



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, January 31, 2022



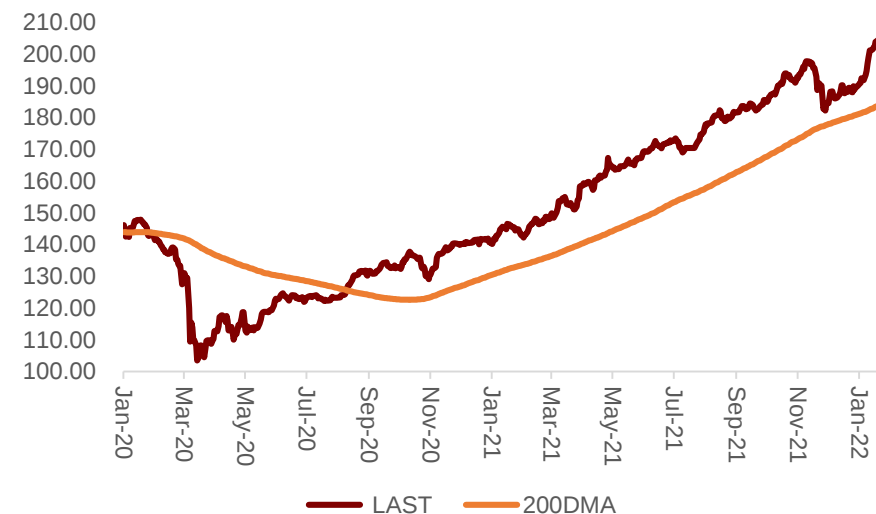


Market Watch

Monday, January 31, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	12,271.840	0.10	0.76	8.78	8.78	8.78	10,577 SAR	2.63	19.22
Qatar (QE Index)	12,498.200	0.03	-0.08	7.50	7.50	7.50	635 QAR	1.77	16.72
Dubai (DFMGI)	3,203.080	-0.54	0.46	0.22	0.22	0.22	317 AED	1.61	22.57
Abu Dhabi (ADI)	8,704.260	-0.71	-0.34	2.54	2.54	2.54	1,435 AED	1.80	20.57
Bahrain (BAX)	1,809.816	0.16	1.55	0.70	0.70	0.70	18 BHD	1.58	9.94
MUSCAT SE INDEX	4,116.004	-0.86	-1.31	-0.33	-0.33	-0.33	5 OMR	0.87	13.25
SP GCC Comp LMC	203.567	0.34	-0.29	7.29	7.29	7.29			
Developed Markets									
MSCI World Index	3,059.050	1.78	3.51	-5.50	-5.50	-5.50			
U.S. (S&P 500)	4,515.550	1.89	4.37	-5.51	-5.51	-5.51			
U.K. (FTSE 100)	7,464.370	-0.02	-1.19	0.83	0.83	0.83			
Japan (Topix)	1,895.930	1.01	2.90	-4.84	-4.84	-4.84			
Emerging Markets									
MSCI EM Index	1,208.232	1.44	1.36	-1.19	-1.19	-1.19			
China (SSE Composite)	3,361.440	0.00	-0.97	-7.12	-7.12	-7.12			
India (Sensex)	58,014.170	1.42	1.29	0.38	0.38	0.38			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	7,350.37	0.17	0.32	4.36	4.36	4.36	43.57 KWD	2.19	27.12
Kuwait Premier Index	8,012.87	0.15	0.27	4.89	4.89	4.89	32.74 KWD	2.34	26.83
Kuwait Main Index	6,048.31	0.25	0.48	2.75	2.75	2.75	10.83 KWD	1.75	28.11
NIC 50	8,911.90	0.00	0.28	4.57	4.57	4.57	28.60 KWD	2.32	25.83
Kuwait Sector									
Banking	1,702.680	0.02	0.08	4.92	4.92	4.92	25.26 KWD	1.37	27.83
Telecom	1,098.130	0.66	0.30	0.80	0.80	0.80	3.36 KWD	0.93	15.20
Industrials	1,186.410	0.69	1.68	3.94	3.94	3.94	4.20 KWD	0.96	14.40
Financial services	1,518.470	0.40	0.92	6.69	6.69	6.69	3.92 KWD	0.87	13.27
Real estate	1,350.030	-0.08	-0.30	1.78	1.78	1.78	2.91 KWD	0.73	47.60
Basic materials	1,111.810	-0.07	0.00	8.49	8.49	8.49	0.99 KWD	1.86	29.87
Health care	811.180	0.00	0.00	1.78	1.78	1.78	0.40 KWD	6.16	12.68
Consumer services	724.130	-0.05	-0.57	-0.95	-0.95	-0.95	0.74 KWD	0.89	15.58
Insurance	1,528.140	0.94	1.41	-0.34	-0.34	-0.34	0.64 KWD	0.80	8.49
Consumer Disc	1,434.480	-0.11	-0.23	7.32	7.32	7.32	0.22 KWD	1.32	8.90
Energy	1,443.790	0.41	0.79	1.10	1.10	1.10	0.30 KWD	1.04	15.82
Technology	756.600	0.00	13.17	10.64	10.64	10.64	0.01 KWD	0.90	0.00
Utilities	589.470	0.45	0.45	-1.76	-1.76	-1.76	0.25 KWD	3.97	19.03

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil rose on Monday as a supply shortage and political tensions in Eastern Europe and the Middle East put prices on track for their biggest monthly gain in almost a year. Brent crude finished the day at \$91.21 for a gain of 1.31%.

Kuwait Market

The market closed today up by + 0.17%, closed at 7,350.37 value traded 55.8 million KD, Premier market value traded reached 31.8 million KD and closed at 8,012.87 up by + 0.15%.

Saudi Market

The Market closed up today by + 0.10%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



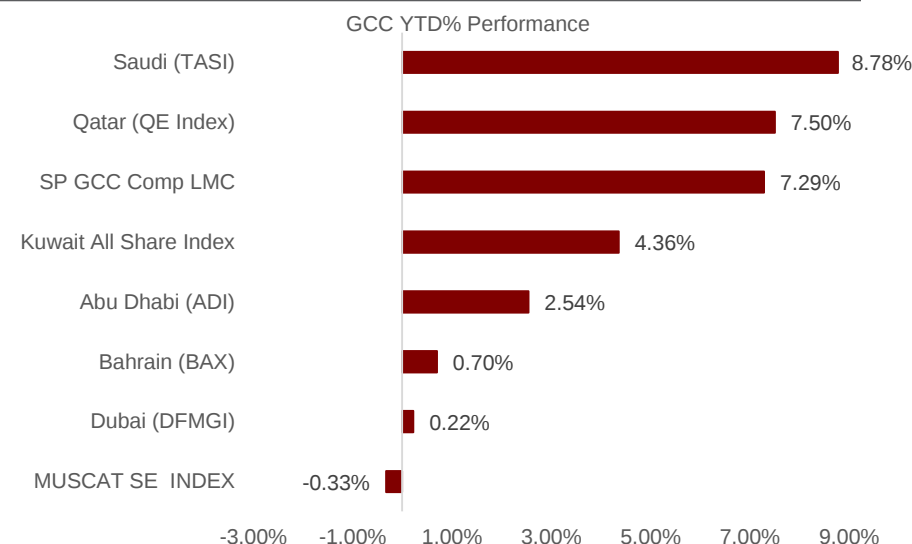
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.036	-0.10	-0.67	3.91	3.91	3.91	7.44 KWD	1.87	27.00
KFH	0.906	-0.33	0.11	8.89	8.89	8.89	7.64 KWD	3.52	32.00
Zain	0.599	0.84	0.50	0.67	0.67	0.67	2.59 KWD	2.18	13.72
BOUBYAN BANK	0.806	0.37	0.12	2.03	2.03	2.03	2.56 KWD	3.59	34.00
Agility	1.004	0.40	1.62	6.24	6.24	6.24	2.24 KWD	1.03	2.14
Saudi Arabia									
ARAMCO	37.35	0.54	1.22	4.33	4.33	4.33	7,470.00 SAR	6.99	22.47
SABIC	124.60	-0.48	0.97	7.41	7.41	7.41	373.80 SAR	2.15	35.00
STC	117.40	-1.01	-0.17	4.45	4.45	4.45	234.80 SAR	3.42	21.00
AL-RAJHI BANK	148.20	0.14	0.27	4.51	4.51	4.51	370.50 SAR	5.82	26.70
NCB	73.80	1.10	1.10	14.60	14.60	14.60	330.48 SAR	2.05	21.17
United Arab Emirates									
ETISALAT.AD	33.10	0.06	1.35	4.42	4.42	4.42	287.84 AED	6.25	31.19
FAB.AD	20.00	-2.72	-2.91	6.16	6.16	6.16	218.38 AED	1.93	17.93
EMIRATES NBD	13.35	-3.61	-2.55	-1.48	-1.48	-1.48	84.32 AED	1.01	9.68
DB ISLAMIC BK	5.50	-0.18	0.18	2.23	2.23	2.23	39.82 AED	1.02	10.43
EMAAR PROPERT	4.86	-0.82	1.25	-0.61	-0.61	-0.61	39.75 AED	0.61	12.61
Qatar									
QNB	21.840	-0.73	-0.18	8.17	8.17	8.17	201.28 QAR	2.04	16.52
INDUSTRIES QAT	16.830	0.18	0.30	8.65	8.65	8.65	101.60 QAR	2.72	15.28
QA ISLAMIC BK	19.600	0.00	0.00	6.93	6.93	6.93	46.21 QAR	1.87	13.79
MASRAF AL RAYA	4.915	-0.45	-2.27	5.93	5.93	5.93	45.61 QAR	1.87	21.46
MESAIEED PETRO	2.435	2.27	1.46	16.51	16.51	16.51	30.52 QAR	1.83	18.66
OMAN									
BANK MUSCAT	0.524	-0.38	-0.76	8.26	8.26	8.26	1.87 OMR	0.87	8.33
OMANTEL	0.800	0.00	1.01	6.38	6.38	6.38	0.60 OMR	1.07	7.69
BANK DHOFAR	0.119	-2.46	-2.46	-2.46	-2.46	-2.46	0.36 QAR	0.50	14.93
NAT BANK OF OMAN	0.189	0.00	-5.50	-3.57	-3.57	-3.57	0.31 QAR	0.56	12.71
OMINVEST	0.304	-4.40	-2.56	-0.65	-0.65	-0.65	0.25 QAR	0.89	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 up today by + 0.17 %The leading sector best performance indices today are Insurance 0.94 % Industrial 0.69 % Telecom 0.66 % respectively

Telecommunication sector is up today by + 0.66 % and act defensively in COVID19 also it overperform Kuwait all Share Index in YTD perspective by 0.80 %

KSA

Saudi Armco has a positive performance today by + 0.54 %, SABIC has a negative performance today by - 0.48 %

STC has a negative performance today by - 1.01 %, Al Rajhi Bank has a positive performance today by + 0.14 %

UAE

ETISALAT AD closed up today by + 0.06 %, and act defensively with COVID19



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