



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, June 20, 2022

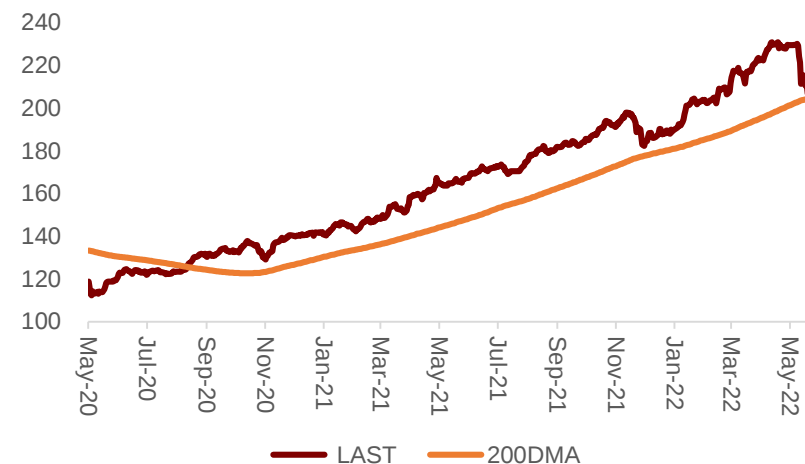




Market Watch Monday, June 20, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	11,361.53	0.55	-3.91	-12.07	-13.21	0.71	10,997 SAR	1.92	17.87
Qatar (QE Index)	12,069.95	-0.41	-3.92	-6.58	-10.81	3.82	607 QAR	1.51	14.50
Dubai (DFMGI)	3,210.32	-1.59	-2.14	-4.09	-8.97	0.45	440 AED	1.38	34.44
Abu Dhabi (ADI)	9,354.32	-1.08	-1.58	-6.97	-5.98	10.20	1,435 AED	1.96	20.26
Bahrain (BAX)	1,830.65	-0.08	-1.13	-4.69	-11.71	1.86	18 BHD	1.18	171.38
MUSCAT SE INDEX	4,136.52	0.39	0.34	0.50	-1.63	0.17	5 OMR	0.92	13.25
SP GCC Comp LMC	190.96	0.20	-3.40	-10.36	-14.27	0.64			
Developed Markets									
MSCI World Index	2,494.99	0.37	0.18	-10.61	-18.28	-22.80			
U.S. (S&P 500)	3,674.84	0.00	0.22	-11.07	-18.89	-22.90			
U.K. (FTSE 100)	7,121.81	1.50	1.09	-6.39	-5.24	-3.56			
Japan (Topix)	1,818.94	-0.92	-2.62	-4.90	-6.55	-8.70			
Emerging Markets									
MSCI EM Index	1,000.42	-0.42	-0.76	-7.17	-12.38	-18.80			
China (SSE Composite)	3,315.43	-0.04	0.91	4.05	1.94	-8.91			
India (Sensex)	51,597.84	0.46	0.20	-7.14	-11.90	-11.43			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	7,162.70	-0.21	-3.39	-8.45	-12.08	1.70	42.87 KWD	2.32	21.06
Kuwait Premier Index	7,928.99	-0.19	-3.52	-8.61	-12.50	3.79	32.75 KWD	2.46	22.92
Kuwait Main Index	5,593.40	-0.28	-2.92	-7.87	-10.57	-4.98	10.12 KWD	1.87	15.06
NIC 50	8,875.53	-0.26	-3.53	-8.62	-12.51	4.14	28.60 KWD	2.44	21.92
Kuwait Sector									
Banking	1,701.33	0.13	-2.61	-6.84	-11.86	4.84	25.51 KWD	1.28	23.92
Telecom	1,207.41	-1.19	-3.04	-6.71	-4.34	10.84	3.70 KWD	0.85	13.67
Industrials	1,175.05	-0.69	-5.42	-11.13	-9.26	2.94	4.19 KWD	0.98	10.66
Financial services	1,313.48	-0.18	-5.74	-14.68	-20.91	-7.72	3.46 KWD	0.74	16.69
Real estate	1,168.58	-1.04	-5.32	-11.48	-16.25	-11.90	2.53 KWD	0.64	22.73
Basic materials	990.85	-1.01	-4.85	-17.86	-14.71	-3.31	0.88 KWD	1.47	9.50
Health care	480.10	0.00	0.00	0.00	-3.02	-39.76	0.24 KWD	2.87	13.80
Consumer services	519.47	-4.54	-7.45	-20.33	-27.02	-28.95	0.76 KWD	0.88	31.75
Insurance	1,515.22	-0.05	-1.00	0.81	-6.54	-1.18	0.63 KWD	0.74	8.33
Consumer Disc	1,460.05	0.02	-2.89	-7.87	-5.37	9.23	0.16 KWD	0.96	10.16
Energy	1,146.37	0.27	0.78	-1.74	-11.74	-19.73	0.24 KWD	0.80	15.64
Technology	640.20	-2.22	-2.22	-4.35	-5.38	-6.38	0.01 KWD	0.77	0.00
Utilities	523.68	-1.00	-3.87	-7.44	-10.76	-12.72	0.22 KWD	2.50	15.34

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices edged down on Monday, reversing earlier gains, as concerns about slowing global economic growth and fuel demand offset worries about tightening supplies, Brent crude futures slipped 8 cents, or 0.1%, to \$113.04 a barrel.

Kuwait Market

The market closed down today by -0.21%, closed at 7,162.70 value traded 74.0 million KD, Premier market value traded reached 55.5 million KD and closed at 7,928.99 down by -0.19%.

Saudi Market

The Market closed up today by +0.55%, 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.

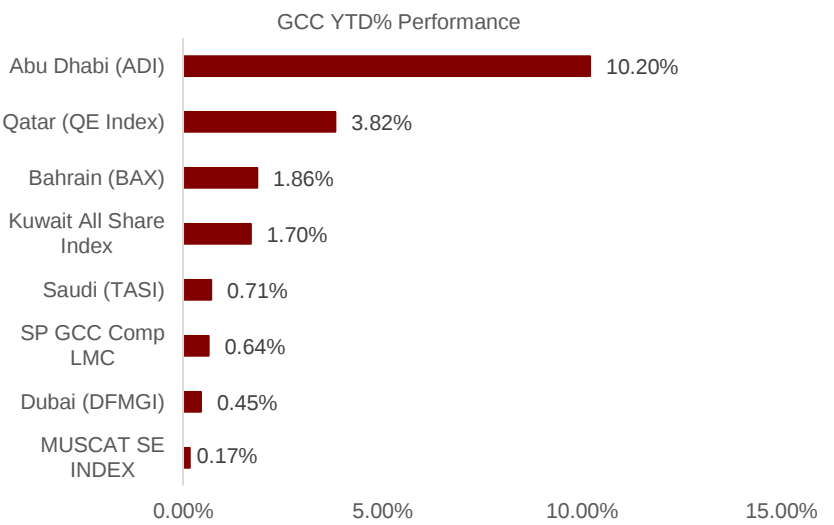


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.028	1.28	-0.68	-0.96	-6.46	8.26	7.76 KWD	2.03	27.00
KFH	0.798	-0.37	-3.86	-11.23	-18.04	5.50	7.41 KWD	3.89	32.00
Zain	0.595	-1.65	-3.09	-5.56	-5.25	0.00	2.57 KWD	2.27	13.67
BOUBYAN BANK	0.740	-1.99	-5.97	-8.87	-12.60	3.88	2.77 KWD	3.66	34.00
Agility	1.003	-1.67	-7.81	-12.63	-9.23	6.14	2.24 KWD	1.17	2.16
Saudi Arabia									
ARAMCO	36.90	-0.14	-4.16	-11.93	-5.82	13.38	8,118.00 SAR	6.78	18.23
SABIC	102.20	1.19	-0.97	-10.82	-21.98	-11.90	306.60 SAR	1.63	35.00
STC	99.20	-0.10	-2.55	-3.50	-7.98	-11.74	198.40 SAR	2.82	17.41
AL-RAJHI BANK	83.10	1.09	-3.60	-15.98	-17.21	-6.23	332.40 SAR	4.24	23.50
NCB	63.40	0.96	-4.37	-12.43	-10.58	-1.55	283.91 SAR	1.71	18.81
United Arab Emirates									
ETISALAT.AD	26.86	-1.54	-2.33	-11.47	-27.33	-15.27	233.58 AED	4.77	24.85
FAB.AD	18.82	-0.95	-2.08	-12.38	-20.25	1.06	207.90 AED	1.87	14.02
EMIRATES NBD	13.30	-1.48	-1.85	1.14	-11.33	-1.85	84.00 AED	1.03	9.16
DB ISLAMIC BK	5.64	-0.35	-0.18	-5.21	-8.59	4.83	40.83 AED	1.07	9.22
EMAAR PROPERT	5.17	-2.64	-5.31	-9.46	-13.83	5.73	42.29 AED	0.67	6.97
Qatar									
QNB	19.65	1.81	-0.91	-8.82	-14.82	-2.67	181.42 QAR	1.87	14.50
INDUSTRIES QAT	15.45	-2.15	-7.49	-15.53	-18.68	-0.26	93.43 QAR	2.59	10.02
QA ISLAMIC BK	21.25	0.00	-2.92	-8.21	-10.86	15.93	50.19 QAR	2.06	14.50
MASRAF AL RAYA	4.23	-4.54	-8.06	-10.00	-18.18	-8.84	39.32 QAR	1.27	19.24
MESAIEED PETRO	2.50	-3.81	-8.69	-7.71	-14.05	19.67	31.41 QAR	1.95	16.31
OMAN									
BANK MUSCAT	0.528	-0.38	-1.12	0.76	3.53	14.55	1.98 OMR	0.95	8.33
OMANTEL	0.872	-1.80	0.00	0.93	-0.46	15.96	0.65 OMR	1.17	7.69
BANK DHOFAR	0.117	0.86	0.86	2.63	1.74	-7.14	0.35 QAR	0.50	14.93
NAT BANK OF OMAN	0.207	0.49	0.00	0.98	0.98	5.08	0.34 QAR	0.60	12.71
OMINVEST	0.304	-0.65	-0.65	-1.30	-10.06	-0.65	0.20 QAR	0.68	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
8-June- 22	22.76%	15.69%	0.06%	1.09%	0.41%	6.59%	2.56%	11.22%	5.74%	4.05%
15-June- 22	22.85%	15.73%	0.06%	1.09%	0.41%	6.43%	17.65%	11.28%	5.74%	4.03%

End of Report
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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is down today by -0.21 %The leading sector bottom performance indices today are Consumer services -4.54 % Technology -2.22 % Telecom -1.19 % respectively

Telecommunication sector are down today by -1.19 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 9.14 %

KSA
Saudi Armco have negative performance today by -0.14 %, SABIC have positive performance today by + 1.18 %

STC have negative performance today by -0.1 %, Al Rajhi Bank has a positive performance today by + 1.09 %

UAE
ETISALAT .AD have negative performance today by -1.54 %, FAB.AD have negative performance today by -0.95 %



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