



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

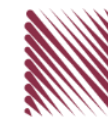
GCC DAILY MORNING BRIEF

Sunday, May 22, 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)	12,334.94	-0.75	-3.90	-10.19	-5.77	9.34	11,742 SAR	2.20	20.76
Qatar (QE Index)	12,741.49	0.09	-3.06	-6.25	-5.85	9.60	646 QAR	1.53	14.66
Dubai (DFMGI)	3,393.18	0.09	2.00	-8.78	-3.78	6.17	458 AED	1.87	39.81
Abu Dhabi (ADI)	9,934.39	0.90	7.71	-1.46	-0.14	17.04	1,435 AED	2.02	20.22
Bahrain (BAX)	1,905.88	-0.85	-2.75	-7.31	-8.09	6.04	19 BHD	1.28	171.50
MUSCAT SE INDEX	4,140.44	-0.39	-0.13	-0.43	-1.54	0.26	5 OMR	0.94	13.25
SP GCC Comp LMC	205.97	-0.34	-2.55	-10.25	-7.53	8.54			

Developed Markets

MSCI World Index	2,655.91	0.16	0.61	-5.00	-13.01	-17.82			
U.S. (S&P 500)	3,901.36	0.01	-0.73	-5.58	-13.89	-18.14			
U.K. (FTSE 100)	7,389.98	1.19	2.17	-2.05	-1.67	0.07			
Japan (Topix)	1,877.37	0.93	2.63	-1.17	-3.55	-5.77			

Emerging Markets

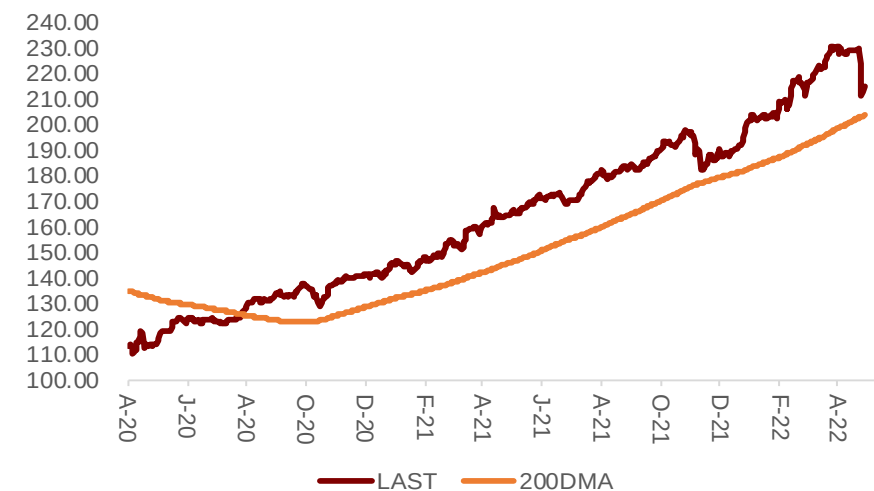
MSCI EM Index	1,035.31	2.01	4.81	-3.80	-9.33	-15.97			
China (SSE Composite)	3,146.57	1.60	3.00	3.27	-3.25	-13.55			
India (Sensex)	54,326.39	2.91	2.64	-4.79	-7.24	-6.74			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,803.74	-0.33	-0.83	-6.64	-4.21	10.80	46.66 KWD	2.52	23.37
Kuwait Premier Index	8,664.29	-0.37	-0.83	-6.92	-4.38	13.42	35.80 KWD	2.71	25.63
Kuwait Main Index	6,030.23	-0.18	-0.80	-5.63	-3.59	2.45	10.87 KWD	1.88	15.96
NIC 50	9,679.40	-0.30	-0.84	-6.93	-4.39	13.58	28.60 KWD	2.69	24.63

Kuwait Sector

Banking	1,834.22	-0.29	-1.66	-6.32	-4.97	13.03	27.48 KWD	1.46	26.63
Telecom	1,296.89	-0.38	2.84	-8.20	2.75	19.05	3.98 KWD	0.95	14.63
Industrials	1,306.08	-0.35	0.77	-8.51	0.86	14.42	4.65 KWD	1.00	11.87
Financial services	1,515.08	-0.65	-1.55	-8.54	-8.77	6.45	3.94 KWD	0.79	18.91
Real estate	1,287.15	-0.23	0.60	-6.08	-7.75	-2.96	2.78 KWD	0.69	17.70
Basic materials	1,162.14	-0.31	0.43	0.23	0.03	13.40	1.04 KWD	1.70	11.74
Health care	492.00	0.00	0.00	2.07	-0.61	-38.27	0.24 KWD	2.98	13.83
Consumer services	668.17	0.53	-3.47	-5.88	-6.12	-8.61	0.78 KWD	0.90	31.53
Insurance	1,507.89	-1.17	-1.13	-2.17	-6.99	-1.66	0.63 KWD	0.72	8.93
Consumer Disc	1,523.50	-0.21	-0.30	-5.68	-1.26	13.98	0.20 KWD	1.20	13.01
Energy	1,218.20	2.27	-0.67	-2.48	-6.21	-14.70	0.25 KWD	0.87	16.33
Technology	615.46	0.00	-10.95	-8.04	-9.03	-10.00	0.01 KWD	0.74	0.00
Utilities	563.16	-0.46	-0.46	-3.60	-4.04	-6.14	0.24 KWD	2.69	16.50

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices edged up on Friday as a planned European Union ban on Russian oil and easing of COVID-19 lockdowns in China countered concerns that slowing economic growth will hurt demand Brent futures for July delivery settled 0.46% higher at \$112.55 per barrel.

Kuwait Market

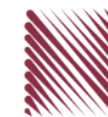
The market closed down today by -0.33%, closed at 7,803.74 value traded 52.6 million KD, Premier market value traded reached 40.2 million KD and closed at 8,664.29 down by -0.37%.

Saudi Market

The Market closed down today by -0.75%, GCC Market closed down as fears grew that fast-rising inflation will drive a sharp rise in interest rates that brings the global economy to a standstill.

DAILY MARKETS WRAP,

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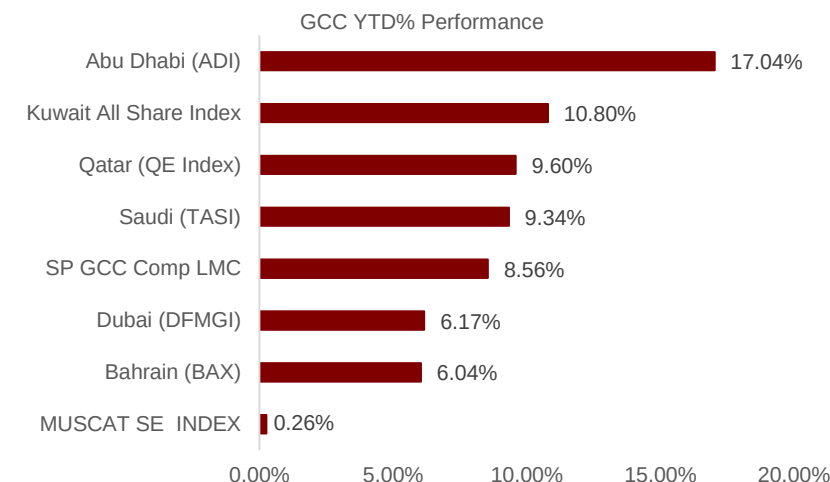
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.025	0.49	-0.49	-2.57	-6.73	7.95	7.75 KWD	2.02	27.00
KFH	0.897	-0.33	-3.03	-8.93	-7.87	18.59	8.34 KWD	4.37	32.00
Zain	0.637	-0.78	4.77	-6.46	1.43	7.06	2.76 KWD	2.43	14.63
BOUBYAN BANK	0.842	-0.94	-1.52	-9.35	-0.56	18.20	3.15 KWD	4.17	34.00
Agility	1.127	-0.27	2.83	-9.84	1.99	19.26	2.52 KWD	1.31	2.43
Saudi Arabia									
ARAMCO	39.20	-1.38	-3.53	-3.96	0.05	20.45	8,624.00 SAR	7.20	19.61
SABIC	119.00	-0.34	-1.65	-9.16	-9.16	2.59	357.00 SAR	1.90	35.00
STC	105.60	0.57	-4.00	-8.97	-2.04	-6.05	211.20 SAR	3.00	18.41
AL-RAJHI BANK	92.90	-0.64	-7.29	-15.83	-7.45	4.82	371.60 SAR	4.74	26.72
NCB	68.00	-2.58	-8.11	-13.92	-4.09	5.59	304.50 SAR	1.83	20.91
United Arab Emirates									
ETISALAT.AD	31.02	-2.45	4.66	-11.37	-16.07	-2.15	269.77 AED	5.51	28.70
FAB.AD	20.02	1.62	6.49	-10.78	-15.17	7.51	221.17 AED	1.99	14.91
EMIRATES NBD	13.25	-0.75	0.38	-13.11	-11.67	-2.21	83.69 AED	1.03	9.13
DB ISLAMIC BK	5.99	1.53	2.39	-7.13	-2.92	11.34	43.37 AED	1.13	9.79
EMAAR PROPERT	5.90	0.17	7.27	-7.52	-1.67	20.65	48.26 AED	0.76	7.96
Qatar									
QNB	20.59	-0.53	-10.48	-11.44	-10.75	1.98	191.12 QAR	1.96	15.20
INDUSTRIES QAT	17.24	-0.46	0.88	-8.35	-9.26	11.30	104.82 QAR	2.89	11.18
QA ISLAMIC BK	24.14	0.58	-1.47	-1.43	1.26	31.70	57.32 QAR	2.35	16.47
MASRAF AL RAYA	4.73	1.74	-10.57	-12.23	-8.49	1.96	44.22 QAR	1.42	21.52
MESAIEED PETRO	2.53	-0.16	1.20	-2.32	-13.06	21.05	31.94 QAR	1.97	16.50
OMAN									
BANK MUSCAT	0.524	0.38	0.00	-0.38	2.75	13.68	1.97 OMR	0.94	8.33
OMANTEL	0.868	-2.25	1.40	0.93	-0.91	15.43	0.65 OMR	1.16	7.69
BANK DHOFAR	0.115	0.00	-0.86	-2.54	0.00	-8.73	0.34 QAR	0.49	14.93
NAT BANK OF OMAN	0.200	0.00	1.01	0.00	-2.44	1.52	0.32 QAR	0.58	12.71
OMINVEST	0.310	0.00	-1.90	-1.27	-8.28	1.31	0.21 QAR	0.69	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
11-May- 22	22.57%	13.37%	0.06%	0.46%	0.41%	6.88%	2.54%	11.11%	5.54%	3.99%
18-May- 22	22.6%	13.25%	0.06%	0.50%	0.42%	6.82%	2.53%	11.08%	5.50%	4.0%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.33 %The leading sector bottom performance indices today are Insurance -1.17 % Financial services -0.65 % Utilities -0.46 % respectively

Telecommunication sector are down today by -0.38 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 8.25 %

KSA

Saudi Armco have negative performance today by -1.38 %, SABIC have negative performance today by -0.34 %

STC has a positive performance today by + 0.57 %, Al Rajhi Bank have negative performance today by -0.64 %

UAE

ETISALAT .AD have negative performance today by -2.45 %, FAB.AD has a positive performance today by + 1.62 %



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