



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, July 18, 2022

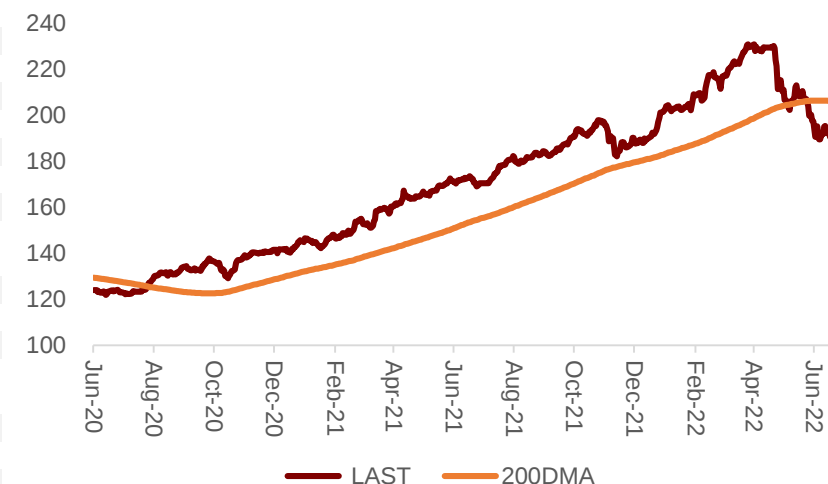




Market Watch Monday, July 18, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,555.08	2.33	3.51	0.28	0.28	2.42	11,391 SAR	1.95	17.97
Qatar (QE Index)	12,092.91	0.95	1.90	-0.81	-0.81	4.02	598 QAR	1.43	14.78
Dubai (DFMGI)	3,170.90	0.34	0.54	-1.63	-1.63	-0.78	432 AED	1.22	32.75
Abu Dhabi (ADI)	9,259.80	0.11	0.17	-1.23	-1.23	9.09	1,435 AED	2.06	19.89
Bahrain (BAX)	1,833.16	-0.60	-0.92	-0.35	-0.35	2.00	19 BHD	1.20	171.28
MUSCAT SE INDEX	4,201.05	1.41	1.45	1.90	1.90	1.73	5 OMR	0.92	13.25
SP GCC Comp LMC	192.06	1.46	2.41	-0.23	-0.23	1.23			
SP UAE PRICE INDEX	139.45	-0.04	0.33	-1.34	-1.34	-5.44			
Developed Markets									
MSCI World Index	2,567.68	-0.04	1.85	0.84	0.84	-20.55			
U.S. (S&P 500)	3,830.85	-0.84	1.07	1.20	1.20	-19.62			
U.K. (FTSE 100)	7,223.24	0.90	2.61	0.75	0.75	-2.18			
Japan (Topix)	1,892.50	0.00	-0.03	1.16	1.16	-5.01			
Emerging Markets									
MSCI EM Index	980.48	1.94	1.56	-2.02	-2.02	-20.42			
China (SSE Composite)	3,278.10	1.55	-0.11	-3.55	-3.55	-9.94			
India (Sensex)	54,521.15	1.41	2.07	2.83	2.83	-6.41			
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,414.03	0.01	0.73	0.07	0.07	5.27	44.22 KWD	2.35	22.39
Kuwait Premier Index	8,247.81	0.00	0.77	0.06	0.06	7.97	33.96 KWD	2.51	24.50
Kuwait Main Index	5,688.50	0.09	0.59	0.14	0.14	-3.36	10.26 KWD	1.82	15.46
NIC 50	9,285.53	0.36	0.76	0.05	0.05	8.95	28.60 KWD	2.49	23.50
Kuwait Sector									
Banking	1,785.44	-0.18	0.60	0.26	0.26	10.02	26.67 KWD	1.36	25.50
Telecom	1,211.80	0.66	1.48	0.16	0.16	11.24	3.71 KWD	0.87	13.78
Industrials	1,147.36	1.02	2.41	-1.43	-1.43	0.51	4.08 KWD	0.89	10.57
Financial services	1,388.56	0.26	1.27	1.22	1.22	-2.44	3.63 KWD	0.71	16.26
Real estate	1,205.20	-0.06	-0.76	0.00	0.00	-9.14	2.60 KWD	0.60	23.59
Basic materials	992.44	-1.93	-1.76	-2.02	-2.02	-3.16	0.88 KWD	1.47	9.77
Health care	462.76	-3.16	-3.23	-2.80	-2.80	-41.94	0.23 KWD	2.66	12.95
Consumer services	516.07	0.06	-0.92	-2.14	-2.14	-29.41	0.76 KWD	0.88	35.30
Insurance	1,529.18	-0.10	-0.95	-0.87	-0.87	-0.27	0.64 KWD	0.74	8.43
Consumer Disc	1,494.27	0.15	0.46	0.37	0.37	11.79	0.16 KWD	0.97	10.02
Energy	1,151.67	1.46	2.97	-1.41	-1.41	-19.36	0.24 KWD	0.84	15.68
Technology	712.22	0.93	3.05	1.98	1.98	4.15	0.01 KWD	0.85	0.00
Utilities	542.11	0.49	0.49	-0.48	-0.48	-9.65	0.23 KWD	2.59	15.88

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil futures inched lower in Asia trade after jumping around 5% on Monday, while international benchmark Brent crude was down 0.39% at \$105.86 per barrel

Kuwait Market

The market closed up today by +0.01% at 7,414.03 value traded 45.7 million KD, Premier market value traded reached 34.7 million KD and closed at 8,247.81 flat.

Saudi Market

The Market closed up today by +2.33%, 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.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



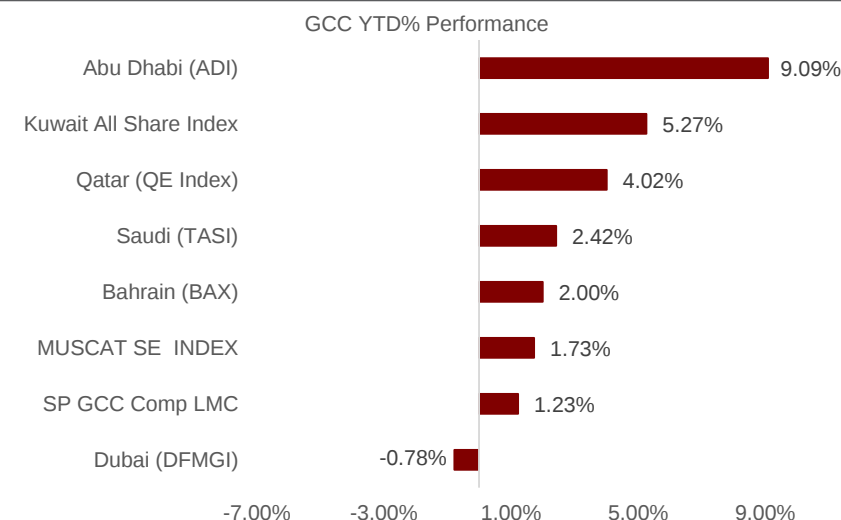
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.056	-0.19	-0.38	1.25	1.25	11.21	7.97 KWD	2.08	27.00
KFH	0.839	-0.36	0.84	-3.67	-3.67	10.93	7.78 KWD	3.72	32.00
Zain	0.600	0.67	1.35	1.01	1.01	0.84	2.59 KWD	2.29	13.78
BOUBYAN BANK	0.808	1.00	3.72	4.53	4.53	13.43	3.02 KWD	4.00	34.00
Agility	0.788	1.03	2.74	-3.08	-3.08	0.06	2.11 KWD	1.10	2.44
Saudi Arabia									
ARAMCO	38.50	4.19	6.21	-0.77	-0.77	18.30	8,468.65 SAR	7.07	18.23
SABIC	99.00	3.13	4.65	-2.56	-2.56	-14.66	296.95 SAR	1.58	35.00
STC	100.60	-0.59	-0.20	3.60	3.60	-10.50	201.17 SAR	2.86	17.74
AL-RAJHI BANK	83.00	2.34	3.36	0.61	0.61	-6.35	331.95 SAR	4.24	23.18
NCB	68.80	2.69	4.72	4.40	4.40	6.83	308.04 SAR	1.86	20.07
United Arab Emirates									
ETISALAT.AD	25.52	-1.39	-0.08	-2.22	-2.22	-19.50	221.94 AED	4.54	23.61
FAB.AD	18.66	0.32	-0.32	-0.64	-0.64	0.20	206.15 AED	1.86	13.90
EMIRATES NBD	12.30	-0.81	-0.40	-6.82	-6.82	-9.23	77.69 AED	0.95	8.47
DB ISLAMIC BK	5.55	-0.72	-0.18	-3.65	-3.65	3.16	40.19 AED	1.05	9.07
EMAAR PROPERT	5.31	2.71	2.71	2.12	2.12	8.59	43.43 AED	0.69	7.16
Qatar									
QNB	19.30	0.00	1.63	-3.40	-3.40	-4.41	179.10 QAR	1.75	14.31
INDUSTRIES QAT	15.13	1.54	3.00	-5.14	-5.14	-2.32	90.57 QAR	2.49	9.66
QA ISLAMIC BK	23.00	-0.09	0.00	3.37	3.37	25.48	54.65 QAR	2.24	15.20
MASRAF AL RAYA	3.94	0.79	1.68	-4.72	-4.72	-15.19	36.48 QAR	1.17	17.76
MESAIEED PETRO	2.53	0.00	-1.56	1.61	1.61	21.05	31.93 QAR	1.97	16.50
OMAN									
BANK MUSCAT	0.534	0.00	0.38	1.14	1.14	15.85	2.01 OMR	0.96	8.33
OMANTEL	0.900	1.35	2.74	3.21	3.21	19.68	0.68 OMR	1.21	7.69
BANK DHOFAR	0.115	0.00	0.88	-1.71	-1.71	-8.73	0.35 QAR	0.49	14.93
NAT BANK OF OMAN	0.224	3.70	4.19	6.67	6.67	13.71	0.37 QAR	0.65	12.71
OMINVEST	0.306	0.66	0.00	0.00	0.00	0.00	0.21 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 + 0.01 %The leading sector best performance indices today are Consumer Disc 0.15 % Telecom 0.66 % Energy 1.46 % respectively

Telecommunication sector is up today by + 0.66 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 5.97 %

KSA

Saudi Armco has a positive performance today by + 4.19 %, SABIC has a positive performance today by + 3.13 %

STC has a negative performance today by -0.59 %, Al Rajhi Bank has a positive performance today by + 2.34 %

UAE

ETISALAT AD has a negative performance today by -1.39 %, FAB.AD has a positive performance today by + 0.32 %



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