



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, July 25, 2022



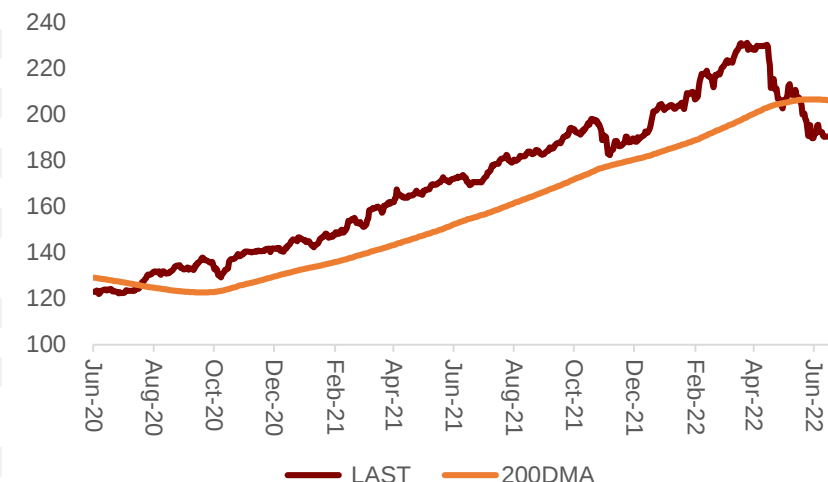


Market Watch

Monday, July 25, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,874.22	-0.84	-0.95	3.05	3.05	5.25	11,494 SAR	1.96	19.07
Qatar (QE Index)	12,799.58	0.38	0.71	4.99	4.99	10.10	638 QAR	1.54	15.65
Dubai (DFMGI)	3,235.90	-0.65	-0.62	0.39	0.39	1.25	440 AED	1.25	33.06
Abu Dhabi (ADI)	9,589.27	-0.76	-0.09	2.29	2.29	12.97	1,435 AED	2.06	19.81
Bahrain (BAX)	1,888.95	0.12	0.84	2.68	2.68	5.10	20 BHD	1.19	171.24
MUSCAT SE INDEX	4,298.91	-0.43	0.17	4.28	4.28	4.10	5 OMR	0.93	13.25
SP GCC Comp LMC	198.96	-0.73	-0.87	3.35	3.35	4.86			
SP UAE PRICE INDEX	145.25	-1.33	-1.38	2.76	2.76	-1.51			
Developed Markets									
MSCI World Index	2,651.22	0.02	-0.47	4.12	4.12	-17.96			
U.S. (S&P 500)	3,966.84	0.13	-0.80	4.79	4.79	-16.77			
U.K. (FTSE 100)	7,306.30	0.41	0.49	1.91	1.91	-1.06			
Japan (Topix)	1,943.21	-0.65	-0.38	3.87	3.87	-2.47			
Emerging Markets									
MSCI EM Index	987.08	-0.33	-0.36	-1.36	-1.36	-19.88			
China (SSE Composite)	3,250.39	-0.60	-0.66	-4.36	-4.36	-10.70			
India (Sensex)	55,766.22	-0.55	0.15	5.18	5.18	-4.27			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,699.88	0.50	0.38	3.93	3.93	9.32	45.91 KWD	2.37	21.94
Kuwait Premier Index	8,572.43	0.30	0.01	3.99	3.99	12.22	35.33 KWD	2.52	23.71
Kuwait Main Index	5,891.32	1.21	1.75	3.71	3.71	0.09	10.57 KWD	1.86	16.06
NIC 50	9,645.95	0.33	0.00	3.98	3.98	13.18	28.60 KWD	2.50	22.71
Kuwait Sector									
Banking	1,848.11	0.32	0.09	3.78	3.78	13.89	27.60 KWD	1.38	24.71
Telecom	1,271.31	3.10	3.65	5.08	5.08	16.70	3.90 KWD	1.07	13.26
Industrials	1,237.48	-0.43	-0.15	6.31	6.31	8.41	4.40 KWD	0.94	10.93
Financial services	1,442.61	0.89	0.79	5.16	5.16	1.36	3.73 KWD	0.78	17.42
Real estate	1,251.41	0.36	0.16	3.83	3.83	-5.65	2.70 KWD	0.61	24.37
Basic materials	1,004.58	0.57	-0.35	-0.82	-0.82	-1.97	0.90 KWD	1.47	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	549.30	1.01	0.82	4.16	4.16	-24.87	0.78 KWD	0.95	39.60
Insurance	1,520.31	-1.06	-1.37	-1.44	-1.44	-0.85	0.63 KWD	0.74	8.51
Consumer Disc	1,515.88	-0.06	-0.37	1.82	1.82	13.41	0.17 KWD	1.01	10.82
Energy	1,136.05	-2.66	-1.27	-2.75	-2.75	-20.45	0.24 KWD	0.78	15.20
Technology	723.86	0.00	2.58	3.65	3.65	5.85	0.01 KWD	0.87	0.00
Utilities	528.95	0.50	-0.98	-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

Russia tightened its gas squeeze on Europe on Monday as Gazprom said supplies through the Nord Stream I pipeline to Germany would drop to just 20% of capacity. Oil futures rose in Asia trade, Brent crude rose 1.46% to \$106.68 per barrel.

Kuwait Market

The market closed up today by +0.50% at 7,699.88 value traded 56.9 million KD, Premier market value traded reached 41.0 million KD and closed at 8,572.43 up by +0.30%.

Saudi Market

The Market closed down today by -0.84%, 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



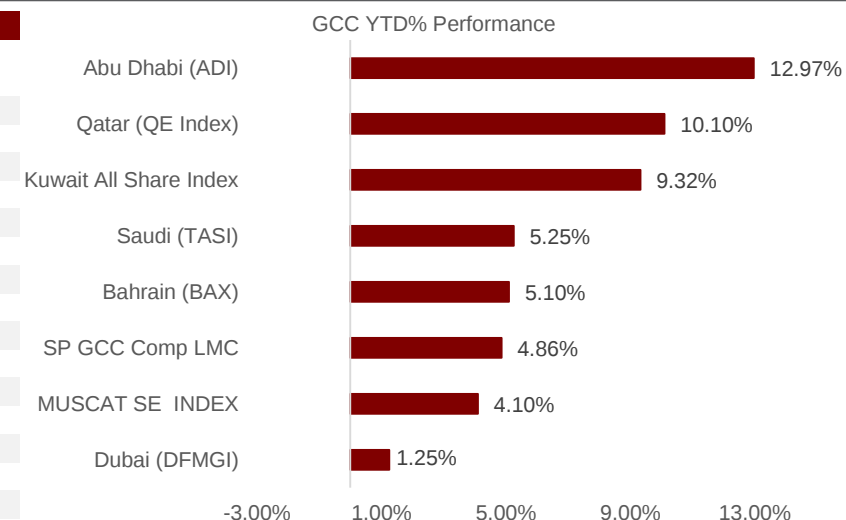
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.060	-0.38	-0.38	1.63	1.63	11.63	8.00 KWD	2.06	27.00
KFH	0.880	0.57	-1.35	1.03	1.03	16.35	8.17 KWD	3.90	32.00
Zain	0.605	0.17	-0.49	1.85	1.85	1.68	2.62 KWD	2.20	13.26
BOUBYAN BANK	0.838	1.21	2.57	8.41	8.41	17.64	3.13 KWD	3.38	34.00
Agility	0.886	-1.23	-0.45	8.98	8.98	12.51	2.37 KWD	1.24	2.75
Saudi Arabia									
ARAMCO	38.60	-0.26	-0.13	-0.52	-0.52	18.60	8,491.77 SAR	7.09	19.09
SABIC	97.60	-0.71	-0.41	-3.94	-3.94	-15.86	292.79 SAR	1.56	35.00
STC	99.60	-1.19	-1.39	2.57	2.57	-11.39	199.19 SAR	2.83	17.67
AL-RAJHI BANK	87.30	-1.02	-1.91	5.82	5.82	-1.50	349.19 SAR	4.46	25.21
NCB	68.70	-1.29	-1.29	4.25	4.25	6.68	307.63 SAR	1.85	20.85
United Arab Emirates									
ETISALAT.AD	27.10	-2.52	-4.38	3.83	3.83	-14.51	235.70 AED	4.82	25.07
FAB.AD	19.66	-1.60	-0.20	4.69	4.69	5.57	217.21 AED	1.96	14.64
EMIRATES NBD	12.65	-1.17	-2.32	-4.17	-4.17	-6.64	79.91 AED	0.98	8.72
DB ISLAMIC BK	5.82	0.34	0.69	1.04	1.04	8.18	42.14 AED	1.10	9.51
EMAAR PROPERT	5.25	-2.23	-2.42	0.96	0.96	7.36	42.95 AED	0.68	7.08
Qatar									
QNB	20.50	-0.10	0.39	2.60	2.60	1.54	190.09 QAR	1.86	15.20
INDUSTRIES QAT	15.76	-0.44	-1.44	-1.19	-1.19	1.74	95.72 QAR	2.64	10.22
QA ISLAMIC BK	25.32	1.32	1.28	13.80	13.80	38.13	60.06 QAR	2.37	16.72
MASRAF AL RAYA	4.01	0.28	1.34	-2.91	-2.91	-13.58	37.44 QAR	1.56	20.06
MESAIEED PETRO	2.64	-2.58	-2.94	6.02	6.02	26.32	33.30 QAR	2.06	17.22
OMAN									
BANK MUSCAT	0.538	-0.74	-0.74	1.89	1.89	16.71	2.02 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	0.00	8.47	9.40	9.40	1.59	0.38 QAR	0.55	14.93
NAT BANK OF OMAN	0.232	-3.33	-3.33	10.48	10.48	17.77	0.38 QAR	0.67	12.71
OMINVEST	0.312	0.00	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 up today by + 0.5 %The leading sector best performance indices today are Banking 0.32 % Health care 0 % Industrials -0.43 % respectively

Telecommunication sector is up today by + 3.1 % and act defensively in COVID19 also it outperformed Kuwait all Share Index in YTD perspective by + 7.38 %

KSA

Saudi Armco has a negative performance today by -0.26 %, SABIC has a negative performance today by -0.71 %

STC has a negative performance today by -1.19 %, Al Rajhi Bank has a negative performance today by -1.02 %

UAE

ETISALAT .AD has a negative performance today by -2.52 %, FAB.AD has a negative performance today by -1.6 %



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