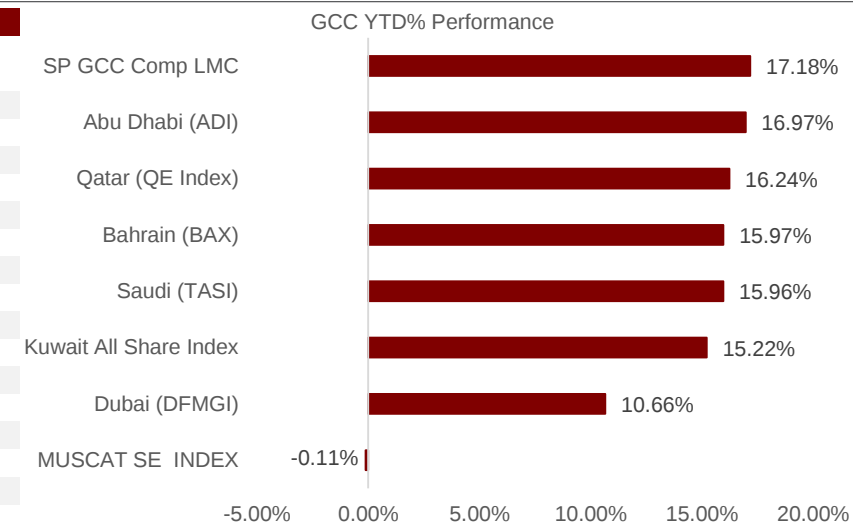
|                             | Close  | Day Δ | WTD   | MTD   | QTD   | YTD    | M Cap (in Bn) | PBV  | PE    |
|-----------------------------|--------|-------|-------|-------|-------|--------|---------------|------|-------|
| <b>Blue Chip Watch</b>      |        | %     | %     | %     | %     | %      |               |      |       |
| <b>Kuwait</b>               |        |       |       |       |       |        |               |      |       |
| NBK                         | 1.085  | -1.27 | -1.27 | -1.27 | -1.27 | 14.27  | 8.20 KWD      | 2.06 | 27.00 |
| KFH                         | 1.076  | 0.47  | 0.47  | 0.47  | 0.47  | 29.33  | 9.09 KWD      | 4.17 | 32.00 |
| Zain                        | 0.626  | -0.32 | -0.32 | -0.32 | -0.32 | 5.21   | 2.71 KWD      | 2.28 | 14.59 |
| BOUBAYAN BANK               | 0.878  | -1.81 | -1.81 | -1.81 | -1.81 | 16.71  | 2.93 KWD      | 4.11 | 34.00 |
| Agility                     | 1.094  | -1.00 | -1.00 | -1.00 | -1.00 | 15.77  | 2.44 KWD      | 1.14 | 2.36  |
| <b>Saudi Arabia</b>         |        |       |       |       |       |        |               |      |       |
| ARAMCO                      | 42.90  | -0.46 | -0.46 | -0.46 | -0.46 | 19.83  | 8,580.00 SAR  | 7.70 | 21.80 |
| SABIC                       | 131.00 | 0.00  | 0.00  | 0.00  | 0.00  | 12.93  | 393.00 SAR    | 2.18 | 35.00 |
| STC                         | 108.00 | 0.19  | 0.19  | 0.19  | 0.19  | -3.91  | 216.00 SAR    | 3.11 | 19.04 |
| AL-RAJHI BANK               | 160.80 | 0.12  | 0.12  | 0.12  | 0.12  | 13.40  | 402.00 SAR    | 5.97 | 27.23 |
| NCB                         | 70.10  | -1.13 | -1.13 | -1.13 | -1.13 | 8.85   | 313.91 SAR    | 1.92 | 20.49 |
| <b>United Arab Emirates</b> |        |       |       |       |       |        |               |      |       |
| ETISALAT.AD                 | 37.28  | 0.87  | 6.51  | 0.87  | 0.87  | 17.60  | 324.21 AED    | 6.81 | 34.80 |
| FAB.AD                      | 23.42  | -0.76 | 5.50  | -0.76 | -0.76 | 25.76  | 258.74 AED    | 2.29 | 21.24 |
| EMIRATES NBD                | 15.00  | 0.00  | 1.35  | 0.00  | 0.00  | 10.70  | 94.75 AED     | 1.13 | 10.87 |
| DB ISLAMIC BK               | 6.20   | 0.49  | 3.33  | 0.49  | 0.49  | 15.24  | 44.89 AED     | 1.15 | 11.75 |
| EMAAR PROPERT               | 5.99   | -0.17 | 13.02 | -0.17 | -0.17 | 22.49  | 49.00 AED     | 0.79 | 11.51 |
| <b>Qatar</b>                |        |       |       |       |       |        |               |      |       |
| QNB                         | 22.96  | -0.48 | -0.48 | -0.48 | -0.48 | 13.72  | 213.12 QAR    | 2.14 | 17.37 |
| INDUSTRIES QAT              | 18.89  | -0.58 | -0.58 | -0.58 | -0.58 | 21.95  | 114.85 QAR    | 2.89 | 14.13 |
| QA ISLAMIC BK               | 23.84  | 0.00  | 0.00  | 0.00  | 0.00  | 30.06  | 56.61 QAR     | 2.28 | 16.77 |
| MASRAF AL RAYA              | 5.16   | -0.19 | -0.19 | -0.19 | -0.19 | 11.21  | 48.23 QAR     | 1.96 | 22.53 |
| MESAIEED PETRO              | 2.87   | -1.55 | -1.55 | -1.55 | -1.55 | 37.08  | 36.17 QAR     | 2.11 | 19.33 |
| <b>OMAN</b>                 |        |       |       |       |       |        |               |      |       |
| BANK MUSCAT                 | 0.504  | -1.18 | -1.18 | -1.18 | -1.18 | 9.34   | 1.89 OMR      | 0.88 | 8.33  |
| OMANTEL                     | 0.852  | -2.74 | -2.74 | -2.74 | -2.74 | 13.30  | 0.65 OMR      | 1.16 | 7.69  |
| BANK DHOFAR                 | 0.113  | -1.74 | -1.74 | -1.74 | -1.74 | -10.32 | 0.34 QAR      | 0.48 | 14.93 |
| NAT BANK OF OMAN            | 0.190  | -7.32 | -7.32 | -7.32 | -7.32 | -3.55  | 0.31 QAR      | 0.56 | 12.71 |
| OMINVEST                    | 0.318  | -5.92 | -5.92 | -5.92 | -5.92 | 3.92   | 0.21 QAR      | 0.94 | 6.85  |

| Foreign Holding |        |        |       |       |         |       |       |        |       |       |
|-----------------|--------|--------|-------|-------|---------|-------|-------|--------|-------|-------|
| Date            | NBK    | GBK    | CBK   | ABK   | MUTAHED | KIB   | BURG  | KFH    | BOUB  | WARBA |
| 23-Mar-22       | 21.77% | 12.72% | 0.06% | 0.48% | 0.37%   | 6.78% | 2.51% | 10.62% | 5.38% | 4.03% |
| 30-Mar-22       | 21.89% | 12.79% | 0.06% | 0.48% | 0.36%   | 6.89% | 2.55% | 10.67% | 5.44% | 3.98% |

### End of Report

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### Leading Sector, Security Performance

#### Kuwait

The market is down today by -0.38 %The leading sector bottom performance indices today are Consumer Disc -1.42 % Industrials -1.35 % Insurance -0.53 % respectively

Telecommunication sector are up today by + 0.18 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 0.85 %

#### KSA

Saudi Armco has a negative performance today by -0.46 %, SABIC has a flat performance today

STC has a positive performance today by + 0.19 %, Al Rajhi Bank has a positive performance today by + 0.12 %

#### UAE

ETISALAT .AD has a positive performance today by + 0.87 %, FAB.AD has a negative performance today by -0.76 %



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