



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Wednesday, May 25, 2022



# DAILY MARKETS WRAP,

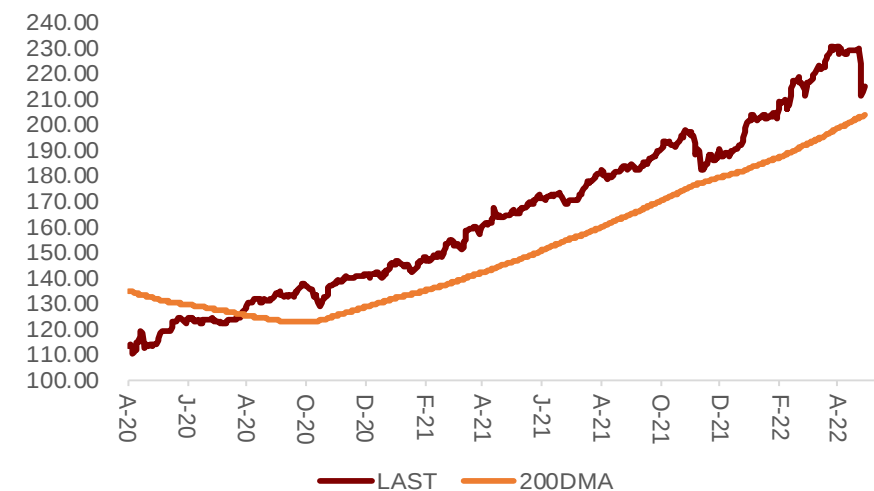
## NIC RESEARCH AND STUDIES DEP



### Market Watch

| Description              | Close     | Day Δ | WTD   | MTD    | QTD    | YTD    | M Cap (in Bn) | PBV  | PE     |
|--------------------------|-----------|-------|-------|--------|--------|--------|---------------|------|--------|
| <b>GCC Markets</b>       |           | %     | %     | %      | %      | %      |               |      |        |
| Saudi (TASI)             | 12,588.89 | 2.34  | -1.92 | -8.34  | -3.83  | 11.59  | 12,198 SAR    | 2.20 | 20.31  |
| Qatar (QE Index)         | 12,858.58 | -0.12 | -2.17 | -5.39  | -4.98  | 10.60  | 646 QAR       | 1.50 | 14.77  |
| Dubai (DFMGI)            | 3,258.04  | -0.03 | -2.06 | -12.41 | -7.62  | 1.94   | 443 AED       | 1.73 | 37.24  |
| Abu Dhabi (ADI)          | 9,559.27  | 0.92  | 3.65  | -5.18  | -3.92  | 12.62  | 1,435 AED     | 1.96 | 19.94  |
| Bahrain (BAX)            | 1,888.92  | -0.07 | -3.61 | -8.13  | -8.90  | 5.10   | 19 BHD        | 1.27 | 171.47 |
| MUSCAT SE INDEX          | 4,121.56  | 0.04  | -0.58 | -0.89  | -1.99  | -0.19  | 5 OMR         | 0.93 | 13.25  |
| SP GCC Comp LMC          | 206.01    | 1.79  | -2.54 | -10.23 | -7.51  | 8.58   |               |      |        |
| <b>Developed Markets</b> |           |       |       |        |        |        |               |      |        |
| MSCI World Index         | 2,700.09  | 0.73  | 2.29  | -3.42  | -11.56 | -16.45 |               |      |        |
| U.S. (S&P 500)           | 3,978.73  | 0.95  | 1.24  | -3.71  | -12.18 | -16.52 |               |      |        |
| U.K. (FTSE 100)          | 7,522.75  | 0.51  | 4.00  | -0.29  | 0.09   | 1.87   |               |      |        |
| Japan (Topix)            | 1,876.58  | -0.09 | 2.59  | -1.21  | -3.59  | -5.81  |               |      |        |
| <b>Emerging Markets</b>  |           |       |       |        |        |        |               |      |        |
| MSCI EM Index            | 1,019.59  | 0.26  | 3.22  | -5.26  | -10.70 | -17.24 |               |      |        |
| China (SSE Composite)    | 3,107.46  | 1.19  | 1.72  | 1.98   | -4.45  | -14.62 |               |      |        |
| India (Sensex)           | 53,749.26 | -0.56 | 1.55  | -5.80  | -8.23  | -7.73  |               |      |        |
| <b>Kuwait</b>            |           | %     | %     | %      | %      | %      |               |      |        |
| Kuwait All Share Index   | 7,583.72  | 0.63  | -3.62 | -9.27  | -6.91  | 7.67   | 45.32 KWD     | 2.43 | 22.48  |
| Kuwait Premier Index     | 8,393.87  | 0.63  | -3.93 | -9.82  | -7.37  | 9.88   | 34.66 KWD     | 2.60 | 24.61  |
| Kuwait Main Index        | 5,925.04  | 0.60  | -2.53 | -7.27  | -5.27  | 0.66   | 10.66 KWD     | 1.87 | 15.60  |
| NIC 50                   | 9,392.44  | 0.64  | -3.94 | -9.83  | -7.38  | 10.21  | 28.60 KWD     | 2.58 | 23.61  |
| <b>Kuwait Sector</b>     |           |       |       |        |        |        |               |      |        |
| Banking                  | 1,776.73  | 0.63  | -4.74 | -9.26  | -7.95  | 9.49   | 26.60 KWD     | 1.41 | 25.61  |
| Telecom                  | 1,246.00  | 0.47  | -1.20 | -11.81 | -1.28  | 14.38  | 3.83 KWD      | 0.91 | 14.03  |
| Industrials              | 1,259.37  | -0.26 | -2.84 | -11.78 | -2.75  | 10.33  | 4.49 KWD      | 0.99 | 11.53  |
| Financial services       | 1,480.09  | 1.26  | -3.83 | -10.65 | -10.88 | 3.99   | 3.83 KWD      | 0.78 | 18.19  |
| Real estate              | 1,285.70  | 2.25  | 0.49  | -6.19  | -7.85  | -3.07  | 2.78 KWD      | 0.65 | 16.46  |
| Basic materials          | 1,164.01  | -0.36 | 0.59  | 0.39   | 0.20   | 13.59  | 1.04 KWD      | 1.76 | 11.75  |
| Health care              | 480.40    | 0.00  | -2.36 | -0.34  | -2.96  | -39.73 | 0.24 KWD      | 2.87 | 13.83  |
| Consumer services        | 644.23    | -0.56 | -6.93 | -9.25  | -9.49  | -11.88 | 0.78 KWD      | 0.90 | 31.50  |
| Insurance                | 1,493.90  | -0.52 | -2.04 | -3.08  | -7.85  | -2.58  | 0.62 KWD      | 0.72 | 8.86   |
| Consumer Disc            | 1,518.15  | 0.42  | -0.65 | -6.01  | -1.61  | 13.58  | 0.20 KWD      | 1.16 | 12.49  |
| Energy                   | 1,200.43  | -0.78 | -2.12 | -3.90  | -7.57  | -15.95 | 0.25 KWD      | 0.85 | 15.97  |
| Technology               | 669.30    | 8.75  | -3.16 | 0.00   | -1.08  | -2.13  | 0.01 KWD      | 0.80 | 0.00   |
| Utilities                | 555.26    | 0.00  | -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 prices rose on Wednesday, buoyed by tight supplies and the prospect of rising demand from the summer driving season in the United States, the world's biggest crude consumer, Brent crude futures for July rose for a fifth session running, gaining \$1.24, or 1.1%, to trade at \$114.81 a barrel.

#### Kuwait Market

The market closed up today by +0.63%, closed at 7,583.72 value traded 85.7 million KD, Premier market value traded reached 68.4 million KD and closed at 8,393.87 up by +0.63%.

#### Saudi Market

The Market closed up today by + 2.34%, 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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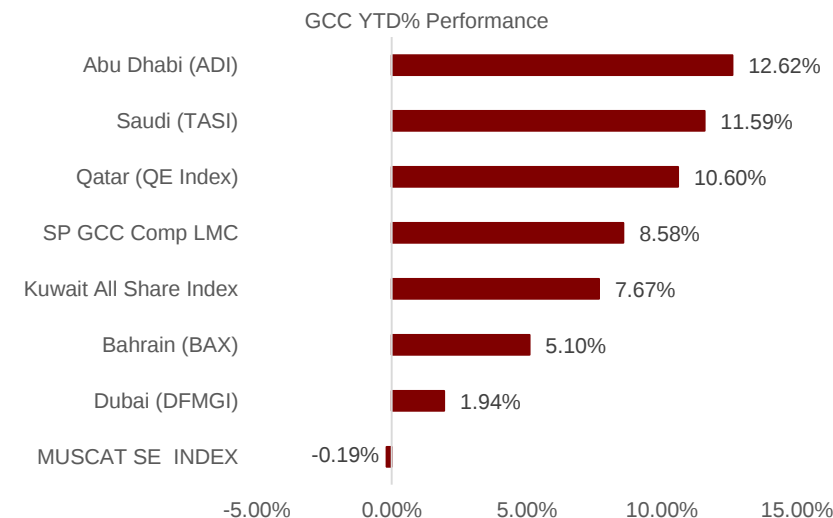
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|-----------------------------|--------|-------|-------|--------|--------|-------|---------------|------|-------|
| <b>Blue Chip Watch</b>      |        | %     | %     | %      | %      | %     |               |      |       |
| <b>Kuwait</b>               |        |       |       |        |        |       |               |      |       |
| NBK                         | 1.006  | 1.11  | -2.33 | -4.37  | -8.46  | 5.95  | 7.61 KWD      | 1.98 | 27.00 |
| KFH                         | 0.842  | -0.59 | -8.97 | -14.52 | -13.52 | 11.32 | 7.83 KWD      | 4.10 | 32.00 |
| Zain                        | 0.611  | 0.66  | 0.49  | -10.28 | -2.71  | 2.69  | 2.65 KWD      | 2.33 | 14.03 |
| BOUBYAN BANK                | 0.830  | 0.97  | -2.92 | -10.64 | -1.97  | 16.51 | 3.11 KWD      | 4.11 | 34.00 |
| Agility                     | 1.089  | -0.27 | -0.64 | -12.88 | -1.45  | 15.24 | 2.43 KWD      | 1.27 | 2.34  |
| <b>Saudi Arabia</b>         |        |       |       |        |        |       |               |      |       |
| ARAMCO                      | 41.00  | 2.12  | 0.89  | 0.45   | 4.64   | 25.98 | 9,020.24 SAR  | 7.53 | 19.81 |
| SABIC                       | 113.00 | 0.53  | -6.61 | -13.74 | -13.74 | -2.59 | 339.01 SAR    | 1.81 | 35.00 |
| STC                         | 104.40 | 0.77  | -5.09 | -10.00 | -3.15  | -7.12 | 208.81 SAR    | 2.96 | 18.16 |
| AL-RAJHI BANK               | 94.00  | 3.18  | -6.19 | -14.84 | -6.35  | 6.06  | 376.01 SAR    | 4.80 | 26.04 |
| NCB                         | 68.30  | 0.74  | -7.70 | -13.54 | -3.67  | 6.06  | 305.86 SAR    | 1.84 | 20.31 |
| <b>United Arab Emirates</b> |        |       |       |        |        |       |               |      |       |
| ETISALAT.AD                 | 29.08  | 0.97  | -1.89 | -16.91 | -21.32 | -8.26 | 252.90 AED    | 5.17 | 26.90 |
| FAB.AD                      | 19.00  | 1.71  | 1.06  | -15.33 | -19.49 | 2.03  | 209.90 AED    | 1.89 | 14.15 |
| EMIRATES NBD                | 12.80  | 0.39  | -3.03 | -16.07 | -14.67 | -5.54 | 80.85 AED     | 0.99 | 8.82  |
| DB ISLAMIC BK               | 5.79   | -0.34 | -1.03 | -10.23 | -6.16  | 7.62  | 41.92 AED     | 1.09 | 9.46  |
| EMAAR PROPERT               | 5.44   | -1.45 | -1.09 | -14.73 | -9.33  | 11.25 | 44.50 AED     | 0.70 | 7.34  |
| <b>Qatar</b>                |        |       |       |        |        |       |               |      |       |
| QNB                         | 21.00  | 1.69  | -8.70 | -9.68  | -8.97  | 4.01  | 193.16 QAR    | 2.00 | 15.50 |
| INDUSTRIES QAT              | 17.38  | 0.29  | 1.70  | -7.60  | -8.53  | 12.20 | 104.71 QAR    | 2.91 | 11.27 |
| QA ISLAMIC BK               | 24.65  | -1.40 | 0.61  | 0.65   | 3.40   | 34.48 | 58.01 QAR     | 2.40 | 16.81 |
| MASRAF AL RAYA              | 4.78   | -1.14 | -9.64 | -11.32 | -7.54  | 3.02  | 44.27 QAR     | 1.43 | 21.75 |
| MESAIEED PETRO              | 2.53   | 0.00  | 1.20  | -2.32  | -13.06 | 21.05 | 31.65 QAR     | 1.97 | 16.50 |
| <b>OMAN</b>                 |        |       |       |        |        |       |               |      |       |
| BANK MUSCAT                 | 0.524  | 0.38  | 0.00  | -0.38  | 2.75   | 13.68 | 1.97 OMR      | 0.94 | 8.33  |
| OMANTEL                     | 0.860  | -3.15 | 0.47  | 0.00   | -1.83  | 14.36 | 0.65 OMR      | 1.15 | 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            | 0.198  | -1.00 | 0.00  | -1.00  | -3.41  | 0.51  | 0.33 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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### Leading Sector, Security Performance

#### Kuwait

The market is up today by + 0.63 %The leading sector best performance indices today are Technology 8.75 % Real estate 2.25 % Financial services 1.26 % respectively

Telecommunication sector are up today by + 0.47 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 6.71 %

#### KSA

Saudi Armco has a positive performance today by + 2.12 %, SABIC have positive performance today by + 0.53 %

STC has a positive performance today by + 0.77 %, Al Rajhi Bank has a positive performance today by + 3.18 %

#### UAE

ETISALAT .AD has a positive performance today by + 0.97 %, FAB.AD has a positive performance today by + 1.71 %



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NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | [www.nic.com.kw](http://www.nic.com.kw)