



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, May 29, 2022



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

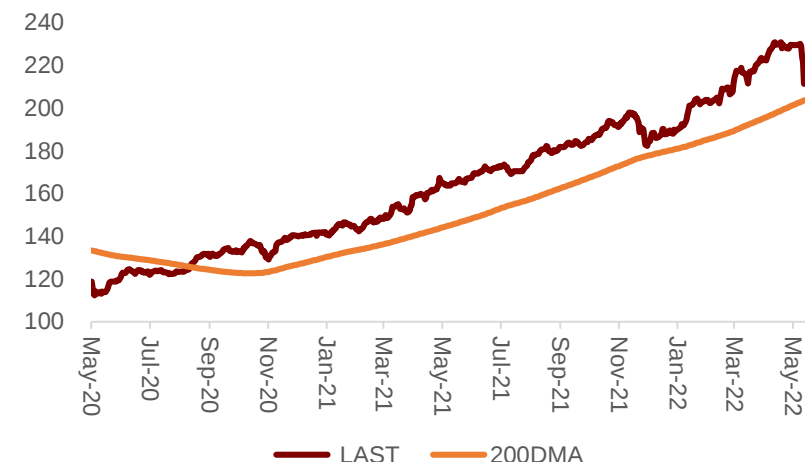


Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,689.01	1.27	-1.14	-7.61	-3.07	12.47	12,283 SAR	2.22	20.41
Qatar (QE Index)	12,861.35	0.26	-2.15	-5.37	-4.96	10.63	652 QAR	1.50	14.78
Dubai (DFMGI)	3,296.99	0.03	-0.89	-11.36	-6.51	3.16	448 AED	1.75	37.74
Abu Dhabi (ADI)	9,688.99	1.52	5.05	-3.89	-2.61	14.14	1,435 AED	1.98	20.49
Bahrain (BAX)	1,905.77	0.62	-2.75	-7.31	-8.09	6.04	19 BHD	1.25	171.51
MUSCAT SE INDEX	4,120.54	0.34	-0.61	-0.91	-2.01	-0.22	5 OMR	0.94	13.25
SP GCC Comp LMC	208.17	1.27	-1.51	-9.29	-6.54	9.70			
Developed Markets									
MSCI World Index	2,802.59	2.14	6.17	0.25	-8.20	-13.28			
U.S. (S&P 500)	4,158.24	2.47	5.81	0.64	-8.21	-12.76			
U.K. (FTSE 100)	7,585.46	0.27	4.87	0.54	0.93	2.72			
Japan (Topix)	1,887.30	0.52	3.18	-0.65	-3.04	-5.27			
Emerging Markets									
MSCI EM Index	1,043.17	1.98	5.60	-3.07	-8.64	-15.33			
China (SSE Composite)	3,130.24	0.23	2.46	2.73	-3.75	-14.00			
India (Sensex)	54,884.66	1.17	3.69	-3.81	-6.29	-5.78			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,766.46	1.76	-1.30	-7.08	-4.67	10.27	46.37 KWD	2.50	23.04
Kuwait Premier Index	8,597.66	1.88	-1.60	-7.63	-5.12	12.55	35.46 KWD	2.68	25.16
Kuwait Main Index	6,064.04	1.36	-0.25	-5.10	-3.05	3.02	10.90 KWD	1.91	16.21
NIC 50	9,638.05	1.94	-1.61	-7.64	-5.13	13.09	28.60 KWD	2.66	24.16
Kuwait Sector									
Banking	1,819.39	1.90	-2.45	-7.08	-5.74	12.12	27.20 KWD	1.44	26.16
Telecom	1,287.97	1.91	2.13	-8.84	2.04	18.23	3.95 KWD	0.95	14.40
Industrials	1,298.49	2.07	0.18	-9.04	0.27	13.75	4.62 KWD	1.03	11.76
Financial services	1,515.50	1.68	-1.53	-8.51	-8.75	6.48	3.93 KWD	0.80	18.54
Real estate	1,302.59	0.72	1.81	-4.95	-6.64	-1.80	2.82 KWD	0.67	24.97
Basic materials	1,184.39	1.51	2.36	2.15	1.95	15.58	1.06 KWD	1.76	11.96
Health care	480.10	-0.06	-2.42	-0.40	-3.02	-39.76	0.24 KWD	2.87	13.80
Consumer services	649.29	0.79	-6.20	-8.54	-8.78	-11.19	0.79 KWD	0.91	31.95
Insurance	1,522.04	1.49	-0.20	-1.25	-6.12	-0.74	0.64 KWD	0.76	9.11
Consumer Disc	1,544.43	1.41	1.07	-4.39	0.09	15.55	0.20 KWD	1.16	12.66
Energy	1,184.43	-1.67	-3.42	-5.18	-8.81	-17.07	0.25 KWD	0.86	15.50
Technology	712.22	8.78	3.05	6.41	5.27	4.15	0.01 KWD	0.85	0.00
Utilities	565.79	0.00	0.00	-3.15	-3.59	-5.70	0.24 KWD	2.70	16.58

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices were higher in the afternoon of Asia trading hours, with international benchmark Brent crude futures up 0.56% to \$120.10 per barrel.

Kuwait Market

The market closed up today by +1.76%, closed at 7,766.46 value traded 58.9 million KD, Premier market value traded reached 39.8 million KD and closed at 8,597.66 up by +1.88%.

Saudi Market

The Market closed up today by + 1.27%, 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.

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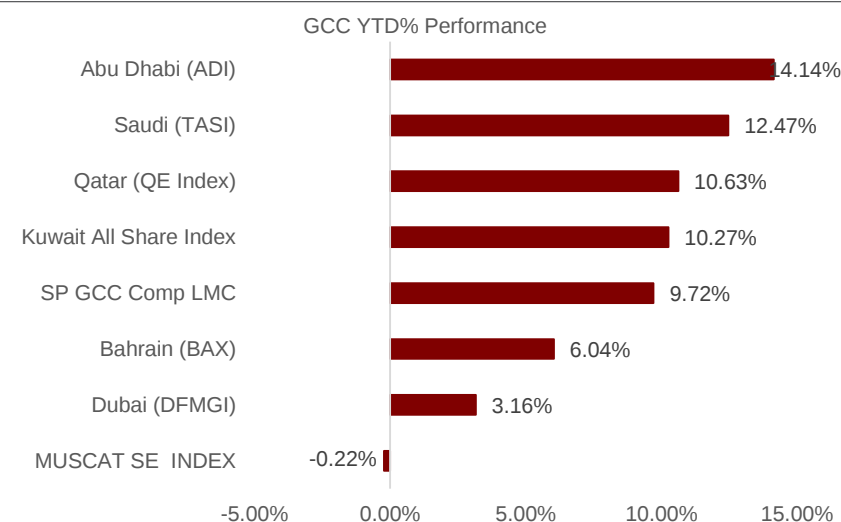
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.017	1.09	-1.26	-3.33	-7.46	7.11	7.69 KWD	2.01	27.00
KFH	0.883	2.67	-4.54	-10.36	-9.31	16.74	8.21 KWD	4.30	32.00
Zain	0.627	1.79	3.13	-7.93	-0.16	5.38	2.72 KWD	2.40	14.40
BOUBYAN BANK	0.836	2.20	-2.22	-9.99	-1.27	17.36	3.13 KWD	4.14	34.00
Agility	1.127	2.36	2.83	-9.84	1.99	19.26	2.52 KWD	1.31	2.43
Saudi Arabia									
ARAMCO	41.35	1.60	1.76	1.30	5.53	27.05	9,097.00 SAR	7.59	20.08
SABIC	114.00	1.42	-5.79	-12.98	-12.98	-1.72	342.00 SAR	1.82	35.00
STC	104.60	0.58	-4.91	-9.83	-2.97	-6.94	209.20 SAR	2.97	18.23
AL-RAJHI BANK	96.10	2.34	-4.09	-12.93	-4.26	8.43	384.40 SAR	4.91	26.84
NCB	68.10	1.34	-7.97	-13.80	-3.95	5.75	304.95 SAR	1.84	20.13
United Arab Emirates									
ETISALAT.AD	29.10	-1.02	-1.82	-16.86	-21.27	-8.20	253.08 AED	5.17	26.92
FAB.AD	19.84	5.98	5.53	-11.59	-15.93	6.54	219.18 AED	1.97	14.78
EMIRATES NBD	13.00	-1.52	-1.52	-14.75	-13.33	-4.06	82.12 AED	1.01	8.96
DB ISLAMIC BK	5.90	1.72	0.85	-8.53	-4.38	9.67	42.72 AED	1.12	9.64
EMAAR PROPERT	5.46	0.18	-0.73	-14.42	-9.00	11.66	44.66 AED	0.70	7.36
Qatar									
QNB	20.70	0.98	-10.00	-10.97	-10.27	2.53	192.14 QAR	1.97	15.28
INDUSTRIES QAT	17.70	1.26	3.57	-5.90	-6.84	14.27	107.61 QAR	2.96	11.48
QA ISLAMIC BK	23.91	-1.40	-2.41	-2.37	0.29	30.44	56.78 QAR	2.32	16.31
MASRAF AL RAYA	4.80	0.10	-9.19	-10.87	-7.08	3.53	44.90 QAR	1.44	21.86
MESAIEED PETRO	2.56	0.91	2.52	-1.04	-11.92	22.63	32.36 QAR	2.00	16.72
OMAN									
BANK MUSCAT	0.530	0.76	1.15	0.76	3.92	14.98	1.99 OMR	0.95	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	0.33 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
18-May- 22	22.6%	13.25%	0.06%	0.50%	0.42%	6.82%	2.53%	11.08%	5.50%	4.0%
25-May- 22	22.6%	14.15%	0.06%	0.71%	0.42%	6.73%	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 up today by + 1.76 %The leading sector best performance indices today are Technology 8.78 % Industrials 2.07 % Telecom 1.91 % respectively

Telecommunication sector are up today by + 1.91 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 7.96 %

KSA

Saudi Armco has a positive performance today by + 1.6 %, SABIC has a positive performance today by + 1.42 %

STC has a positive performance today by + 0.58 %, Al Rajhi Bank has a positive performance today by + 2.34 %

UAE

ETISALAT .AD has a negative performance today by -1.02 %, FAB.AD has a positive performance today by + 5.98 %



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