

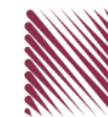


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, February 3, 2022





Market Watch

Thursday, February 3, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	12,142.380	-0.41	-0.30	-1.05	7.63	7.63	10,435 SAR	2.61	19.16
Qatar (QE Index)	12,654.780	0.35	1.17	1.25	8.85	8.85	641 QAR	1.81	16.85
Dubai (DFMGI)	3,152.800	-0.68	-2.10	-1.57	-1.35	-1.35	314 AED	1.60	18.05
Abu Dhabi (ADI)	8,728.020	-0.08	-0.43	0.27	2.82	2.82	1,435 AED	1.80	20.53
Bahrain (BAX)	1,824.247	0.30	2.36	0.80	1.50	1.50	18 BHD	1.56	9.94
MUSCAT SE INDEX	4,127.524	0.07	-1.04	0.28	-0.05	-0.05	5 OMR	0.87	13.25
SP GCC Comp LMC	202.347	-0.28	-0.26	-0.60	6.65	6.65			

Developed Markets

MSCI World Index	3,052.50	-1.97	3.29	-0.21	-5.70	-5.70			
U.S. (S&P 500)	4,477.44	-2.44	3.49	-0.84	-6.30	-6.30			
U.K. (FTSE 100)	7,528.84	-0.71	-0.34	0.86	1.70	1.70			
Japan (Topix)	1,919.92	-0.86	4.21	1.27	-3.63	-3.63			

Emerging Markets

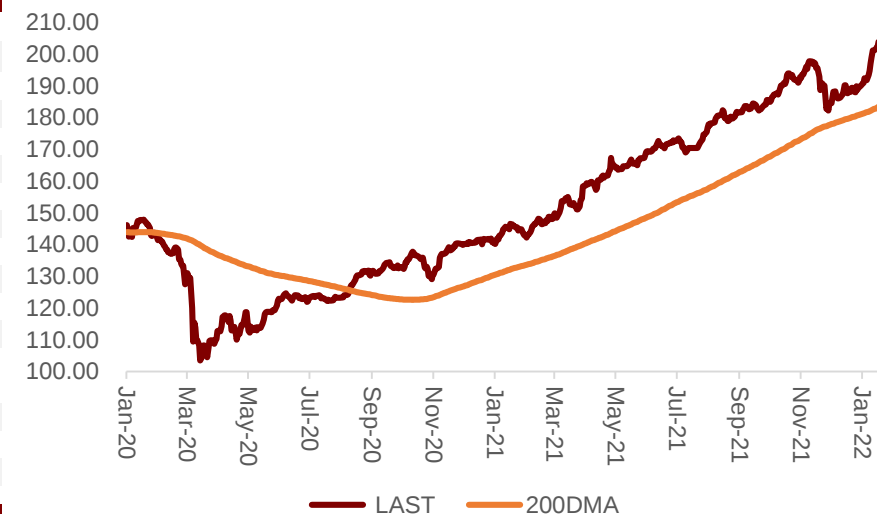
MSCI EM Index	1,210.27	-0.24	1.53	0.17	-1.02	-1.02			
China (SSE Composite)	3,361.44	-0.97	-4.57	-7.65	-7.65	-7.65			
India (Sensex)	58,788.02	-1.29	2.64	1.33	1.72	1.72			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,400.40	0.28	1.00	0.68	5.07	5.07	43.79 KWD	2.21	26.94
Kuwait Premier Index	8,036.67	0.08	0.57	0.30	5.20	5.20	32.85 KWD	2.34	26.88
Kuwait Main Index	6,161.28	0.91	2.35	1.87	4.67	4.67	10.94 KWD	1.79	27.22
NIC 50	8,939.20	0.03	0.59	0.31	4.89	4.89	28.60 KWD	2.32	25.88

Kuwait Sector

Banking	1,712.04	0.00	0.63	0.55	5.50	5.50	25.43 KWD	1.40	27.88
Telecom	1,151.64	4.81	5.19	4.87	5.72	5.72	3.37 KWD	0.92	15.46
Industrials	1,194.12	-0.10	2.34	0.65	4.61	4.61	4.24 KWD	0.98	14.63
Financial services	1,506.28	-0.62	0.11	-0.80	5.83	5.83	3.92 KWD	0.87	13.23
Real estate	1,348.45	-0.28	-0.42	-0.12	1.66	1.66	2.92 KWD	0.74	47.58
Basic materials	1,104.23	-0.67	-0.68	-0.68	7.75	7.75	0.99 KWD	1.87	29.82
Health care	806.09	0.00	-0.10	-0.10	1.14	1.14	0.40 KWD	6.16	12.68
Consumer services	731.60	0.56	0.46	1.03	0.07	0.07	0.75 KWD	0.90	15.65
Insurance	1,509.02	0.19	0.14	-1.25	-1.59	-1.59	0.63 KWD	0.78	8.49
Consumer Disc	1,482.82	1.01	3.13	3.37	10.94	10.94	0.22 KWD	1.31	8.96
Energy	1,406.31	-1.31	-1.83	-2.60	-1.53	-1.53	0.30 KWD	1.04	15.71
Technology	742.05	2.82	10.99	-1.92	8.51	8.51	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 eased on Thursday following weak U.S. payrolls data and some profit taking, but remained underpinned by tight supply as OPEC+ producers stuck to planned moderate output increases, Brent crude fell 17 cents, or 0.2%, to \$89.30 a barrel.

Kuwait Market

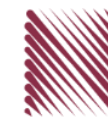
The market closed today up by + 0.28%, closed at 7,400.40 value traded 71.0 million KD, Premier market value traded reached 29.2 million KD and closed at 8,036.67 up by + 0.08%.

Saudi Market

The Market closed down today by - 0.41%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



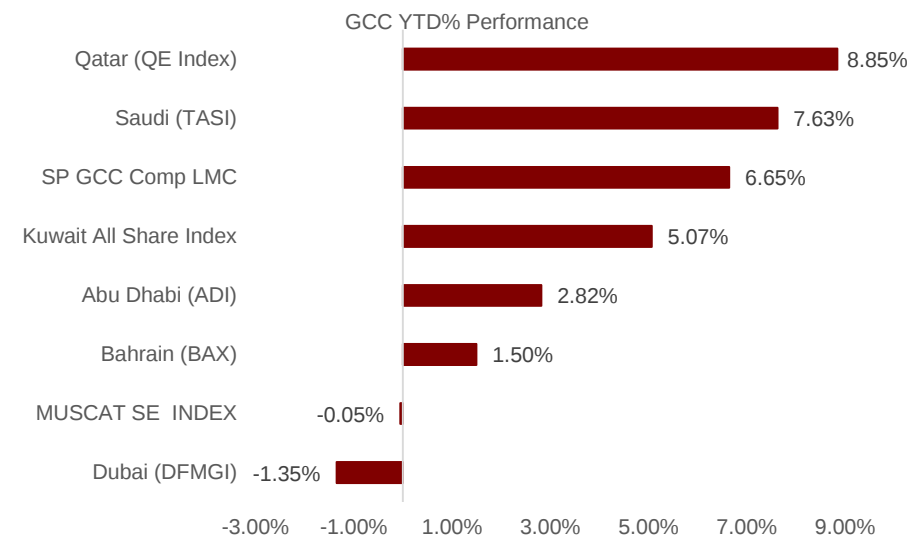
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.040	-0.10	-0.29	0.39	4.31	4.31	7.49 KWD	1.88	27.00
KFH	0.908	-0.11	0.22	0.11	9.01	9.01	7.67 KWD	3.53	32.00
Zain	0.601	0.50	0.84	0.33	1.01	1.01	2.59 KWD	2.18	13.69
BOUBYAN BANK	0.807	-0.25	0.25	0.12	2.15	2.15	2.57 KWD	3.60	34.00
Agility	1.000	0.20	1.32	-0.30	5.93	5.93	2.23 KWD	1.02	2.13
Saudi Arabia									
ARAMCO	36.90	0.41	0.14	3.07	3.07	3.07	7,350.00 SAR	6.88	22.60
SABIC	121.40	-1.62	-3.96	4.66	4.66	4.66	370.20 SAR	2.13	35.00
STC	116.60	0.69	-4.43	3.74	3.74	3.74	231.60 SAR	3.38	20.79
AL-RAJHI BANK	148.00	0.14	-1.60	4.37	4.37	4.37	369.50 SAR	5.81	26.74
NCB	71.80	-1.51	-2.97	11.49	11.49	11.49	326.45 SAR	2.02	21.41
United Arab Emirates									
ETISALAT.AD	33.00	-0.18	-0.24	-0.30	4.10	4.10	287.51 AED	6.24	31.08
FAB.AD	19.96	0.10	-2.92	-0.20	5.94	5.94	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	5.50	-0.36	-0.18	0.00	2.23	2.23	39.97 AED	1.03	10.43
EMAAR PROPERT	4.72	-1.26	-3.67	-2.88	-3.48	-3.48	39.10 AED	0.60	12.41
Qatar									
QNB	21.80	0.00	-0.37	-0.18	7.97	7.97	201.35 QAR	2.04	16.45
INDUSTRIES QAT	16.77	-0.36	-0.12	-0.42	8.20	8.20	101.82 QAR	2.72	15.30
QA ISLAMIC BK	20.16	2.34	2.86	2.86	9.98	9.98	46.55 QAR	1.88	13.80
MASRAF AL RAYA	5.02	0.02	-0.18	2.14	8.19	8.19	46.64 QAR	1.91	21.64
MESAIEED PETRO	2.54	0.08	5.63	4.11	21.29	21.29	31.82 QAR	1.91	19.02
OMAN									
BANK MUSCAT	0.526	-0.38	0.00	1.15	8.68	8.68	1.89 OMR	0.88	8.33
OMANTEL	0.808	2.02	2.02	2.54	7.45	7.45	0.59 OMR	1.06	7.69
BANK DHOFAR	0.120	0.84	-1.64	0.84	-4.76	-4.76	0.36 QAR	0.50	14.93
NAT BANK OF OMAN	0.188	-1.05	-6.00	-0.53	-4.57	-4.57	0.31 QAR	0.56	12.71
OMINVEST	0.314	0.00	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
26-Jan-22	20.98%	12.42%	0.06%	0.46%	0.39%	5.26%	2.66%	10.40%	5.30%	4.28%
2-Feb-22	20.96%	12.30%	0.06%	0.46%	0.40%	5.27%	2.52%	10.36%	5.29%	4.26%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.28 %The leading sector best performance indices today are Telecom 4.81 % Technology 2.82 % Consumer Disc 1.01 % respectively

Telecommunication sector are up today by + 4.81 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 0.67 %

KSA

Saudi Armco has a positive performance today by + 0.41 %, SABIC have negative performance today by -1.62 %

STC has a positive performance today by + 0.69 %, Al Rajhi Bank has a positive performance today by + 0.14 %

UAE

ETISALAT AD closed down today by - 0.18 %, and act defensively with COVID19



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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