

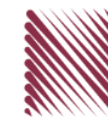


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, July 4, 2022

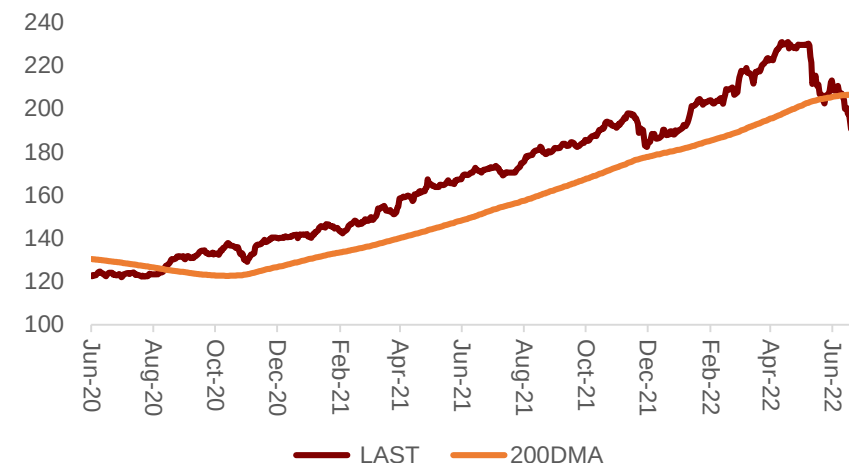




Market Watch

							Monday, July 4, 2022		
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,358.40	-0.93	-1.43	-1.43	-1.43	0.68	11,266 SAR	1.93	18.48
Qatar (QE Index)	12,217.35	-0.45	0.21	0.21	0.21	5.09	613 QAR	1.53	14.69
Dubai (DFMGI)	3,157.61	-1.38	-2.04	-2.04	-2.04	-1.20	434 AED	1.29	33.32
Abu Dhabi (ADI)	9,304.86	-0.43	-0.74	-0.74	-0.74	9.62	1,435 AED	1.96	19.79
Bahrain (BAX)	1,874.72	0.48	1.91	1.91	1.91	4.31	19 BHD	1.18	171.31
MUSCAT SE INDEX	4,116.13	0.18	-0.16	-0.16	-0.16	-0.32	5 OMR	0.91	13.25
SP GCC Comp LMC	190.68	-0.76	-0.95	-0.95	-0.95	0.50			
SP UAE PRICE INDEX	138.89	-1.06	-1.74	-1.74	-1.74	-5.82			
Developed Markets									
MSCI World Index	2,567.87	0.31	0.85	0.85	0.85	-20.54			
U.S. (S&P 500)	3,825.33	0.00	1.06	1.06	1.06	-19.74			
U.K. (FTSE 100)	7,232.65	0.89	0.88	0.88	0.88	-2.06			
Japan (Topix)	1,869.71	1.34	-0.06	-0.06	-0.06	-6.15			
Emerging Markets									
MSCI EM Index	992.80	0.00	-0.79	-0.79	-0.79	-19.42			
China (SSE Composite)	3,405.43	0.53	0.20	0.20	0.20	-6.44			
India (Sensex)	53,234.77	0.62	0.41	0.41	0.41	-8.62			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,452.62	-0.20	0.59	0.59	0.59	5.81	44.49 KWD	2.45	22.42
Kuwait Premier Index	8,313.25	-0.19	0.85	0.85	0.85	8.82	34.27 KWD	2.63	24.51
Kuwait Main Index	5,661.98	-0.27	-0.33	-0.33	-0.33	-3.81	10.22 KWD	1.86	15.44
NIC 50	9,338.08	1.09	0.84	0.84	0.84	9.57	28.60 KWD	2.61	23.51
Kuwait Sector									
Banking	1,805.48	-0.11	1.38	1.38	1.38	11.26	26.99 KWD	1.33	25.51
Telecom	1,206.22	0.00	-0.30	-0.30	-0.30	10.73	3.70 KWD	0.87	13.71
Industrials	1,146.48	-0.40	-1.51	-1.51	-1.51	0.44	4.08 KWD	0.92	10.64
Financial services	1,366.01	-0.46	-0.42	-0.42	-0.42	-4.03	3.53 KWD	0.73	16.17
Real estate	1,203.67	-0.37	-0.13	-0.13	-0.13	-9.25	2.60 KWD	0.61	23.07
Basic materials	1,013.75	0.00	0.09	0.09	0.09	-1.08	0.90 KWD	1.49	9.77
Health care	478.19	0.00	0.45	0.45	0.45	-40.00	0.24 KWD	2.80	12.97
Consumer services	521.23	-1.56	-1.17	-1.17	-1.17	-28.71	0.77 KWD	0.87	34.23
Insurance	1,542.79	0.05	0.01	0.01	0.01	0.61	0.64 KWD	0.76	8.54
Consumer Disc	1,487.35	-0.57	-0.10	-0.10	-0.10	11.28	0.16 KWD	0.98	10.09
Energy	1,118.43	-3.02	-4.26	-4.26	-4.26	-21.69	0.23 KWD	0.85	14.91
Technology	691.12	0.00	-1.04	-1.04	-1.04	1.06	0.01 KWD	0.83	0.00
Utilities	539.47	-0.97	-0.97	-0.97	-0.97	-10.09	0.23 KWD	2.58	15.81

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices fell in early Asian trade on Monday, paring gains from the previous session as fears of global recession weighed on the market even as supply remains tight amid lower OPEC output, unrest in Libya and sanctions on Russia, Brent crude futures slipped 35 cents, or 0.3%, to \$111.28 a barrel at 0016 GMT, having jumped 2.4% on Friday.

Kuwait Market

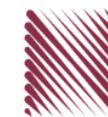
The market closed down today by - 0.20% at 7,452.62 value traded 48.3 million KD, Premier market value traded reached 40.2 million KD and closed at 8,313.25 down by -0.19%.

Saudi Market

The Market closed down today by -0.93%, 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,

NIC RESEARCH AND STUDIES DEP



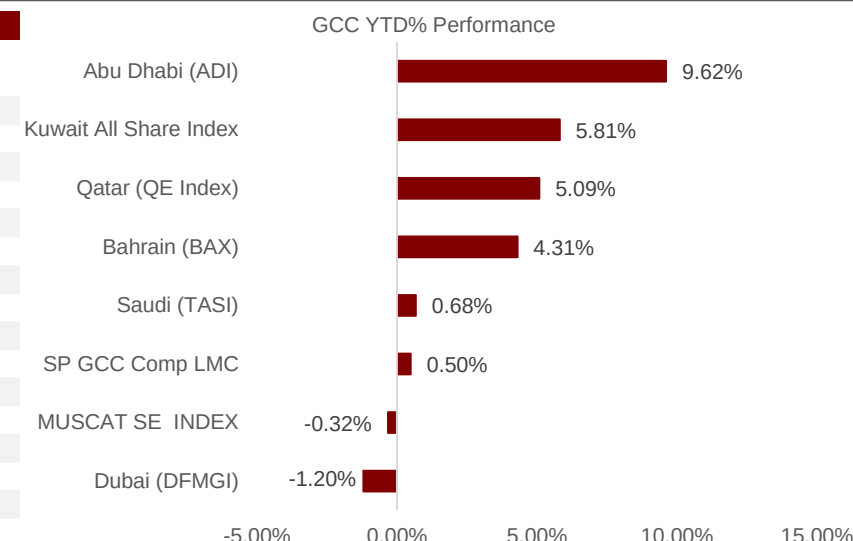
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.058	-0.19	1.44	1.44	1.44	11.42	7.99 KWD	2.09	27.00
KFH	0.875	-0.11	0.46	0.46	0.46	15.69	8.12 KWD	4.26	32.00
Zain	0.597	0.17	0.51	0.51	0.51	0.34	2.58 KWD	2.28	13.71
BOUBYAN BANK	0.777	-0.64	0.52	0.52	0.52	9.07	2.90 KWD	3.85	34.00
Agility	0.795	-0.13	-2.21	-2.21	-2.21	0.95	2.13 KWD	0.92	2.07
Saudi Arabia									
ARAMCO	38.15	-1.29	-1.68	-1.68	-1.68	17.22	8,393.00 SAR	7.01	19.07
SABIC	100.00	-1.77	-1.57	-1.57	-1.57	-13.79	300.00 SAR	1.60	35.00
STC	97.20	-0.41	0.10	0.10	0.10	-13.52	194.40 SAR	2.76	17.11
AL-RAJHI BANK	80.00	-0.50	-3.03	-3.03	-3.03	-9.73	320.00 SAR	4.08	22.98
NCB	65.80	-1.05	-0.15	-0.15	-0.15	2.17	294.65 SAR	1.77	19.92
United Arab Emirates									
ETISALAT.AD	25.60	-0.78	-1.92	-1.92	-1.92	-19.24	222.64 AED	4.55	23.68
FAB.AD	18.68	-0.74	-0.53	-0.53	-0.53	0.31	206.37 AED	1.86	13.91
EMIRATES NBD	12.50	-2.34	-5.30	-5.30	-5.30	-7.75	78.96 AED	0.97	8.61
DB ISLAMIC BK	5.55	-1.60	-3.65	-3.65	-3.65	3.16	40.19 AED	1.05	9.07
EMAAR PROPERT	5.03	-3.27	-3.27	-3.27	-3.27	2.86	41.14 AED	0.65	6.78
Qatar									
QNB	19.87	-2.12	-0.55	-0.55	-0.55	-1.58	183.53 QAR	1.89	14.66
INDUSTRIES QAT	15.85	-1.55	-0.63	-0.63	-0.63	2.32	95.89 QAR	2.65	10.28
QA ISLAMIC BK	22.90	1.24	2.92	2.92	2.92	24.93	54.11 QAR	2.23	15.62
MASRAF AL RAYA	4.10	-0.07	-0.75	-0.75	-0.75	-11.66	38.12 QAR	1.23	18.65
MESAIEED PETRO	2.54	0.87	1.89	1.89	1.89	21.39	31.87 QAR	1.98	16.55
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	0.00	-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	0.00	-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

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed and others authorized to receive it.

Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.2 %The leading sector bottom performance indices today are Consumer Disc -0.57 % Health care 0 % Technology 0 % respectively

Telecommunication sector are down today by 0 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 4.92 %

KSA

Saudi Armco has a negative performance today by -1.29 %, SABIC has a negative performance today by -1.77 %

STC has a negative performance today by -0.41 %, Al Rajhi Bank has a negative performance today by -0.5 %

UAE

ETISALAT .AD has a negative performance today by -0.78 %, FAB.AD has a negative performance today by -0.74 %



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw