

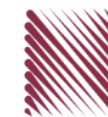


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, May 24, 2022





Market Watch

Description	Close	Day Δ	WTD	MTD	QTD		M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,300.86	0.53	-4.16	-10.43	-6.03	9.03	11,931 SAR	2.17	20.37
Qatar (QE Index)	12,874.60	-0.39	-2.05	-5.27	-4.87	10.74	647 QAR	1.50	14.73
Dubai (DFMGI)	3,258.88	-1.47	-2.03	-12.39	-7.59	1.97	442 AED	1.74	37.57
Abu Dhabi (ADI)	9,472.28	-2.52	2.70	-6.04	-4.79	11.59	1,435 AED	1.94	19.88
Bahrain (BAX)	1,890.17	-0.19	-3.55	-8.07	-8.84	5.17	19 BHD	1.27	171.47
MUSCAT SE INDEX	4,119.76	-0.33	-0.63	-0.93	-2.03	-0.24	5 OMR	0.94	13.25
SP GCC Comp LMC	202.39	-0.52	-4.25	-11.81	-9.14	6.67			

Developed Markets

MSCI World Index	2,680.46	-0.81	1.54	-4.12	-12.20	-17.06			
U.S. (S&P 500)	3,941.48	-0.81	0.29	-4.61	-13.00	-17.30			
U.K. (FTSE 100)	7,484.35	-0.39	3.47	-0.80	-0.42	1.35			
Japan (Topix)	1,878.26	-0.86	2.68	-1.12	-3.50	-5.73			

Emerging Markets

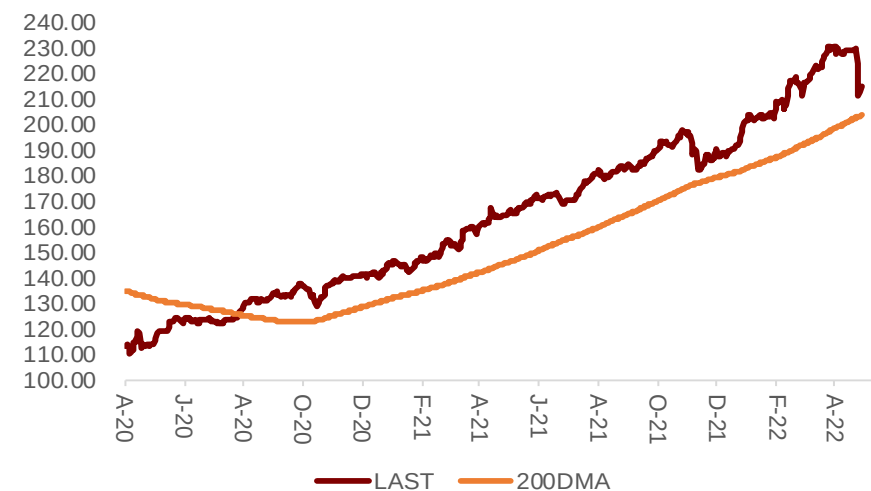
MSCI EM Index	1,016.99	-1.69	2.95	-5.50	-10.93	-17.45			
China (SSE Composite)	3,070.93	-2.41	0.52	0.78	-5.57	-15.63			
India (Sensex)	54,052.61	-0.43	2.12	-5.27	-7.71	-7.21			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,536.60	-2.08	-4.22	-9.83	-7.49	7.01	45.06 KWD	2.43	22.37
Kuwait Premier Index	8,341.11	-2.23	-4.53	-10.39	-7.95	9.19	34.47 KWD	2.60	24.47
Kuwait Main Index	5,889.75	-1.58	-3.11	-7.83	-5.84	0.06	10.59 KWD	1.86	15.61
NIC 50	9,332.75	-2.19	-4.54	-10.40	-7.96	9.51	28.60 KWD	2.58	23.47

Kuwait Sector

Banking	1,765.64	-2.21	-5.34	-9.83	-8.53	8.80	26.49 KWD	1.42	25.47
Telecom	1,240.20	-1.11	-1.66	-12.22	-1.74	13.85	3.80 KWD	0.91	13.94
Industrials	1,262.67	-2.47	-2.58	-11.55	-2.49	10.62	4.48 KWD	0.99	11.46
Financial services	1,461.63	-2.84	-5.03	-11.77	-11.99	2.69	3.80 KWD	0.78	18.23
Real estate	1,257.43	-2.16	-1.72	-8.25	-9.88	-5.20	2.71 KWD	0.64	16.58
Basic materials	1,168.20	-0.28	0.96	0.75	0.56	14.00	1.04 KWD	1.76	11.80
Health care	480.40	-2.36	-2.36	-0.34	-2.96	-39.73	0.24 KWD	2.87	13.83
Consumer services	647.89	-1.11	-6.40	-8.74	-8.97	-11.38	0.77 KWD	0.91	31.12
Insurance	1,501.77	-0.15	-1.53	-2.57	-7.37	-2.06	0.63 KWD	0.72	9.03
Consumer Disc	1,511.81	-0.66	-1.07	-6.41	-2.02	13.11	0.20 KWD	1.16	12.66
Energy	1,209.86	0.28	-1.35	-3.15	-6.85	-15.28	0.25 KWD	0.84	16.18
Technology	615.46	0.00	-10.95	-8.04	-9.03	-10.00	0.01 KWD	0.74	0.00
Utilities	555.26	-1.40	-1.86	-4.96	-5.38	-7.46	0.23 KWD	2.65	16.27

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

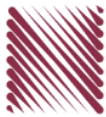
Oil fell by almost \$1 on Tuesday as concerns over a possible recession and China's Covid-19 curbs outweighed tight global supply and expectations of a pick-up in fuel demand with the U.S. summer driving season, Brent crude fell 21 cents, or 0.2%, to \$113.21 a barrel.

Kuwait Market

The market closed down today by -2.08%, closed at 7,536.60 value traded 93.4 million KD, Premier market value traded reached 73.4 million KD and closed at 8,341.11 down by -2.23%.

Saudi Market

The Market closed up today by +0.53%, 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.

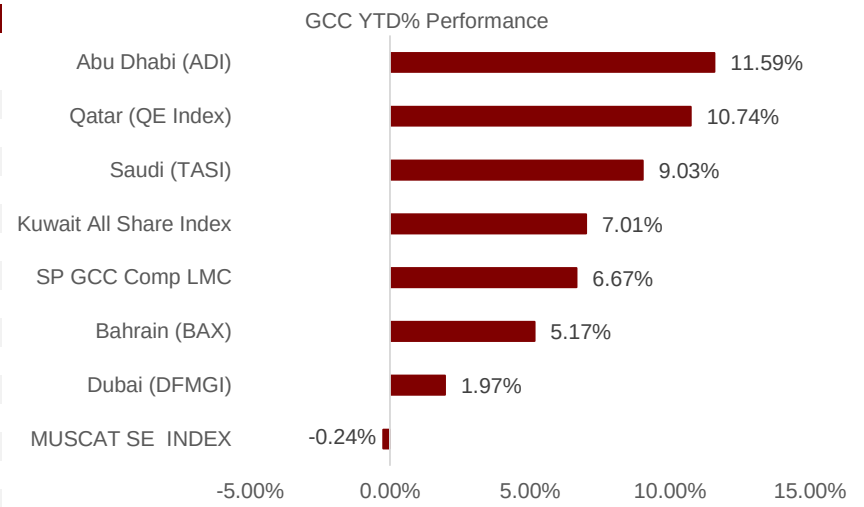


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.995	-1.00	-3.40	-5.42	-9.46	4.79	7.50 KWD	1.96	27.00
KFH	0.847	-3.53	-8.43	-14.01	-13.01	11.98	7.85 KWD	4.13	32.00
Zain	0.607	-1.30	-0.16	-10.87	-3.34	2.02	2.62 KWD	2.32	13.94
BOUBYAN BANK	0.822	-1.44	-3.86	-11.50	-2.92	15.39	3.07 KWD	4.07	34.00
Agility	1.092	-2.50	-0.36	-12.64	-1.18	15.56	2.43 KWD	1.27	2.35
Saudi Arabia									
ARAMCO	40.15	1.65	-1.20	-1.64	2.47	23.37	8,832.53 SAR	7.37	19.49
SABIC	112.40	-2.26	-7.11	-14.20	-14.20	-3.10	337.18 SAR	1.80	35.00
STC	103.60	-0.77	-5.82	-10.69	-3.90	-7.83	207.19 SAR	2.94	18.30
AL-RAJHI BANK	91.10	0.33	-9.08	-17.46	-9.24	2.79	364.38 SAR	4.65	25.95
NCB	67.80	-0.29	-8.38	-14.18	-4.37	5.28	303.59 SAR	1.83	20.37
United Arab Emirates									
ETISALAT.AD	28.80	-3.74	-2.83	-17.71	-22.08	-9.15	250.47 AED	5.12	26.64
FAB.AD	18.68	-3.01	-0.64	-16.76	-20.85	0.31	206.37 AED	1.86	13.91
EMIRATES NBD	12.75	1.19	-3.41	-16.39	-15.00	-5.90	80.54 AED	0.99	8.78
DB ISLAMIC BK	5.81	-1.53	-0.68	-9.92	-5.83	7.99	42.07 AED	1.10	9.50
EMAAR PROPERT	5.52	-3.16	0.36	-13.48	-8.00	12.88	45.15 AED	0.71	7.44
Qatar									
QNB	20.65	-0.96	-10.22	-11.18	-10.49	2.28	190.77 QAR	1.97	15.24
INDUSTRIES QAT	17.33	-0.86	1.40	-7.87	-8.79	11.88	104.87 QAR	2.90	11.24
QA ISLAMIC BK	25.00	0.04	2.04	2.08	4.87	36.39	59.09 QAR	2.43	17.05
MASRAF AL RAYA	4.84	-0.51	-8.60	-10.30	-6.48	4.20	44.98 QAR	1.45	22.00
MESAIEED PETRO	2.53	-0.39	1.20	-2.32	-13.06	21.05	31.79 QAR	1.97	16.50
OMAN									
BANK MUSCAT	0.522	-0.38	-0.38	-0.76	2.35	13.24	1.97 OMR	0.94	8.33
OMANTEL	0.860	-3.15	0.47	0.00	-1.83	14.36	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	-1.90	-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 -2.08 %The leading sector bottom performance indices today are Financial services -2.84 % Industrials -2.47 % Health care -2.36 % respectively

Telecommunication sector are down today by -1.11 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 6.84 %

KSA
Saudi Armco has a positive performance today by + 1.65 %, SABIC have negative performance today by -2.26 %

STC have negative performance today by -0.77 %, Al Rajhi Bank has a positive performance today by + 0.33 %

UAE
ETISALAT .AD have negative performance today by -3.74 %, FAB.AD have negative performance today by -3.01 %



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