



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Monday, May 9<sup>th</sup> , 2022



# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



Market Watch Monday, May 9, 2022

| Description        | Close     | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|--------------------|-----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>GCC Markets</b> |           | %     | %     | %     | %     | %     |               |      |       |
| Saudi (TASI)       | 13,814.85 | -0.04 | 0.59  | 0.59  | 5.53  | 22.45 | 12,683 SAR    | 2.43 | 21.07 |
| Qatar (QE Index)   | 13,512.87 | -0.31 | -0.57 | -0.57 | -0.15 | 16.23 | 685 QAR       | 1.62 | 15.51 |
| Dubai (DFMGI)      | 3,622.01  | -1.97 | -2.99 | -2.62 | 2.71  | 13.33 | 352 AED       | 1.80 | 24.85 |
| Abu Dhabi (ADI)    | 10,004.21 | -0.68 | -0.74 | -0.77 | 0.56  | 17.86 | 1,435 AED     | 1.96 | 19.87 |
| Bahrain (BAX)      | 2,027.92  | -0.73 | -1.28 | -1.37 | -2.20 | 12.83 | 21 BHD        | 1.22 | 17.24 |
| MUSCAT SE INDEX    | 4,174.30  | 0.49  | 0.38  | 0.38  | -0.73 | 1.08  | 5 OMR         | 0.96 | 13.25 |
| SP GCC Comp LMC    | 229.20    | -0.38 | -0.19 | -0.13 | 2.90  | 20.78 |               |      |       |

### Developed Markets

|                  |          |       |       |       |        |        |  |  |  |
|------------------|----------|-------|-------|-------|--------|--------|--|--|--|
| MSCI World Index | 2,671.83 | -3.27 | -4.03 | -4.43 | -12.49 | -17.33 |  |  |  |
| U.S. (S&P 500)   | 3,991.24 | -3.20 | -3.75 | -3.40 | -11.90 | -16.26 |  |  |  |
| U.K. (FTSE 100)  | 7,216.58 | -2.32 | -3.82 | -4.35 | -3.98  | -2.27  |  |  |  |
| Japan (Topix)    | 1,878.39 | -1.96 | -1.05 | -1.12 | -3.49  | -5.72  |  |  |  |

### Emerging Markets

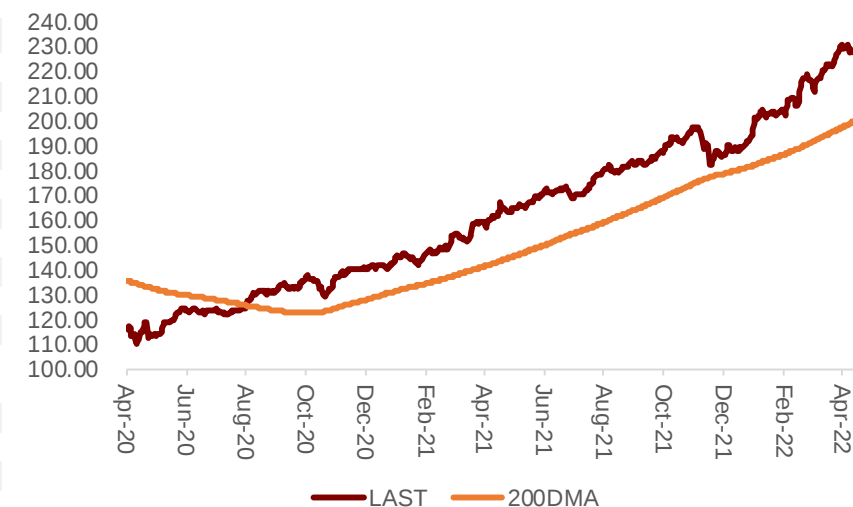
|                       |           |       |       |       |        |        |  |  |  |
|-----------------------|-----------|-------|-------|-------|--------|--------|--|--|--|
| MSCI EM Index         | 1,014.68  | -1.63 | -4.16 | -5.72 | -11.13 | -17.64 |  |  |  |
| China (SSE Composite) | 3,004.14  | 0.09  | -2.07 | -1.41 | -7.63  | -17.46 |  |  |  |
| India (Sensex)        | 54,470.67 | -0.67 | -2.21 | -4.54 | -7.00  | -6.49  |  |  |  |

| Description            | Close     | Day Δ | WTD   | MTD  | QTD  | YTD   | M Cap (in Bn) | PBV  | PE    |
|------------------------|-----------|-------|-------|------|------|-------|---------------|------|-------|
| <b>Kuwait</b>          |           | %     | %     | %    | %    | %     |               |      |       |
| Kuwait All Share Index | 8,387.78  | -0.24 | -0.85 | 0.35 | 2.96 | 19.09 | 49.99 KWD     | 2.70 | 28.23 |
| Kuwait Premier Index   | 9,334.62  | -0.33 | -0.93 | 0.29 | 3.02 | 22.20 | 38.49 KWD     | 2.93 | 30.03 |
| Kuwait Main Index      | 6,427.26  | 0.11  | -0.57 | 0.59 | 2.76 | 9.19  | 11.49 KWD     | 1.92 | 22.26 |
| NIC 50                 | 10,418.19 | -0.72 | -0.94 | 0.28 | 3.01 | 22.24 | 28.60 KWD     | 2.91 | 29.03 |

### Kuwait Sector

|                    |          |       |       |       |       |        |           |      |       |
|--------------------|----------|-------|-------|-------|-------|--------|-----------|------|-------|
| Banking            | 1,974.30 | -0.36 | -0.80 | 0.83  | 2.29  | 21.66  | 29.49 KWD | 1.55 | 31.03 |
| Telecom            | 1,378.72 | -0.35 | -2.63 | -2.41 | 9.23  | 26.56  | 4.23 KWD  | 0.99 | 18.16 |
| Industrials        | 1,422.52 | -0.28 | -1.22 | -0.35 | 9.85  | 24.62  | 5.05 KWD  | 1.00 | 25.69 |
| Financial services | 1,659.17 | 0.22  | -0.45 | 0.16  | -0.10 | 16.57  | 4.29 KWD  | 0.92 | 19.72 |
| Real estate        | 1,374.86 | 0.09  | -0.29 | 0.32  | -1.46 | 3.65   | 2.97 KWD  | 0.78 | 46.51 |
| Basic materials    | 1,212.21 | 0.99  | 3.42  | 4.55  | 4.34  | 18.29  | 1.08 KWD  | 1.82 | 20.04 |
| Health care        | 488.67   | 0.00  | -1.16 | 1.38  | -1.28 | -38.69 | 0.24 KWD  | 2.98 | 15.25 |
| Consumer services  | 710.29   | 0.05  | -0.23 | 0.05  | -0.21 | -2.85  | 0.82 KWD  | 0.92 | 15.72 |
| Insurance          | 1,533.87 | 0.00  | -0.46 | -0.48 | -5.39 | 0.03   | 0.64 KWD  | 0.74 | 9.43  |
| Consumer Disc      | 1,593.24 | -0.80 | -1.55 | -1.37 | 3.26  | 19.20  | 0.22 KWD  | 1.30 | 10.63 |
| Energy             | 1,267.57 | -0.10 | -0.19 | 1.47  | -2.40 | -11.24 | 0.26 KWD  | 0.87 | 16.79 |
| Technology         | 669.30   | 0.00  | 0.00  | 0.00  | -1.08 | -2.13  | 0.01 KWD  | 0.80 | 0.00  |
| Utilities          | 581.58   | 0.00  | -0.45 | -0.45 | -0.90 | -3.07  | 0.24 KWD  | 4.16 | 17.97 |

S&P GCC Composite LargeMidCap Index



### What Move the GCC markets

#### Oil Prices

Oil prices tumbled more than 1%, extending the previous day's steep declines as coronavirus lockdowns in top oil importer China, a strong dollar and growing recession risks fed worries about the outlook for global demand.

#### Kuwait Market

The market closed today down by – 0.24%, closed at 8,387.78 value traded 61.9 million KD, Premier market value traded reached 45.3 million KD and closed at 9,334.62 down by -0.33%.

#### Saudi Market

The Market closed down today by -0.04%, while the YTD performance is more than 20% and QTD in green zone indication the positive sentiment .

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



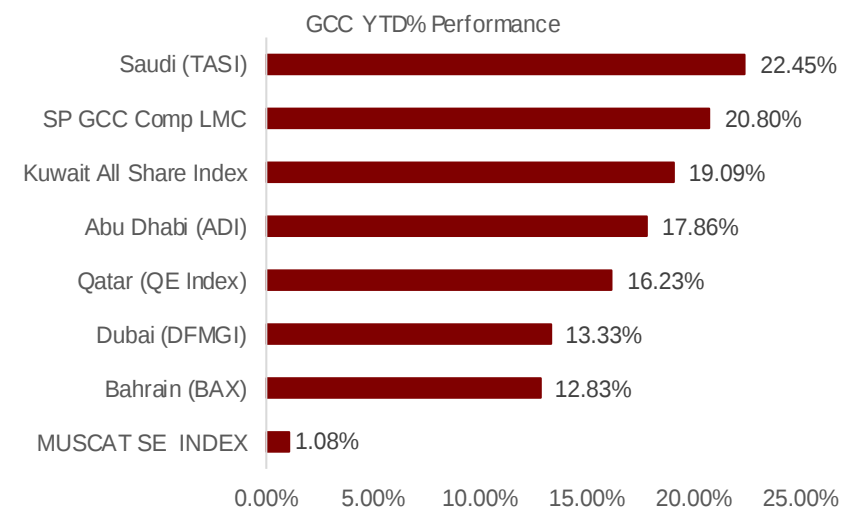
| Description                 | Close  | Day Δ | WTD   | MTD   | QTD    | YTD   | M Cap (in Bn) | PBV  | PE    |
|-----------------------------|--------|-------|-------|-------|--------|-------|---------------|------|-------|
| <b>Blue Chip Watch</b>      |        | %     | %     | %     | %      | %     |               |      |       |
| <b>Kuwait</b>               |        |       |       |       |        |       |               |      |       |
| NBK                         | 1.068  | 0.09  | -0.65 | 1.52  | -2.82  | 12.48 | 8.06 KWD      | 2.11 | 27.00 |
| KFH                         | 0.985  | -0.51 | -1.01 | 0.00  | 1.17   | 30.23 | 9.14 KWD      | 4.80 | 32.00 |
| Zain                        | 0.663  | -0.15 | -2.79 | -2.64 | 5.57   | 11.43 | 2.87 KWD      | 2.53 | 15.23 |
| BOUBYAN BANK                | 0.915  | -2.68 | -3.07 | -1.49 | 8.06   | 28.45 | 3.42 KWD      | 4.53 | 34.00 |
| Agility                     | 1.245  | -0.48 | -1.19 | -0.40 | 12.67  | 31.75 | 2.78 KWD      | 1.30 | 2.68  |
| <b>Saudi Arabia</b>         |        |       |       |       |        |       |               |      |       |
| ARAMCO                      | 45.95  | 0.22  | 2.34  | 2.34  | 6.61   | 28.35 | 9,190.49 SAR  | 8.25 | 23.19 |
| SABIC                       | 126.80 | -0.94 | -3.21 | -3.21 | -3.21  | 9.31  | 380.42 SAR    | 2.11 | 35.00 |
| STC                         | 119.20 | 3.11  | 2.76  | 2.76  | 10.58  | 6.05  | 238.41 SAR    | 3.44 | 20.27 |
| AL-RAJHI BANK               | 112.60 | 0.20  | 2.02  | 2.02  | 12.18  | 27.05 | 450.42 SAR    | 6.69 | 46.29 |
| NCB                         | 79.30  | -2.10 | 0.38  | 0.38  | 11.85  | 23.14 | 355.12 SAR    | 2.17 | 24.23 |
| <b>United Arab Emirates</b> |        |       |       |       |        |       |               |      |       |
| ETISALAT.AD                 | 33.98  | -0.88 | -1.51 | -2.91 | -8.06  | 7.19  | 295.52 AED    | 6.04 | 31.43 |
| FAB.AD                      | 21.80  | -2.24 | -2.24 | -2.85 | -7.63  | 17.06 | 240.84 AED    | 2.17 | 16.24 |
| EMIRATES NBD                | 14.70  | -2.33 | -3.61 | -3.61 | -2.00  | 8.49  | 92.85 AED     | 1.14 | 10.13 |
| DB ISLAMIC BK               | 6.37   | -1.24 | -2.00 | -1.24 | 3.24   | 18.40 | 46.12 AED     | 1.20 | 10.41 |
| EMAAR PROPERT               | 6.15   | -2.69 | -3.91 | -3.61 | 2.50   | 25.77 | 50.31 AED     | 0.82 | 11.82 |
| <b>Qatar</b>                |        |       |       |       |        |       |               |      |       |
| QNB                         | 23.09  | 0.39  | -0.69 | -0.69 | 0.09   | 14.36 | 212.94 QAR    | 2.20 | 17.04 |
| INDUSTRIES QAT              | 17.89  | -2.08 | -4.89 | -4.89 | -5.84  | 15.49 | 108.07 QAR    | 2.99 | 11.60 |
| QA ISLAMIC BK               | 24.57  | 0.08  | 0.33  | 0.33  | 3.06   | 34.04 | 57.97 QAR     | 2.39 | 16.76 |
| MASRAF AL RAYA              | 5.60   | 0.90  | 3.90  | 3.90  | 8.32   | 20.69 | 52.00 QAR     | 1.68 | 25.48 |
| MESAIEED PETRO              | 2.56   | -0.04 | -1.16 | -1.16 | -12.03 | 22.49 | 32.11 QAR     | 1.99 | 16.70 |
| <b>OMAN</b>                 |        |       |       |       |        |       |               |      |       |
| BANK MUSCAT                 | 0.528  | -0.38 | 0.38  | 0.38  | 3.53   | 14.55 | 1.98 OMR      | 0.95 | 8.33  |
| OMANTEL                     | 0.860  | -3.15 | 0.00  | 0.00  | -1.83  | 14.36 | 0.64 OMR      | 1.15 | 7.69  |
| BANK DHOFAR                 | 0.118  | 0.00  | 0.00  | 0.00  | 2.61   | -6.35 | 0.35 QAR      | 0.50 | 14.93 |
| NAT BANK OF OMAN            | 0.199  | -0.50 | -0.50 | -0.50 | -2.93  | 1.02  | 0.33 QAR      | 0.58 | 12.71 |
| OMINVEST                    | 0.320  | 3.23  | 1.91  | 1.91  | -5.33  | 4.58  | 0.21 QAR      | 0.73 | 6.85  |

| Foreign Holding |        |        |       |       |         |       |       |        |       |       |
|-----------------|--------|--------|-------|-------|---------|-------|-------|--------|-------|-------|
| Date            | NBK    | GBK    | CBK   | ABK   | MUTAHED | KIB   | BURG  | KFH    | BOUB  | WARBA |
| 20-Apr-22       | 22.19% | 12.97% | 0.06% | 0.50% | 0.39%   | 6.94% | 2.47% | 10.90% | 5.51% | 3.96% |
| 27-Apr-22       | 22.25% | 13.09% | 0.06% | 0.50% | 0.40%   | 6.92% | 2.50% | 10.97% | 5.52% | 3.96% |

### End of Report

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### Leading Sector, Security Performance

#### Kuwait

The market is down today by -0.24 %The leading sector worst performance indices today are Consumer Disc - 0.8 % , Banking – 0.36 % Telecom -0.35 % respectively.

#### KSA

Saudi Armco has a positive performance today by + 0.22 % , SABIC have negative performance today by -0.94 %

STC has a positive performance today by + 3.11 % , Al Rajhi Bank has a positive performance today by + 0.2 %

#### UAE

ETISALAT .AD have negative performance today by -0.88 % , FAB.AD have negative performance today by -2.24 %



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