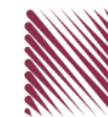


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, February 2, 2022





Market Watch

Wednesday, February 2, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,192.61	-0.82	0.11	-0.65	8.07	8.07	10,435 SAR	2.61	19.16
Qatar (QE Index)	12,610.29	0.30	0.81	0.90	8.47	8.47	641 QAR	1.81	16.85
Dubai (DFMGI)	3,174.33	0.12	-1.43	-0.90	-0.68	-0.68	314 AED	1.60	18.05
Abu Dhabi (ADI)	8,734.93	0.20	-0.36	0.35	2.90	2.90	1,435 AED	1.80	20.53
Bahrain (BAX)	1,818.75	0.20	0.62	0.49	1.20	1.20	18 BHD	1.56	9.94
MUSCAT SE INDEX	4,124.44	0.33	-1.11	0.20	-0.12	-0.12	5 OMR	0.87	13.25
SP GCC Comp LMC	203.84	0.00	0.38	0.13	7.42	7.42			

Developed Markets

MSCI World Index	3,086.62	0.90	2.69	0.90	-4.49	-4.49			
U.S. (S&P 500)	4,546.54	0.33	2.59	0.69	-4.61	-4.61			
U.K. (FTSE 100)	7,588.97	0.71	1.65	1.67	2.77	2.77			
Japan (Topix)	1,936.56	2.14	3.18	2.14	-2.80	-2.80			

Emerging Markets

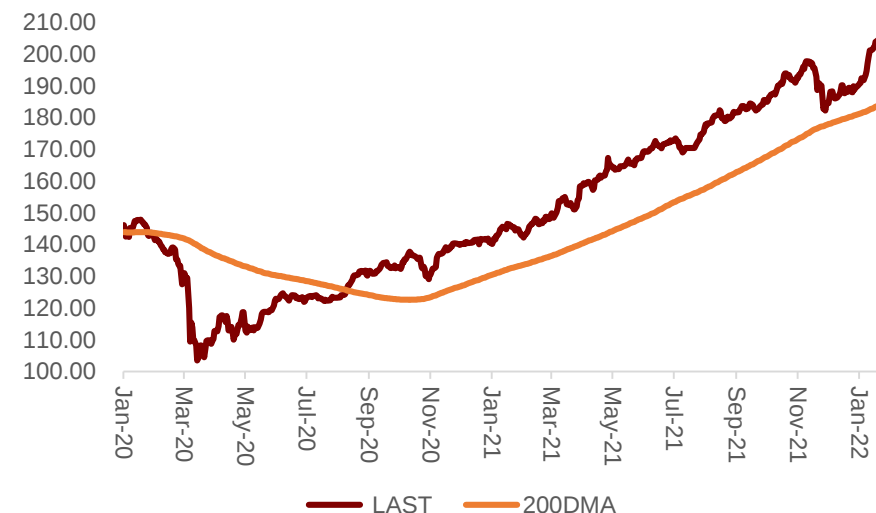
MSCI EM Index	1,214.01	0.48	1.92	0.48	-1.46	-1.46			
China (SSE Composite)	3,361.44	-0.97	-4.57	-7.65	-7.65	-7.65			
India (Sensex)	59,558.33	1.18	4.12	2.66	2.24	2.24			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,379.50	-0.01	0.72	0.40	4.78	4.78	43.79 KWD	2.21	26.94
Kuwait Premier Index	8,030.30	-0.04	0.49	0.22	5.12	5.12	32.85 KWD	2.34	26.88
Kuwait Main Index	6,105.74	0.07	1.49	1.01	3.79	3.79	10.94 KWD	1.79	27.22
NIC 50	8,936.56	-0.02	0.56	0.28	4.86	4.86	28.60 KWD	2.32	25.88

Kuwait Sector

Banking	1,712.07	0.08	0.63	0.55	5.50	5.50	25.43 KWD	1.40	27.88
Telecom	1,098.81	-0.16	0.36	0.06	0.87	0.87	3.37 KWD	0.92	15.46
Industrials	1,195.34	-0.02	2.45	0.75	4.72	4.72	4.24 KWD	0.98	14.63
Financial services	1,515.63	-0.10	0.73	-0.19	6.49	6.49	3.92 KWD	0.87	13.23
Real estate	1,352.20	0.04	-0.14	0.16	1.94	1.94	2.92 KWD	0.74	47.58
Basic materials	1,111.73	-0.02	0.00	-0.01	8.48	8.48	0.99 KWD	1.87	29.82
Health care	806.09	-0.10	-0.10	-0.10	1.14	1.14	0.40 KWD	6.16	12.68
Consumer services	727.50	-0.01	-0.11	0.47	-0.49	-0.49	0.75 KWD	0.90	15.65
Insurance	1,506.13	-0.98	-0.05	-1.44	-1.78	-1.78	0.63 KWD	0.78	8.49
Consumer Disc	1,467.94	-1.06	2.10	2.33	9.82	9.82	0.22 KWD	1.31	8.96
Energy	1,424.91	-0.56	-0.53	-1.31	-0.23	-0.23	0.30 KWD	1.04	15.71
Technology	721.68	-0.20	7.94	-4.62	5.53	5.53	0.01 KWD	0.85	0.00
Utilities	586.84	0.00	0.00	-0.45	-2.19	-2.19	0.25 KWD	3.95	18.95

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices rose on Wednesday towards last week's seven-year highs after data showing a fall in U.S. crude stocks underlined solid demand, but investors remained cautious ahead of an OPEC+ meeting due later in the day, Brent crude climbed 36 cents, or 0.4%, to \$89.52 a barrel.

Kuwait Market

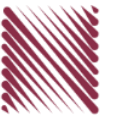
The market closed today down by - 0.01%, closed at 7,379.50 value traded 64.7 million KD, Premier market value traded reached 30.8 million KD and closed at 8,030.30 down by - 0.04%.

Saudi Market

The Market closed up today by - 0.82%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



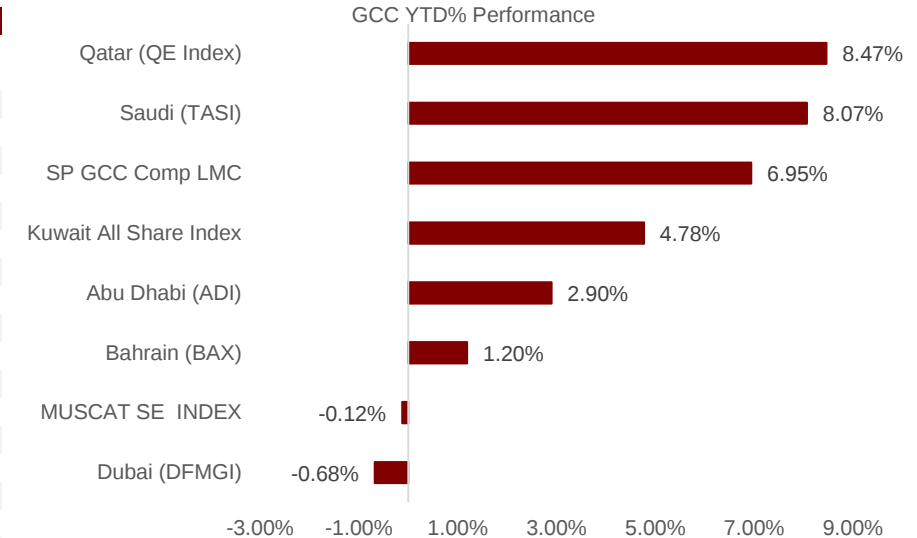
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.041	-0.19	-0.19	0.48	4.41	4.41	7.49 KWD	1.88	27.00
KFH	0.909	0.11	0.44	0.33	9.25	9.25	7.67 KWD	3.53	32.00
Zain	0.598	0.00	0.34	-0.17	0.50	0.50	2.59 KWD	2.18	13.69
BOUBYAN BANK	0.809	0.37	0.50	0.37	2.41	2.41	2.57 KWD	3.60	34.00
Agility	0.998	-0.40	1.01	-0.60	5.61	5.61	2.23 KWD	1.02	2.13
Saudi Arabia									
ARAMCO	36.75	-1.34	-0.41	-1.61	2.65	2.65	7,350.00 SAR	6.88	22.60
SABIC	123.40	-0.48	0.00	-0.96	6.38	6.38	370.20 SAR	2.13	35.00
STC	115.80	-1.19	-1.53	-1.36	3.02	3.02	231.60 SAR	3.38	20.79
AL-RAJHI BANK	147.80	0.00	0.00	-0.27	4.23	4.23	369.50 SAR	5.81	26.74
NCB	72.90	-2.67	-0.14	-1.22	13.20	13.20	326.45 SAR	2.02	21.41
United Arab Emirates									
ETISALAT.AD	33.06	0.24	-0.06	-0.12	4.29	4.29	287.51 AED	6.24	31.08
FAB.AD	19.94	-0.10	-3.02	-0.30	5.84	5.84	217.74 AED	1.93	17.89
EMIRATES NBD	13.15	0.00	-5.05	-1.50	-2.95	-2.95	83.06 AED	0.99	9.53
DB ISLAMIC BK	5.52	0.36	0.18	0.36	2.60	2.60	39.97 AED	1.03	10.43
EMAAR PROPERT	4.78	0.00	-2.45	-1.65	-2.25	-2.25	39.10 AED	0.60	12.41
Qatar									
QNB	21.80	0.23	-0.37	-0.18	7.97	7.97	201.35 QAR	2.04	16.45
INDUSTRIES QAT	16.83	-0.12	0.30	0.00	8.65	8.65	101.82 QAR	2.72	15.30
QA ISLAMIC BK	19.70	0.46	0.51	0.51	7.47	7.47	46.55 QAR	1.88	13.80
MASRAF AL RAYA	5.02	1.21	-0.22	2.10	8.15	8.15	46.64 QAR	1.91	21.64
MESAIEED PETRO	2.53	2.05	5.54	4.02	21.20	21.20	31.82 QAR	1.91	19.02
OMAN									
BANK MUSCAT	0.526	-0.38	0.38	1.54	9.09	9.09	1.89 OMR	0.88	8.33
OMANTEL	0.792	0.51	0.00	0.51	5.32	5.32	0.59 OMR	1.06	7.69
BANK DHOFAR	0.119	0.00	-2.46	0.00	-5.56	-5.56	0.36 QAR	0.50	14.93
NAT BANK OF OMAN	0.190	0.53	-5.00	0.53	-3.55	-3.55	0.31 QAR	0.56	12.71
OMINVEST	0.306	-2.55	0.64	3.29	2.61	2.61	0.25 QAR	0.92	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
19-Jan-22	20.95%	12.50%	0.06%	0.46%	0.39%	5.15%	2.63%	10.41%	5.26%	4.34%
26-Jan-22	20.98%	12.42%	0.06%	0.46%	0.39%	5.26%	2.66%	10.40%	5.30%	4.28%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.01 %The leading sector bottom performance indices today are Consumer Disc -1.06 % Insurance -0.98 % Energy -0.56 % respectively

Telecommunication sector are down today by -0.16 % and act defensively in COVID19 also it underperform Kuwait all Share Index in YTD perspective by-3.91 %

KSA

Saudi Armco have negative performance today by -1.34 %, SABIC have negative performance today by -0.48 %

STC have negative performance today by -1.19 %, Al Rajhi Bank flat performance today

UAE

ETISALAT AD closed up today by + 0.24 %, and act defensively with COVID19



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