

شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, July 3, 2022



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



Market Watch Sunday, July 3, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,464.98	-0.51	-0.51	-0.51	-0.51	1.62	11,403 SAR	1.99	18.52
Qatar (QE Index)	12,272.24	0.66	0.66	0.66	0.66	5.56	617 QAR	1.52	14.82
Dubai (DFMGI)	3,201.81	-0.67	-0.67	-0.67	-0.67	0.18	438 AED	1.31	33.81
Abu Dhabi (ADI)	9,344.62	-0.32	-0.32	-0.32	-0.32	10.09	1,435 AED	1.98	19.93
Bahrain (BAX)	1,865.79	1.42	1.42	1.42	1.42	3.81	19 BHD	1.18	171.31
MUSCAT SE INDEX	4,108.67	-0.34	-0.34	-0.34	-0.34	-0.51	5 OMR	0.91	13.25
SP GCC Comp LMC	192.15	-0.19	-0.19	-0.19	-0.19	1.27			
SP UAE PRICE INDEX	140.38	-0.68	-0.68	-0.68	-0.68	-4.81			

Developed Markets

MSCI World Index	2,559.95	0.54	0.54	0.54	0.54	-20.79			
U.S. (S&P 500)	3,825.33	1.06	1.06	1.06	1.06	-19.74			
U.K. (FTSE 100)	7,168.65	-0.01	-0.01	-0.01	-0.01	-2.92			
Japan (Topix)	1,845.04	-1.38	-1.38	-1.38	-1.38	-7.39			

Emerging Markets

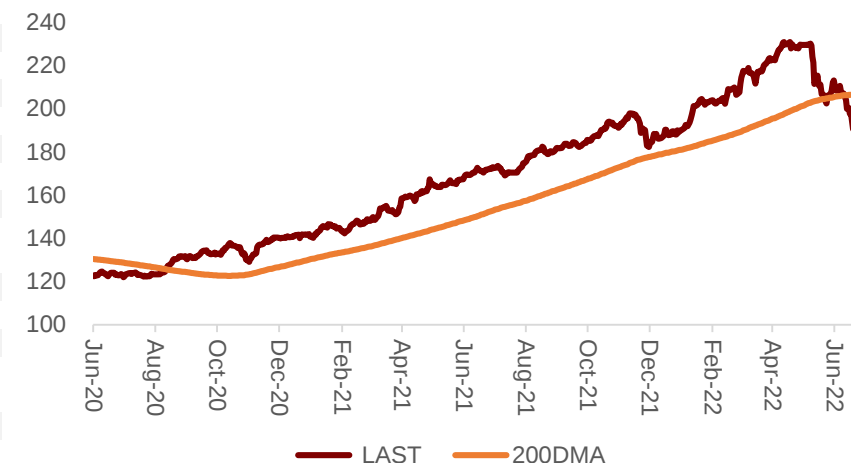
MSCI EM Index	992.84	-0.78	-0.78	-0.78	-0.78	-19.41			
China (SSE Composite)	3,387.64	-0.32	-0.32	-0.32	-0.32	-6.93			
India (Sensex)	52,907.93	-0.21	-0.21	-0.21	-0.21	-9.18			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,467.92	0.80	0.80	0.80	0.80	6.03	44.55 KWD	2.46	22.47
Kuwait Premier Index	8,328.72	1.04	1.04	1.04	1.04	9.03	34.31 KWD	2.63	24.59
Kuwait Main Index	5,677.55	-0.06	-0.06	-0.06	-0.06	-3.55	10.24 KWD	1.88	15.38
NIC 50	9,237.24	0.21	1.03	1.03	1.03	8.39	28.60 KWD	2.61	23.59

Kuwait Sector

Banking	1,807.49	1.50	1.50	1.50	1.50	11.38	27.00 KWD	1.32	25.59
Telecom	1,206.28	-0.30	-0.30	-0.30	-0.30	10.73	3.70 KWD	0.87	13.69
Industrials	1,151.14	-1.11	-1.11	-1.11	-1.11	0.85	4.09 KWD	0.92	10.78
Financial services	1,372.35	0.04	0.04	0.04	0.04	-3.58	3.54 KWD	0.73	16.67
Real estate	1,208.15	0.24	0.24	0.24	0.24	-8.92	2.61 KWD	0.62	22.76
Basic materials	1,013.71	0.08	0.08	0.08	0.08	-1.08	0.90 KWD	1.49	9.79
Health care	478.19	0.45	0.45	0.45	0.45	-40.00	0.24 KWD	2.80	12.97
Consumer services	529.47	0.40	0.40	0.40	0.40	-27.58	0.77 KWD	0.87	33.84
Insurance	1,541.95	-0.04	-0.04	-0.04	-0.04	0.56	0.64 KWD	0.75	8.48
Consumer Disc	1,495.91	0.48	0.48	0.48	0.48	11.92	0.16 KWD	1.00	10.24
Energy	1,153.29	-1.27	-1.27	-1.27	-1.27	-19.25	0.24 KWD	0.85	15.30
Technology	691.12	-1.04	-1.04	-1.04	-1.04	1.06	0.01 KWD	0.83	0.00
Utilities	544.74	0.00	0.00	0.00	0.00	-9.21	0.23 KWD	2.60	15.96

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices rose nearly 3% yesterday as supply outages in Libya and expected shutdowns in Norway outweighed expectations that an economic slowdown could dent demand, Brent crude futures were up \$2.71, or 2.5%, at \$111.74 a barrel.

Kuwait Market

The market closed up today by +0.80% at 7,467.92 value traded 53.8 million KD, Premier market value traded reached 44.1 million KD and closed at 8,328.72 up by +1.04%.

Saudi Market

The Market closed down today by -0.51%, GCC Market closed down as fears grew that fast-rising inflation will drive a sharp rise in interest rates that brings the global economy to a standstill.

DAILY MARKETS WRAP,

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Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.060	1.63	1.63	1.63	1.63	11.63	8.01 KWD	2.09	27.00
KFH	0.876	0.57	0.57	0.57	0.57	15.82	8.13 KWD	4.27	32.00
Zain	0.596	0.34	0.34	0.34	0.34	0.17	2.58 KWD	2.28	13.69
BOUBYAN BANK	0.782	1.16	1.16	1.16	1.16	9.78	2.92 KWD	3.87	34.00
Agility	0.796	-2.09	-2.09	-2.09	-2.09	1.08	2.13 KWD	0.92	2.07
Saudi Arabia									
ARAMCO	38.65	-0.39	-0.39	-0.39	-0.39	18.76	8,503.00 SAR	7.10	19.14
SABIC	101.80	0.20	0.20	0.20	0.20	-12.24	305.40 SAR	1.63	35.00
STC	97.60	0.51	0.51	0.51	0.51	-13.17	195.20 SAR	2.77	17.02
AL-RAJHI BANK	80.40	-2.55	-2.55	-2.55	-2.55	-9.28	321.60 SAR	4.11	23.58
NCB	66.50	0.91	0.91	0.91	0.91	3.26	297.79 SAR	1.79	19.74
United Arab Emirates									
ETISALAT.AD	25.80	-1.15	-1.15	-1.15	-1.15	-18.61	224.37 AED	4.59	23.87
FAB.AD	18.82	0.21	0.21	0.21	0.21	1.06	207.91 AED	1.87	14.02
EMIRATES NBD	12.80	-3.03	-3.03	-3.03	-3.03	-5.54	80.85 AED	0.99	8.82
DB ISLAMIC BK	5.64	-2.08	-2.08	-2.08	-2.08	4.83	40.84 AED	1.07	9.22
EMAAR PROPERT	5.20	0.00	0.00	0.00	0.00	6.34	42.53 AED	0.67	7.01
Qatar									
QNB	20.30	1.60	1.60	1.60	1.60	0.54	187.32 QAR	1.94	14.98
INDUSTRIES QAT	16.10	0.94	0.94	0.94	0.94	3.94	97.31 QAR	2.69	10.44
QA ISLAMIC BK	22.62	1.66	1.66	1.66	1.66	23.40	53.40 QAR	2.20	15.43
MASRAF AL RAYA	4.10	-0.68	-0.68	-0.68	-0.68	-11.59	38.15 QAR	1.23	18.66
MESAIEED PETRO	2.52	1.00	1.00	1.00	1.00	20.33	31.57 QAR	1.96	16.41
OMAN									
BANK MUSCAT	0.528	0.00	0.00	0.00	0.00	14.55	1.98 OMR	0.95	8.33
OMANTEL	0.872	-1.80	0.00	0.00	0.00	15.96	0.65 OMR	1.17	7.69
BANK DHOFAR	0.114	-2.56	-2.56	-2.56	-2.56	-9.52	0.34 QAR	0.49	14.93
NAT BANK OF OMAN	0.210	0.00	0.00	0.00	0.00	6.60	0.34 QAR	0.61	12.71
OMINVEST	0.300	-1.96	-1.96	-1.96	-1.96	-1.96	0.20 QAR	0.67	6.85

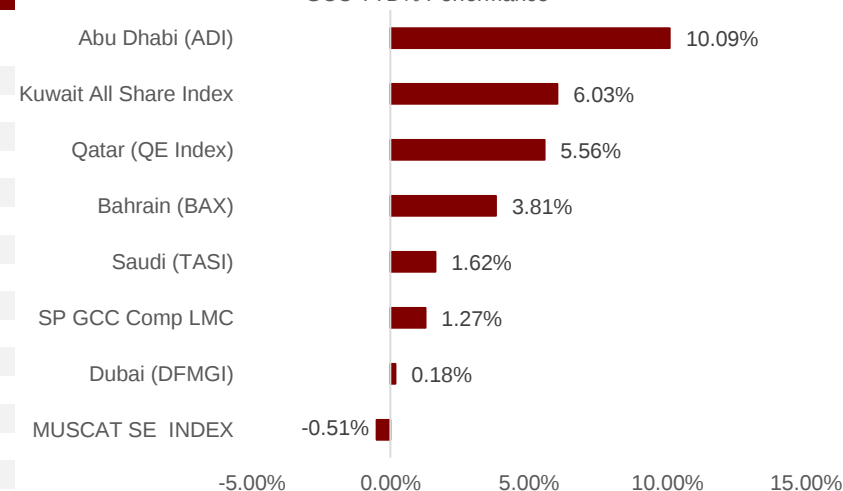
Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
22-June- 22	23.05%	15.83%	0.06%	1.07%	0.41%	6.37%	17.58%	11.37%	5.70%	3.99%
29-June- 22	23.28%	15.93%	0.06%	1.09%	0.41%	6.26%	17.50%	11.40%	5.73%	3.99%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC

GCC YTD% Performance



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.8 %The leading sector best performance indices today are Kuwait Sector 0 % Insurance -0.04 % Basic materials 0.08 % respectively

Telecommunication sector are down today by -0.3 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 4.7 %

KSA

Saudi Armco has a negative performance today by -0.39 %, SABIC has a positive performance today by + 0.20 %

STC has a positive performance today by + 0.51 %, Al Rajhi Bank has a negative performance today by -2.55 %

UAE

ETISALAT .AD has a negative performance today by -1.15 %, FAB.AD has a positive performance today by + 0.21 %



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