



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

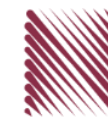
GCC DAILY MORNING BRIEF

Sunday, July 17, 2022



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

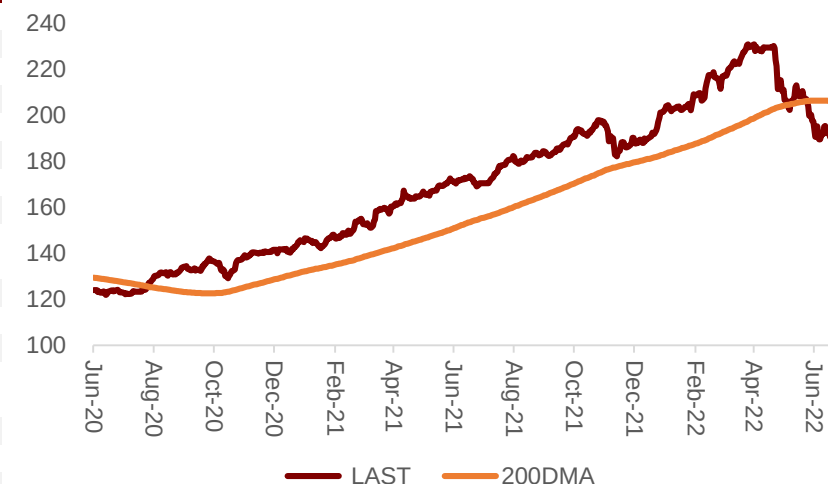


Market Watch

Sunday, July 17, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	11,292.41	1.16	1.16	-2.00	-2.00	0.09	10,995 SAR	1.93	17.88
Qatar (QE Index)	11,978.60	0.93	0.93	-1.74	-1.74	3.03	593 QAR	1.43	14.80
Dubai (DFMGI)	3,160.22	0.20	0.20	-1.96	-1.96	-1.12	433 AED	1.22	32.75
Abu Dhabi (ADI)	9,249.97	0.07	0.07	-1.33	-1.33	8.97	1,435 AED	2.05	19.86
Bahrain (BAX)	1,844.21	-0.32	-0.32	0.25	0.25	2.61	19 BHD	1.20	171.29
MUSCAT SE INDEX	4,142.77	0.04	0.04	0.49	0.49	0.32	5 OMR	0.92	13.25
SP GCC Comp LMC	189.30	0.94	0.94	-1.66	-1.66	-0.23			
SP UAE PRICE INDEX	139.51	0.37	0.37	-1.30	-1.30	-5.39			
Developed Markets									
MSCI World Index	2,568.64	1.89	1.89	0.88	0.88	-20.52			
U.S. (S&P 500)	3,863.16	1.92	1.92	2.05	2.05	-18.95			
U.K. (FTSE 100)	7,159.01	1.69	1.69	-0.14	-0.14	-3.05			
Japan (Topix)	1,892.50	-0.03	-0.03	1.16	1.16	-5.01			
Emerging Markets									
MSCI EM Index	961.85	-0.37	-0.37	-3.88	-3.88	-21.93			
China (SSE Composite)	3,228.06	-1.64	-1.64	-5.02	-5.02	-11.31			
India (Sensex)	53,760.78	0.65	0.65	1.40	1.40	-7.71			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,412.92	0.71	0.71	0.06	0.06	5.25	44.22 KWD	2.35	22.36
Kuwait Premier Index	8,248.20	0.77	0.77	0.06	0.06	7.97	33.95 KWD	2.51	24.46
Kuwait Main Index	5,683.60	0.50	0.50	0.05	0.05	-3.44	10.27 KWD	1.82	15.43
NIC 50	9,252.34	0.09	0.76	0.05	0.05	8.56	28.60 KWD	2.49	23.46
Kuwait Sector									
Banking	1,788.63	0.78	0.78	0.44	0.44	10.22	26.70 KWD	1.33	25.46
Telecom	1,203.88	0.82	0.82	-0.50	-0.50	10.51	3.69 KWD	0.87	13.69
Industrials	1,135.72	1.37	1.37	-2.43	-2.43	-0.51	4.04 KWD	0.93	10.57
Financial services	1,384.97	1.01	1.01	0.96	0.96	-2.69	3.62 KWD	0.70	16.35
Real estate	1,205.93	-0.70	-0.70	0.06	0.06	-9.08	2.60 KWD	0.60	23.37
Basic materials	1,012.01	0.18	0.18	-0.09	-0.09	-1.25	0.90 KWD	1.49	9.70
Health care	477.88	-0.06	-0.06	0.38	0.38	-40.04	0.24 KWD	2.80	12.95
Consumer services	515.74	-0.99	-0.99	-2.21	-2.21	-29.46	0.76 KWD	0.87	34.09
Insurance	1,530.70	-0.85	-0.85	-0.77	-0.77	-0.18	0.64 KWD	0.74	8.50
Consumer Disc	1,492.02	0.31	0.31	0.22	0.22	11.63	0.16 KWD	0.97	9.99
Energy	1,135.10	1.49	1.49	-2.83	-2.83	-20.52	0.24 KWD	0.83	15.44
Technology	705.67	2.11	2.11	1.04	1.04	3.19	0.01 KWD	0.85	0.00
Utilities	539.47	0.00	0.00	-0.97	-0.97	-10.09	0.23 KWD	2.58	15.81

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices gained 2.5% on Friday after a U.S. official told Reuters that an immediate Saudi oil output boost was not expected, and as investors question whether OPEC has the room to significantly ramp up crude production, Brent crude futures were up \$2.50, or 2.5%, to \$101.60 a barrel.

Kuwait Market

The market closed up today by +0.71% at 7,412.92 value traded 32.9 million KD, Premier market value traded reached 24.1 million KD and closed at 8,248.20 up by +0.77%.

Saudi Market

The Market closed up today by +1.16%, GCC Market closed up as fears ease that fast-rising inflation will drive a sharp rise in interest rates that brings the global economy to a standstill.

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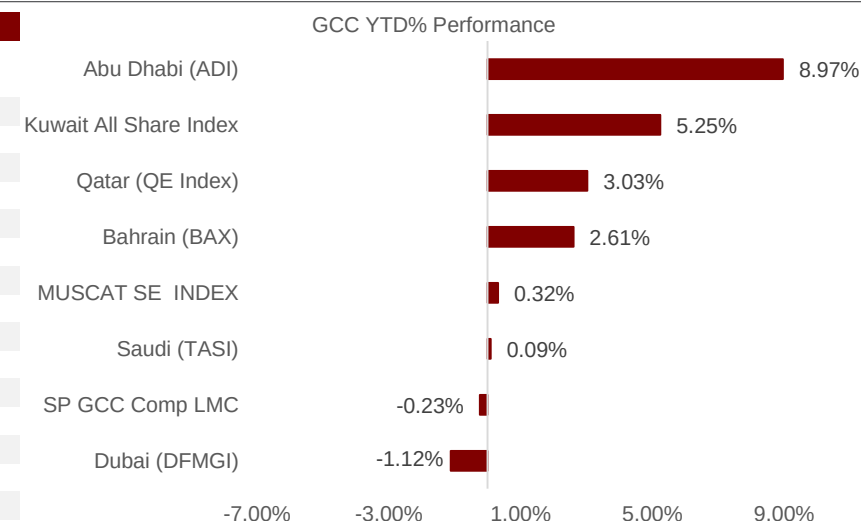
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.058	-0.19	-0.19	1.44	1.44	11.42	7.99 KWD	2.09	27.00
KFH	0.842	1.20	1.20	-3.33	-3.33	11.32	7.82 KWD	3.73	32.00
Zain	0.596	0.68	0.68	0.34	0.34	0.17	2.58 KWD	2.28	13.69
BOUBYAN BANK	0.800	2.70	2.70	3.49	3.49	12.30	2.99 KWD	3.96	34.00
Agility	0.780	1.69	1.69	-4.06	-4.06	-0.95	2.09 KWD	1.09	2.42
Saudi Arabia									
ARAMCO	36.95	1.93	1.93	-4.77	-4.77	13.53	8,129.00 SAR	6.79	17.88
SABIC	96.00	1.48	1.48	-5.51	-5.51	-17.24	288.00 SAR	1.54	35.00
STC	101.20	0.40	0.40	4.22	4.22	-9.96	202.40 SAR	2.87	17.67
AL-RAJHI BANK	81.10	1.00	1.00	-1.70	-1.70	-8.49	324.40 SAR	4.14	22.95
NCB	67.00	1.98	1.98	1.67	1.67	4.04	300.03 SAR	1.81	19.68
United Arab Emirates									
ETISALAT.AD	25.88	1.33	1.33	-0.84	-0.84	-18.36	225.07 AED	4.60	23.94
FAB.AD	18.60	-0.64	-0.64	-0.96	-0.96	-0.12	205.49 AED	1.85	13.85
EMIRATES NBD	12.40	0.40	0.40	-6.06	-6.06	-8.49	78.33 AED	0.96	8.54
DB ISLAMIC BK	5.59	0.54	0.54	-2.95	-2.95	3.90	40.48 AED	1.06	9.14
EMAAR PROPERT	5.17	0.00	0.00	-0.58	-0.58	5.73	42.29 AED	0.67	6.97
Qatar									
QNB	19.30	1.63	1.63	-3.40	-3.40	-4.41	177.51 QAR	1.75	14.31
INDUSTRIES QAT	14.90	1.43	1.43	-6.58	-6.58	-3.81	89.76 QAR	2.49	9.66
QA ISLAMIC BK	23.02	0.09	0.09	3.46	3.46	25.59	54.17 QAR	2.24	15.70
MASRAF AL RAYA	3.90	0.88	0.88	-5.47	-5.47	-15.86	36.15 QAR	1.17	17.76
MESAIEED PETRO	2.53	-1.56	-1.56	1.61	1.61	21.05	31.65 QAR	1.97	16.50
OMAN									
BANK MUSCAT	0.534	0.38	0.38	1.14	1.14	15.85	2.00 OMR	0.96	8.33
OMANTEL	0.872	-1.80	-0.46	0.00	0.00	15.96	0.65 OMR	1.17	7.69
BANK DHOFAR	0.115	0.88	0.88	-1.71	-1.71	-8.73	0.34 QAR	0.49	14.93
NAT BANK OF OMAN	0.216	0.47	0.47	2.86	2.86	9.64	0.35 QAR	0.63	12.71
OMINVEST	0.304	-0.65	-0.65	-0.65	-0.65	-0.65	0.20 QAR	0.68	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
6-July- 22	23.36%	16.01%	0.06%	1.19%	0.41%	6.14%	17.49%	11.40%	5.72%	3.99%
13-July- 22	23.37%	16.02%	0.06%	1.20%	0.41%	6.14%	17.49%	11.38%	5.72%	3.99%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.71 % The leading sector best performance indices today are Energy 1.49 % Consumer Disc 0.31 % Telecom 0.82 % respectively

Telecommunication sector are up today by + 0.82 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 5.26 %

KSA

Saudi Armco has a positive performance today by + 1.93 %, SABIC have positive performance today by + 1.48 %

STC has a positive performance today by + 0.4 %, Al Rajhi Bank has a positive performance today by + 1 %

UAE

ETISALAT .AD has a positive performance today by + 1.33 %, FAB.AD has a negative performance today by -0.64 %



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