

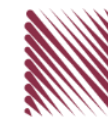


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, July 24, 2022



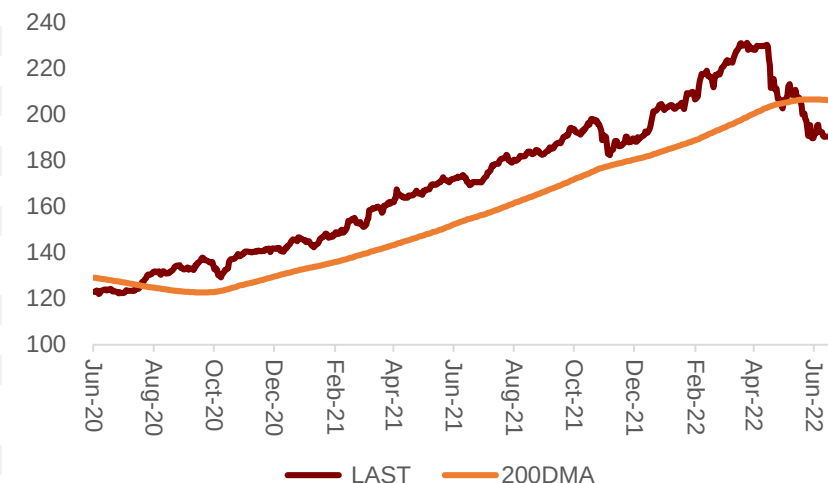


Market Watch

Sunday, July 24, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,975.14	-0.11	-0.11	3.92	3.92	6.15	11,549 SAR	2.00	19.07
Qatar (QE Index)	12,750.83	0.33	0.33	4.59	4.59	9.68	635 QAR	1.53	15.60
Dubai (DFMGI)	3,256.96	0.03	0.03	1.04	1.04	1.91	443 AED	1.26	33.17
Abu Dhabi (ADI)	9,662.23	0.67	0.67	3.07	3.07	13.83	1,435 AED	2.07	19.79
Bahrain (BAX)	1,886.60	0.71	0.71	2.55	2.55	4.97	20 BHD	1.20	171.25
MUSCAT SE INDEX	4,317.60	0.61	0.61	4.73	4.73	4.55	5 OMR	0.93	13.25
SP GCC Comp LMC	200.42	-0.14	-0.14	4.11	4.11	5.63			
SP UAE PRICE INDEX	147.21	-0.05	-0.05	4.15	4.15	-0.18			
Developed Markets									
MSCI World Index	2,650.82	-0.49	-0.49	4.11	4.11	-17.98			
U.S. (S&P 500)	3,961.63	-0.93	-0.93	4.66	4.66	-16.88			
U.K. (FTSE 100)	7,276.37	0.08	0.08	1.49	1.49	-1.46			
Japan (Topix)	1,955.97	0.28	0.28	4.55	4.55	-1.82			
Emerging Markets									
MSCI EM Index	990.37	-0.03	-0.03	-1.03	-1.03	-19.61			
China (SSE Composite)	3,269.97	-0.06	-0.06	-3.79	-3.79	-10.16			
India (Sensex)	56,072.23	0.70	0.70	5.76	5.76	-3.74			
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,661.84	-0.12	-0.12	3.42	3.42	8.78	45.73 KWD	2.36	21.73
Kuwait Premier Index	8,546.66	-0.29	-0.29	3.68	3.68	11.88	35.26 KWD	2.51	23.52
Kuwait Main Index	5,820.82	0.53	0.53	2.47	2.47	-1.11	10.48 KWD	1.85	15.74
NIC 50	9,613.98	-0.27	-0.30	3.67	3.67	12.81	28.60 KWD	2.49	22.52
Kuwait Sector									
Banking	1,842.30	-0.23	-0.23	3.45	3.45	13.53	27.54 KWD	1.38	24.52
Telecom	1,233.13	0.54	0.54	1.92	1.92	13.20	3.78 KWD	0.91	13.24
Industrials	1,242.81	0.28	0.28	6.77	6.77	8.88	4.43 KWD	0.94	10.78
Financial services	1,429.84	-0.10	-0.10	4.23	4.23	0.46	3.71 KWD	0.77	16.97
Real estate	1,246.89	-0.20	-0.20	3.46	3.46	-6.00	2.69 KWD	0.60	24.03
Basic materials	998.92	-0.91	-0.91	-1.38	-1.38	-2.52	0.89 KWD	1.48	9.83
Health care	462.15	0.00	0.00	-2.92	-2.92	-42.02	0.23 KWD	2.66	12.90
Consumer services	543.82	-0.19	-0.19	3.12	3.12	-25.62	0.78 KWD	0.93	38.42
Insurance	1,536.63	-0.31	-0.31	-0.39	-0.39	0.21	0.64 KWD	0.74	8.60
Consumer Disc	1,516.86	-0.30	-0.30	1.89	1.89	13.48	0.17 KWD	1.00	10.67
Energy	1,167.04	1.43	1.43	-0.10	-0.10	-18.28	0.24 KWD	0.82	15.52
Technology	723.86	2.58	2.58	3.65	3.65	5.85	0.01 KWD	0.87	0.00
Utilities	526.32	-1.48	-1.48	-3.38	-3.38	-12.28	0.22 KWD	2.51	15.42

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices fell on Friday on a weakening global demand outlook and the resumption of some Libyan crude oil output, Brent crude futures settled 0.64% lower at \$103.20 per barrel.

Kuwait Market

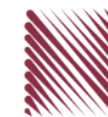
The market closed down today by -0.12% at 7,661.84 value traded 72.5 million KD, Premier market value traded reached 51.6 million KD and closed at 8,546.66 down by -0.29%.

Saudi Market

The Market closed down today by -0.11%, 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



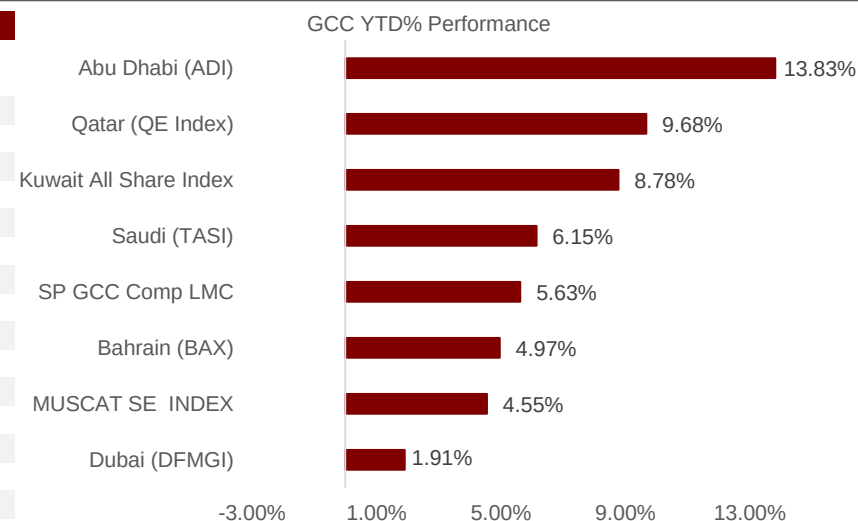
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.064	0.00	0.00	2.01	2.01	12.06	8.03 KWD	2.06	27.00
KFH	0.875	-1.91	-1.91	0.46	0.46	15.69	8.12 KWD	3.88	32.00
Zain	0.604	-0.66	-0.66	1.68	1.68	1.51	2.61 KWD	2.20	13.24
BOUBYAN BANK	0.828	1.35	1.35	7.12	7.12	16.23	3.09 KWD	3.34	34.00
Agility	0.897	0.79	0.79	10.33	10.33	13.90	2.40 KWD	1.25	2.78
Saudi Arabia									
ARAMCO	38.70	0.13	0.13	-0.26	-0.26	18.91	8,516.95 SAR	7.11	19.07
SABIC	98.30	0.31	0.31	-3.25	-3.25	-15.26	295.00 SAR	1.57	35.00
STC	100.80	-0.20	-0.20	3.81	3.81	-10.32	201.67 SAR	2.86	17.71
AL-RAJHI BANK	88.20	-0.90	-0.90	6.91	6.91	-0.48	352.92 SAR	4.50	25.44
NCB	69.60	0.00	0.00	5.61	5.61	8.07	311.78 SAR	1.88	20.85
United Arab Emirates									
ETISALAT.AD	27.80	-1.91	-1.91	6.51	6.51	-12.30	241.76 AED	4.94	25.72
FAB.AD	19.98	1.42	1.42	6.39	6.39	7.29	220.72 AED	1.99	14.88
EMIRATES NBD	12.80	-1.16	-1.16	-3.03	-3.03	-5.54	80.85 AED	0.99	8.82
DB ISLAMIC BK	5.80	0.35	0.35	0.69	0.69	7.81	41.99 AED	1.10	9.48
EMAAR PROPERT	5.37	-0.19	-0.19	3.27	3.27	9.82	43.92 AED	0.69	7.24
Qatar									
QNB	20.52	0.49	0.49	2.70	2.70	1.63	189.53 QAR	1.87	15.22
INDUSTRIES QAT	15.83	-1.00	-1.00	-0.75	-0.75	2.19	95.77 QAR	2.65	10.27
QA ISLAMIC BK	24.99	-0.04	-0.04	12.31	12.31	36.33	59.05 QAR	2.34	16.50
MASRAF AL RAYA	4.00	1.06	1.06	-3.17	-3.17	-13.81	37.19 QAR	1.56	20.01
MESAIEED PETRO	2.71	-0.37	-0.37	8.84	8.84	29.67	34.05 QAR	2.11	17.68
OMAN									
BANK MUSCAT	0.542	0.00	0.00	2.65	2.65	17.58	2.03 OMR	0.97	8.33
OMANTEL	0.932	4.95	1.30	6.88	6.88	23.94	0.70 OMR	1.25	7.69
BANK DHOFAR	0.128	8.47	8.47	9.40	9.40	1.59	0.38 QAR	0.55	14.93
NAT BANK OF OMAN	0.240	0.00	0.00	14.29	14.29	21.83	0.39 QAR	0.69	12.71
OMINVEST	0.312	1.30	1.30	1.96	1.96	1.96	0.21 QAR	0.69	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 down today by -0.12 %The leading sector bottom performance indices today are Technology 2.58 % Real estate -0.2 % Consumer services -0.19 % respectively

Telecommunication sector are up today by + 0.54 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 4.42 %

KSA

Saudi Armco has a positive performance today by + 0.13 %, SABIC has a positive performance today by + 0.30 %

STC has a negative performance today by -0.2 %, Al Rajhi Bank has a negative performance today by -0.9 %

UAE

ETISALAT .AD has a negative performance today by -1.91 %, FAB.AD has a positive performance today by + 1.42 %



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