



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

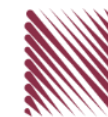
GCC DAILY MORNING BRIEF

Tuesday, July 5, 2022



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



Market Watch

Tuesday, July 5, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,344.57	-0.12	-1.55	-1.55	-1.55	0.56	11,299 SAR	1.92	18.14
Qatar (QE Index)	12,263.01	0.37	0.59	0.59	0.59	5.48	612 QAR	1.48	14.71
Dubai (DFMGI)	3,121.83	-1.13	-3.15	-3.15	-3.15	-2.32	429 AED	1.29	33.31
Abu Dhabi (ADI)	9,270.49	-0.37	-1.11	-1.11	-1.11	9.21	1,435 AED	1.96	19.80
Bahrain (BAX)	1,876.69	0.10	2.01	2.01	2.01	4.42	19 BHD	1.18	171.32
MUSCAT SE INDEX	4,118.76	0.06	-0.09	-0.09	-0.09	-0.26	5 OMR	0.92	13.25
SP GCC Comp LMC	190.11	-0.30	-1.24	-1.24	-1.24	0.20			
SP UAE PRICE INDEX	138.05	-0.60	-2.33	-2.33	-2.33	-6.38			

Developed Markets

MSCI World Index	2,553.95	-0.54	0.30	0.30	0.30	-20.97			
U.S. (S&P 500)	3,831.39	0.16	1.22	1.22	1.22	-19.61			
U.K. (FTSE 100)	7,025.47	-2.86	-2.01	-2.01	-2.01	-4.86			
Japan (Topix)	1,879.12	0.50	0.44	0.44	0.44	-5.68			

Emerging Markets

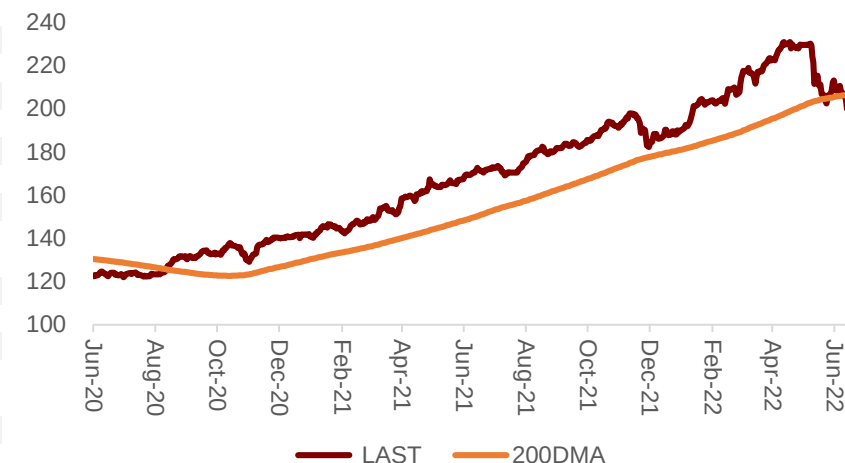
MSCI EM Index	991.47	-0.13	-0.92	-0.92	-0.92	-19.52			
China (SSE Composite)	3,404.03	-0.04	0.16	0.16	0.16	-6.48			
India (Sensex)	53,134.35	-0.19	0.22	0.22	0.22	-8.79			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,471.48	0.25	0.85	0.85	0.85	6.08	44.63 KWD	2.38	22.47
Kuwait Premier Index	8,329.52	0.20	1.05	1.05	1.05	9.04	34.36 KWD	2.54	24.56
Kuwait Main Index	5,688.20	0.46	0.13	0.13	0.13	-3.36	10.28 KWD	1.85	15.51
NIC 50	9,357.38	0.21	1.04	1.04	1.04	9.80	28.60 KWD	2.52	23.56

Kuwait Sector

Banking	1,810.98	0.30	1.69	1.69	1.69	11.60	27.09 KWD	1.33	25.56
Telecom	1,213.05	0.57	0.26	0.26	0.26	11.35	3.72 KWD	0.90	13.73
Industrials	1,134.57	-1.04	-2.53	-2.53	-2.53	-0.61	4.04 KWD	0.91	10.54
Financial services	1,378.33	0.90	0.48	0.48	0.48	-3.16	3.56 KWD	0.74	16.42
Real estate	1,209.84	0.51	0.38	0.38	0.38	-8.79	2.62 KWD	0.60	23.97
Basic materials	1,007.73	-0.59	-0.51	-0.51	-0.51	-1.66	0.90 KWD	1.46	9.75
Health care	478.19	0.00	0.45	0.45	0.45	-40.00	0.24 KWD	2.80	12.97
Consumer services	517.46	-0.72	-1.88	-1.88	-1.88	-29.22	0.78 KWD	0.89	35.22
Insurance	1,543.13	0.02	0.04	0.04	0.04	0.64	0.64 KWD	0.76	8.54
Consumer Disc	1,501.99	0.98	0.89	0.89	0.89	12.37	0.16 KWD	0.97	10.02
Energy	1,108.34	-0.90	-5.12	-5.12	-5.12	-22.39	0.23 KWD	0.84	14.60
Technology	691.12	0.00	-1.04	-1.04	-1.04	1.06	0.01 KWD	0.83	0.00
Utilities	539.47	0.00	-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 tumbled Tuesday with the U.S. benchmark falling below \$100 as recession fears grow, sparking fears that an economic slowdown will cut demand for petroleum products, International benchmark Brent crude settled 9.45%, or \$10.73, lower at \$102.77 per barrel.

Kuwait Market

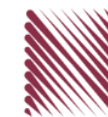
The market closed up today by + 0.25% at 7,471.48 value traded 44.4 million KD, Premier market value traded reached 38.0 million KD and closed at 8,329.52 up by +0.20%.

Saudi Market

The Market closed down today by -0.12%, 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



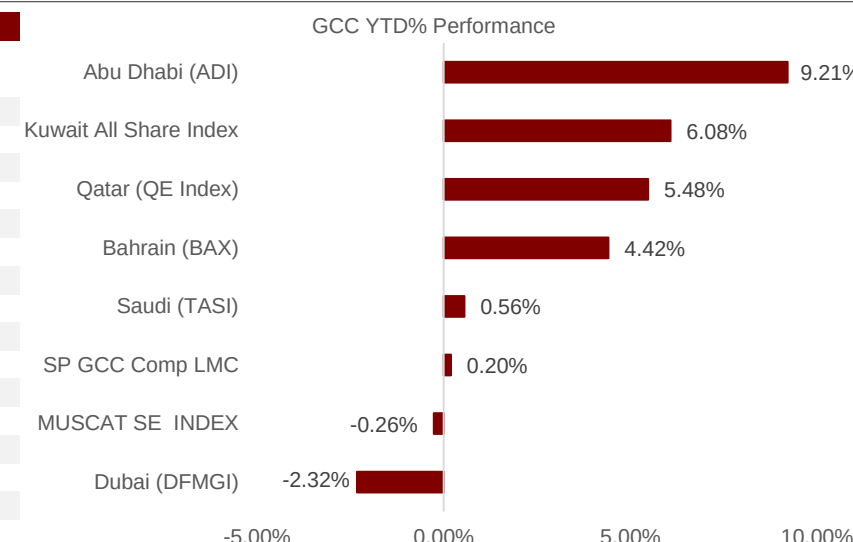
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.065	0.66	2.11	2.11	2.11	12.16	8.05 KWD	2.10	27.00
KFH	0.875	0.00	0.46	0.46	0.46	15.69	8.14 KWD	3.88	32.00
Zain	0.598	0.17	0.67	0.67	0.67	0.50	2.59 KWD	2.28	13.73
BOUBYAN BANK	0.776	-0.13	0.39	0.39	0.39	8.93	2.90 KWD	3.84	34.00
Agility	0.781	-1.76	-3.94	-3.94	-3.94	-0.83	2.09 KWD	0.91	2.03
Saudi Arabia									
ARAMCO	38.30	0.39	-1.29	-1.29	-1.29	17.68	8,428.69 SAR	7.03	18.82
SABIC	98.80	-1.20	-2.76	-2.76	-2.76	-14.83	296.49 SAR	1.58	35.00
STC	97.70	0.51	0.62	0.62	0.62	-13.08	195.46 SAR	2.77	17.04
AL-RAJHI BANK	80.00	0.00	-3.03	-3.03	-3.03	-9.73	320.10 SAR	4.08	22.87
NCB	66.30	0.76	0.61	0.61	0.61	2.95	296.99 SAR	1.79	19.71
United Arab Emirates									
ETISALAT.AD	25.72	0.47	-1.46	-1.46	-1.46	-18.86	223.69 AED	4.57	23.79
FAB.AD	18.50	-0.96	-1.49	-1.49	-1.49	-0.66	204.39 AED	1.84	13.78
EMIRATES NBD	12.15	-2.80	-7.95	-7.95	-7.95	-10.33	76.75 AED	0.94	8.37
DB ISLAMIC BK	5.50	-0.90	-4.51	-4.51	-4.51	2.23	39.83 AED	1.04	8.99
EMAAR PROPERT	5.03	0.00	-3.27	-3.27	-3.27	2.86	41.15 AED	0.65	6.78
Qatar									
QNB	19.65	-1.11	-1.65	-1.65	-1.65	-2.67	181.50 QAR	1.87	14.50
INDUSTRIES QAT	15.86	0.06	-0.56	-0.56	-0.56	2.39	95.95 QAR	2.65	10.29
QA ISLAMIC BK	23.71	3.54	6.56	6.56	6.56	29.35	56.03 QAR	2.30	16.17
MASRAF AL RAYA	4.08	-0.46	-1.21	-1.21	-1.21	-12.07	37.94 QAR	1.22	18.56
MESAIEED PETRO	2.56	0.71	2.61	2.61	2.61	22.25	32.10 QAR	1.99	16.67
OMAN									
BANK MUSCAT	0.526	-0.38	-0.38	-0.38	-0.38	14.11	1.98 OMR	0.94	8.33
OMANTEL	0.864	-2.70	-0.92	-0.92	-0.92	14.89	0.65 OMR	1.16	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	0.306	2.00	0.00	0.00	0.00	0.00	0.21 QAR	0.68	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 up today by + 0.25 %The leading sector best performance indices today are Insurance 0.02 % Industrials -1.04 % Banking 0.3 % respectively

Telecommunication sector are up today by + 0.57 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 5.27 %

KSA

Saudi Armco has a positive performance today by + 0.39 %, SABIC has a negative performance today by -1.2 %

STC has a positive performance today by + 0.51 %, Al Rajhi Bank flat performance today

UAE

ETISALAT .AD has a positive performance today by + 0.47 %, FAB.AD have negative performance today by -0.96 %



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