

شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, July 20, 2022



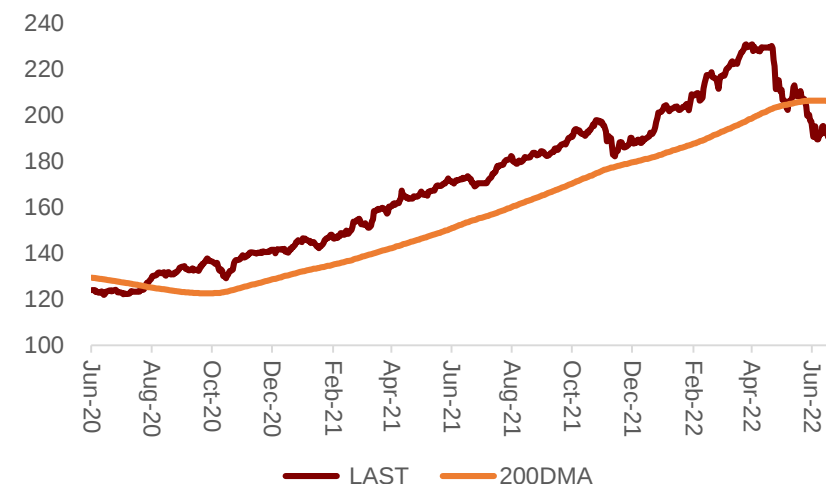


Market Watch

Wednesday, July 20, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,864.34	0.88	6.28	2.96	2.96	5.16	11,566 SAR	1.99	18.66
Qatar (QE Index)	12,537.58	3.37	5.64	2.84	2.84	7.84	617 QAR	1.49	15.34
Dubai (DFMGI)	3,211.66	0.79	1.83	-0.36	-0.36	0.49	439 AED	1.24	32.88
Abu Dhabi (ADI)	9,398.77	0.98	1.67	0.26	0.26	10.73	1,435 AED	2.06	19.83
Bahrain (BAX)	1,846.47	0.73	-0.20	0.37	0.37	2.74	19 BHD	1.19	171.25
MUSCAT SE INDEX	4,280.81	0.96	3.37	3.84	3.84	3.66	5 OMR	0.93	13.25
SP GCC Comp LMC	197.39	1.44	5.25	2.54	2.54	4.03			
SP UAE PRICE INDEX	143.51	1.99	3.25	1.53	1.53	-2.68			
Developed Markets									
MSCI World Index	2,643.93	0.59	4.88	3.84	3.84	-18.19			
U.S. (S&P 500)	3,959.90	0.59	4.47	4.61	4.61	-16.92			
U.K. (FTSE 100)	7,264.31	-0.44	3.19	1.33	1.33	-1.63			
Japan (Topix)	1,946.44	2.29	2.82	4.04	4.04	-2.30			
Emerging Markets									
MSCI EM Index	986.57	0.68	2.19	-1.41	-1.41	-19.92			
China (SSE Composite)	3,304.72	0.77	0.70	-2.76	-2.76	-9.21			
India (Sensex)	55,397.53	1.15	3.71	4.49	4.49	-4.90			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,542.85	1.28	2.48	1.81	1.81	7.09	45.06 KWD	2.38	21.44
Kuwait Permier Index	8,398.42	1.35	2.61	1.88	1.88	9.94	34.65 KWD	2.54	23.19
Kuwait Main Index	5,769.13	1.06	2.01	1.56	1.56	-1.99	10.41 KWD	1.84	15.66
NIC 50	9,451.96	1.79	2.60	1.87	1.87	10.91	28.60 KWD	2.52	22.19
Kuwait Sector									
Banking	1,812.98	1.17	2.15	1.81	1.81	11.72	27.12 KWD	1.39	24.19
Telecom	1,222.80	0.82	2.40	1.07	1.07	12.25	3.75 KWD	0.91	13.19
Industrials	1,195.18	2.65	6.68	2.68	2.68	4.70	4.26 KWD	0.95	10.66
Financial services	1,417.60	1.57	3.39	3.34	3.34	-0.40	3.70 KWD	0.73	17.20
Real estate	1,236.38	1.86	1.81	2.59	2.59	-6.79	2.67 KWD	0.61	24.23
Basic materials	990.01	0.00	-2.00	-2.26	-2.26	-3.39	0.88 KWD	1.45	9.80
Health care	462.15	0.00	-3.35	-2.92	-2.92	-42.02	0.23 KWD	2.66	12.90
Consumer services	519.14	1.54	-0.33	-1.56	-1.56	-28.99	0.77 KWD	0.89	36.56
Insurance	1,530.47	0.17	-0.86	-0.78	-0.78	-0.19	0.64 KWD	0.73	8.50
Consumer Disc	1,517.77	0.77	2.04	1.95	1.95	13.55	0.16 KWD	0.96	10.14
Energy	1,152.02	0.29	3.00	-1.38	-1.38	-19.33	0.24 KWD	0.83	15.59
Technology	723.86	1.63	4.74	3.65	3.65	5.85	0.01 KWD	0.87	0.00
Utilities	528.95	-0.98	-1.95	-2.90	-2.90	-11.84	0.22 KWD	2.53	15.50

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices fell more than \$1 a barrel on Wednesday, under pressure from global central bank efforts to limit inflation and ahead of expected builds in U.S. crude inventories as fuel demand weakens, Brent crude prices for September fell \$1.06, or 0.9%, to \$106.29 a barrel.

Kuwait Market

The market closed up today by +1.28% at 7,542.85 value traded 75.1 million KD, Premier market value traded reached 56.4 million KD and closed at 8,398.42 up by +1.35%.

Saudi Market

The Market closed up today by +0.88%, 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



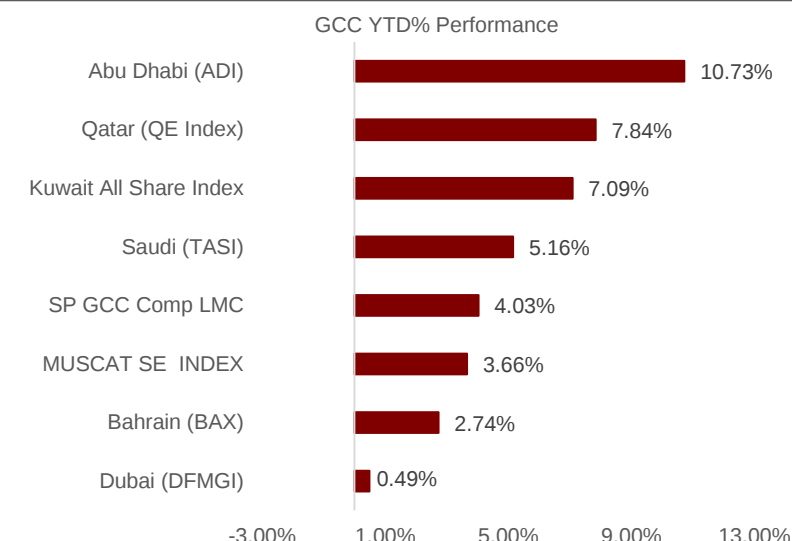
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.063	0.19	0.28	1.92	1.92	11.95	8.04 KWD	2.10	27.00
KFH	0.855	1.79	2.76	-1.84	-1.84	13.04	7.95 KWD	3.79	32.00
Zain	0.602	0.50	1.69	1.35	1.35	1.18	2.61 KWD	2.19	13.19
BOUBYAN BANK	0.817	1.36	4.88	5.69	5.69	14.69	3.06 KWD	4.04	34.00
Agility	0.840	4.22	9.52	3.32	3.32	6.67	2.25 KWD	1.17	2.60
Saudi Arabia									
ARAMCO	38.90	0.39	7.31	0.26	0.26	19.53	8,564.84 SAR	7.14	19.12
SABIC	98.20	-1.41	3.81	-3.35	-3.35	-15.34	294.84 SAR	1.57	35.00
STC	101.00	0.40	0.20	4.02	4.02	-10.14	202.16 SAR	2.87	17.64
AL-RAJHI BANK	87.50	3.06	8.97	6.06	6.06	-1.27	350.28 SAR	4.47	24.27
NCB	68.40	-0.73	4.11	3.79	3.79	6.21	306.54 SAR	1.84	20.64
United Arab Emirates									
ETISALAT.AD	27.24	4.61	6.66	4.37	4.37	-14.07	236.89 AED	4.84	25.20
FAB.AD	19.08	1.49	1.92	1.60	1.60	2.46	210.78 AED	1.90	14.21
EMIRATES NBD	12.70	2.01	2.83	-3.79	-3.79	-6.27	80.22 AED	0.98	8.75
DB ISLAMIC BK	5.57	1.09	0.18	-3.30	-3.30	3.53	40.33 AED	1.05	9.10
EMAAR PROPERT	5.37	0.56	3.87	3.27	3.27	9.82	43.92 AED	0.69	7.24
Qatar									
QNB	19.79	5.27	4.21	-0.95	-0.95	-1.98	180.96 QAR	1.80	14.68
INDUSTRIES QAT	15.96	5.00	8.65	0.06	0.06	3.03	95.59 QAR	2.67	10.35
QA ISLAMIC BK	24.24	2.80	5.39	8.94	8.94	32.24	56.71 QAR	2.27	16.00
MASRAF AL RAYA	3.98	1.27	2.84	-3.63	-3.63	-14.22	36.64 QAR	1.19	18.11
MESAIEED PETRO	2.64	3.45	2.61	5.90	5.90	26.17	32.80 QAR	2.05	17.20
OMAN									
BANK MUSCAT	0.538	0.37	1.13	1.89	1.89	16.71	2.02 OMR	0.97	8.33
OMANTEL	0.908	2.25	3.65	4.13	4.13	20.74	0.68 OMR	1.22	7.69
BANK DHOFAR	0.115	0.00	0.88	-1.71	-1.71	-8.73	0.34 QAR	0.49	14.93
NAT BANK OF OMAN	0.240	3.45	11.63	14.29	14.29	21.83	0.39 QAR	0.69	12.71
OMINVEST	0.308	0.65	0.65	0.65	0.65	0.65	0.21 QAR	0.68	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
13-July- 22	23.37%	16.02%	0.06%	1.20%	0.41%	6.14%	17.49%	11.38%	5.72%	3.99%
20-July- 22	23.37%	15.99%	0.06%	1.20%	0.41%	6.15%	17.48%	11.29%	5.72%	4.00%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 1.28 %The leading sector best performance indices today are Telecom 0.82 % Financial services 1.57 % Energy 0.29 % 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 + 5.16 %

KSA

Saudi Armco has a positive performance today by + 0.39 %, SABIC have negative performance today by -1.40 %

STC has a positive performance today by + 0.4 %, Al Rajhi Bank has a positive performance today by + 3.06 %

UAE

ETISALAT .AD has a positive performance today by + 4.61 %, FAB.AD has a positive performance today by + 1.49 %



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