



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, June 21, 2022



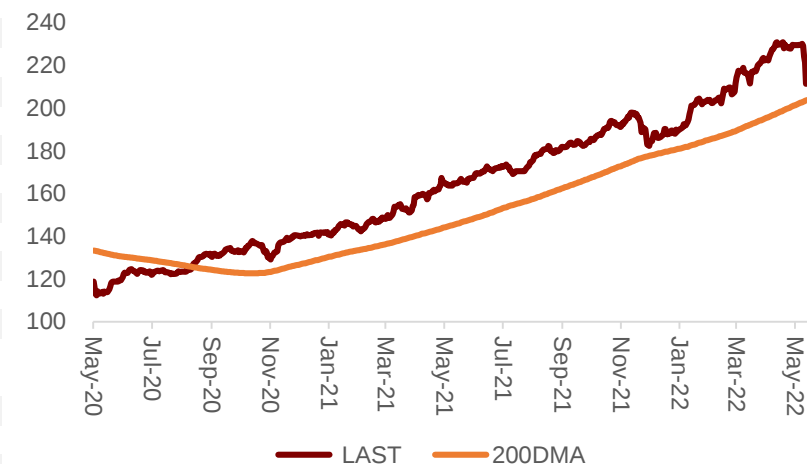


Market Watch

Tuesday, June 21, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,659.64	2.62	-1.39	-9.77	-10.93	3.35	11,212 SAR	1.97	18.21
Qatar (QE Index)	12,076.21	0.05	-3.87	-6.53	-10.77	3.87	612 QAR	1.50	14.44
Dubai (DFMGI)	3,264.31	1.68	-0.49	-2.48	-7.44	2.14	445 AED	1.38	34.54
Abu Dhabi (ADI)	9,469.98	1.24	-0.37	-5.82	-4.81	11.56	1,435 AED	1.98	20.36
Bahrain (BAX)	1,837.86	0.39	-0.74	-4.32	-11.37	2.26	18 BHD	1.18	171.41
MUSCAT SE INDEX	4,145.81	0.22	0.57	0.72	-1.41	0.39	5 OMR	0.91	13.25
SP GCC Comp LMC	195.23	2.24	-1.24	-8.35	-12.35	2.90			
Developed Markets									
MSCI World Index	2,543.36	1.94	2.12	-8.87	-16.69	-21.30			
U.S. (S&P 500)	3,764.79	2.45	2.67	-8.89	-16.90	-21.01			
U.K. (FTSE 100)	7,152.05	0.42	1.52	-5.99	-4.84	-3.15			
Japan (Topix)	1,856.20	2.05	-0.62	-2.95	-4.63	-6.83			
Emerging Markets									
MSCI EM Index	1,016.98	1.66	0.88	-5.63	-10.93	-17.45			
China (SSE Composite)	3,306.72	-0.26	0.65	3.78	1.68	-9.15			
India (Sensex)	52,532.07	1.81	2.01	-5.46	-10.31	-9.82			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,241.78	1.10	-2.32	-7.44	-11.11	2.82	43.32 KWD	2.34	21.30
Kuwait Premier Index	8,029.77	1.27	-2.29	-7.45	-11.38	5.11	33.15 KWD	2.49	23.22
Kuwait Main Index	5,622.16	0.51	-2.43	-7.40	-10.11	-4.49	10.17 KWD	1.85	15.07
NIC 50	8,989.64	1.29	-2.30	-7.46	-11.39	5.48	28.60 KWD	2.47	22.22
Kuwait Sector									
Banking	1,721.64	1.19	-1.45	-5.73	-10.80	6.09	25.79 KWD	1.32	24.22
Telecom	1,212.40	0.41	-2.64	-6.33	-3.94	11.29	3.72 KWD	0.84	13.80
Industrials	1,188.83	1.17	-4.31	-10.09	-8.20	4.15	4.23 KWD	0.95	10.69
Financial services	1,340.43	2.05	-3.81	-12.93	-19.29	-5.82	3.54 KWD	0.74	17.19
Real estate	1,178.87	0.88	-4.48	-10.70	-15.51	-11.12	2.55 KWD	0.61	23.08
Basic materials	1,001.58	1.08	-3.82	-16.97	-13.79	-2.26	0.89 KWD	1.47	9.63
Health care	463.46	-3.47	-3.47	-3.47	-6.38	-41.85	0.23 KWD	2.87	12.42
Consumer services	514.03	-1.05	-8.42	-21.16	-27.78	-29.69	0.75 KWD	0.88	32.24
Insurance	1,528.99	0.91	-0.10	1.72	-5.69	-0.29	0.64 KWD	0.76	8.42
Consumer Disc	1,461.40	0.09	-2.80	-7.78	-5.29	9.33	0.16 KWD	0.97	9.92
Energy	1,135.32	-0.96	-0.19	-2.69	-12.59	-20.50	0.24 KWD	0.81	15.24
Technology	640.20	0.00	-2.22	-4.35	-5.38	-6.38	0.01 KWD	0.77	0.00
Utilities	528.95	1.01	-2.90	-6.51	-9.86	-11.84	0.22 KWD	2.53	15.50

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices rose on Tuesday on high summer fuel demand while supplies remain tight because of sanctions on Russian oil after its invasion of Ukraine, Brent crude rose \$1.39, or 1.24%, to \$115.54 per barrel.

Kuwait Market

The market closed up today by +1.10%, closed at 7,241.78 value traded 52.7 million KD, Premier market value traded reached 36.4 million KD and closed at 8,029.77 up by +1.27%.

Saudi Market

The Market closed up today by +2.62%, 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,

NIC RESEARCH AND STUDIES DEP



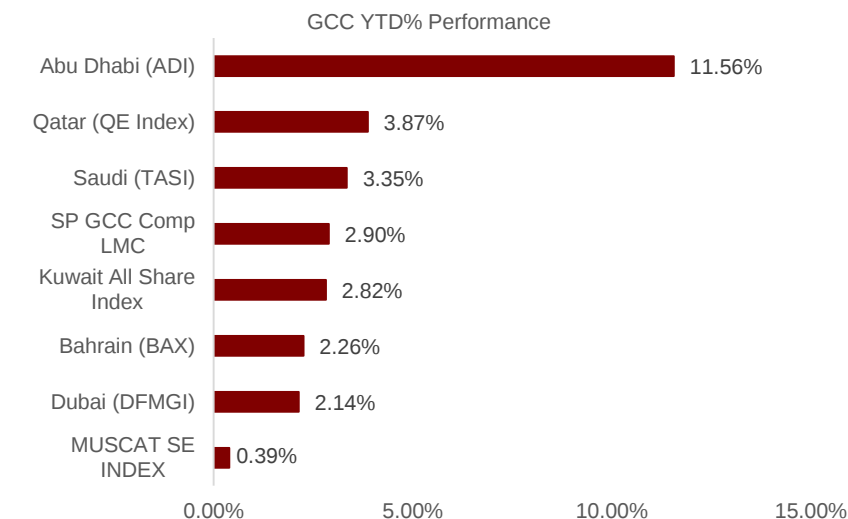
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.031	0.29	-0.39	-0.67	-6.19	8.58	7.78 KWD	2.03	27.00
KFH	0.813	1.88	-2.05	-9.57	-16.50	7.49	7.55 KWD	3.96	32.00
Zain	0.601	1.01	-2.12	-4.60	-4.30	1.01	2.60 KWD	2.30	13.80
BOUBYAN BANK	0.750	1.35	-4.70	-7.64	-11.42	5.28	2.80 KWD	3.71	34.00
Agility	1.018	1.50	-6.43	-11.32	-7.87	7.72	2.27 KWD	1.18	2.19
Saudi Arabia									
ARAMCO	37.50	1.63	-2.60	-10.50	-4.29	15.22	8,250.00 SAR	6.89	18.21
SABIC	104.60	2.35	1.36	-8.73	-20.15	-9.83	313.80 SAR	1.67	35.00
STC	99.50	0.30	-2.26	-3.21	-7.70	-11.48	199.00 SAR	2.82	17.39
AL-RAJHI BANK	85.90	3.37	-0.35	-13.14	-14.42	-3.07	343.60 SAR	4.39	23.75
NCB	65.50	3.31	-1.21	-9.53	-7.62	1.71	293.31 SAR	1.77	18.99
United Arab Emirates									
ETISALAT.AD	27.92	3.95	1.53	-7.98	-24.46	-11.92	242.81 AED	4.96	25.83
FAB.AD	19.04	1.17	-0.94	-11.36	-19.32	2.24	210.35 AED	1.89	14.18
EMIRATES NBD	13.55	1.88	0.00	3.04	-9.67	0.00	85.59 AED	1.05	9.34
DB ISLAMIC BK	5.77	2.30	2.12	-3.03	-6.48	7.25	41.78 AED	1.09	9.43
EMAAR PROPERT	5.28	2.13	-3.30	-7.53	-12.00	7.98	43.19 AED	0.68	7.12
Qatar									
QNB	19.67	0.10	-0.81	-8.72	-14.74	-2.58	182.85 QAR	1.88	14.52
INDUSTRIES QAT	15.61	1.04	-6.53	-14.65	-17.84	0.77	95.05 QAR	2.61	10.12
QA ISLAMIC BK	21.03	-1.04	-3.93	-9.16	-11.79	14.73	50.01 QAR	2.04	14.35
MASRAF AL RAYA	4.25	0.47	-7.63	-9.57	-17.79	-8.41	39.78 QAR	1.28	19.34
MESAIEED PETRO	2.52	0.56	-8.18	-7.20	-13.57	20.33	31.80 QAR	1.96	16.41
OMAN									
BANK MUSCAT	0.528	0.00	-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	0.00	0.86	2.63	1.74	-7.14	0.35 QAR	0.50	14.93
NAT BANK OF OMAN	0.207	0.00	0.00	0.98	0.98	5.08	0.34 QAR	0.60	12.71
OMINVEST	0.304	0.00	-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, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 1.1 %The leading sector best performance indices today are Financial services 2.05 % Banking 1.19 % Industrials 1.17 % respectively

Telecommunication sector are up today by + 0.41 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 8.47 %

KSA

Saudi Armco has a positive performance today by + 1.63 %, SABIC have positive performance today by + 2.34 %

STC has a positive performance today by + 0.3 %, Al Rajhi Bank has a positive performance today by + 3.37 %

UAE

ETISALAT .AD has a positive performance today by + 3.95 %, FAB.AD has a positive performance today by + 1.17 %



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