



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Sunday, September 11<sup>th</sup> 2022

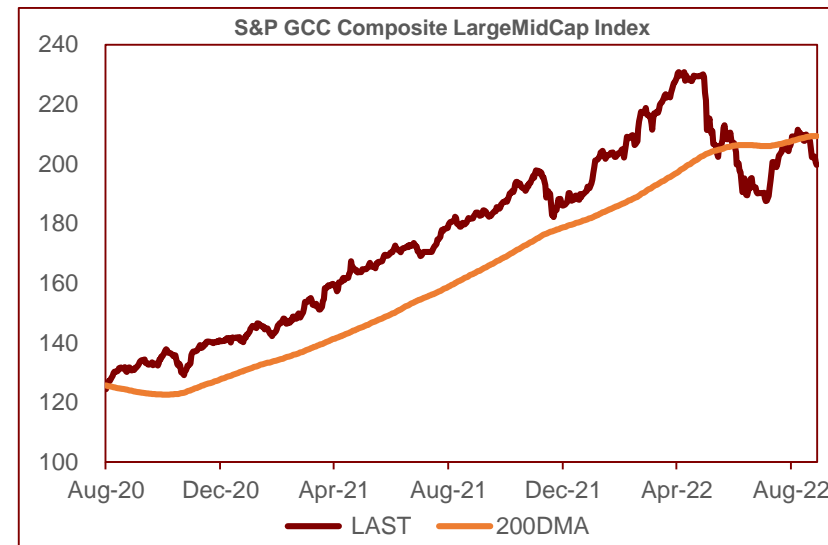




### Market Watch

Sunday, September 11, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>									
		%	%	%	%	%			
Saudi (TASI)	11,940.36	0.90	0.90	-2.79	3.62	5.84	11,241 SAR	2.06	17.74
Qatar (QE Index)	13,103.54	1.19	1.19	-2.40	7.48	12.71	656 QAR	1.54	14.99
Dubai (DFMGI)	3,360.83	0.04	0.04	-2.39	4.27	5.16	453 AED	1.42	13.81
Abu Dhabi (ADI)	9,795.86	0.10	0.10	-0.80	4.49	15.40	1,435 AED	2.10	26.95
Bahrain (BAX)	1,927.92	-0.01	-0.01	0.52	4.80	7.27	20 BHD	1.76	11.59
MUSCAT SE INDEX	4,519.71	0.15	0.15	-1.43	9.63	9.45	5 OMR	0.96	13.25
SP GCC Comp LMC	198.71	0.77	0.77	-3.11	3.23	4.73			
SP UAE PRICE INDEX	140.19	0.12	0.12	-3.99	-0.81	-4.93			
<b>Developed Markets</b>									
MSCI World Index	2,682.90	1.77	1.77	2.12	5.37	-16.98			
U.S. (S&P 500)	4,067.36	1.53	1.53	2.84	7.45	-14.66			
U.K. (FTSE 100)	7,351.07	1.23	1.23	0.92	2.54	-0.45			
Japan (Topix)	1,965.53	0.40	0.40	0.12	5.06	-1.35			
<b>Emerging Markets</b>									
MSCI EM Index	970.29	1.37	1.37	-2.40	-3.04	-21.24			
China (SSE Composite)	3,262.05	0.82	0.82	1.87	-4.02	-10.38			
India (Sensex)	59,793.14	0.18	0.18	0.43	12.78	2.64			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>									
		%	%	%	%	%			
Kuwait All Share Index	7,575.41	0.27	0.27	-1.73	2.25	7.56	45.12 KWD	2.33	22.04
Kuwait Premier Index	8,440.20	0.23	0.23	-1.80	2.39	10.49	34.74 KWD	2.48	23.40
Kuwait Main Index	5,780.23	0.40	0.40	-1.50	1.75	-1.80	10.38 KWD	1.80	17.46
NIC 50	9,515.55	0.19	0.22	-1.81	2.38	11.65	28.60 KWD	2.46	22.40
<b>Kuwait Sector</b>									
Banking	1,828.45	0.25	0.25	-1.74	2.67	12.67	27.27 KWD	1.34	24.40
Telecom	1,218.68	0.36	0.36	-2.50	0.73	11.87	3.74 KWD	1.02	12.97
Industrials	1,176.22	0.34	0.34	-3.07	1.05	3.04	4.15 KWD	0.87	12.23
Financial services	1,407.39	0.47	0.47	-1.37	2.60	-1.12	3.67 KWD	0.76	13.87
Real estate	1,267.16	0.33	0.33	-0.03	5.14	-4.47	2.73 KWD	0.68	28.33
Basic materials	998.37	-0.37	-0.37	-1.13	-1.43	-2.58	0.89 KWD	1.35	11.11
Health care	420.41	0.00	0.00	-2.80	-11.69	-47.25	0.21 KWD	2.28	10.26
Consumer services	522.59	0.59	0.59	-2.19	-0.91	-28.52	0.79 KWD	0.97	10.94
Insurance	1,579.67	-0.36	-0.36	0.29	2.41	3.02	0.66 KWD	0.82	8.02
Consumer Disc	1,517.89	0.28	0.28	-0.61	1.95	13.56	0.16 KWD	1.03	21.35
Energy	1,144.20	1.61	1.61	-4.64	-2.05	-19.88	0.24 KWD	0.85	12.23
Technology	608.19	-5.00	-5.00	0.12	-12.92	-11.06	0.01 KWD	0.74	0.00
Utilities	534.21	-0.98	-0.98	0.99	-1.93	-10.97	0.22 KWD	2.28	15.54



### What Move the GCC markets

#### Oil Prices

Oil prices rose over 3% on Friday supported by real and threatened cuts to supply, although futures were set for a second weekly decline as aggressive interest rate hikes and China's COVID-19 curbs weighed on the demand outlook. Russian President Vladimir Putin has threatened to halt oil and gas exports to Europe if price caps are imposed and a small cut to OPEC+ oil output plans announced this week also supported prices, Brent crude rose \$3.30, or 3.7%, to \$92.45 a barrel.

#### Kuwait Market

The market closed up today by up 0.27% at 7,575.41 value traded 29.2 million KD, Premier market value traded reached 17.7 million KD and closed at 8,440.20 up by + 0.23%.

#### Saudi Market

The Market closed up today by 0.90%, KSA Market closed up as oil prices are relatively stable listed companies start declaration their positive semiannual financial performance.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



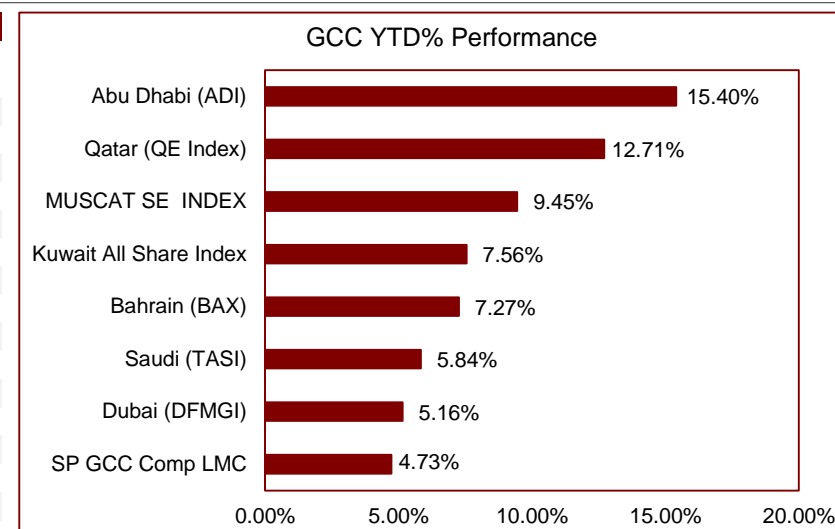
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	1.035	0.49	0.49	-1.80	-0.77	9.00	7.81 KWD	2.01	27.00
KFH	0.883	-0.11	-0.11	-1.89	1.38	16.74	8.19 KWD	3.78	32.00
Zain	0.592	0.68	0.68	-2.15	-0.34	-0.50	2.56 KWD	2.16	12.97
BOUBYAN BANK	0.812	0.50	0.50	-2.75	5.05	13.99	3.03 KWD	3.28	34.00
Agility	0.810	0.37	0.37	-3.80	-0.37	2.86	2.17 KWD	1.38	2.56
<b>Saudi Arabia</b>									
ARAMCO	37.10	1.50	1.50	-1.07	-4.38	13.99	8,162.00 SAR	6.27	15.21
SABIC	99.00	1.23	1.23	-1.20	-2.56	-14.66	297.00 SAR	1.64	35.00
STC	39.95	0.38	0.38	-4.43	2.86	-11.14	199.75 SAR	2.78	17.41
AL-RAJHI BANK	86.90	1.40	1.40	-3.66	5.33	-1.95	347.60 SAR	4.24	23.40
NCB	67.00	1.21	1.21	-4.15	1.67	4.04	300.03 SAR	1.85	16.81
<b>United Arab Emirates</b>									
ETISALAT.AD	23.58	0.94	0.94	-8.32	-9.66	-25.62	205.06 AED	4.35	21.90
FAB.AD	18.40	0.00	0.00	-3.66	-2.02	-1.19	203.26 AED	1.82	13.68
EMIRATES NBD	12.85	-0.77	-0.77	-3.75	-2.65	-5.17	81.16 AED	0.95	8.72
DB ISLAMIC BK	5.79	0.17	0.17	-1.03	0.52	7.62	41.92 AED	1.07	8.76
EMAAR PROPERT	6.06	0.66	0.66	-3.19	16.54	23.93	49.57 AED	0.78	6.71
<b>Qatar</b>									
QNB	19.70	1.03	1.03	-4.55	-1.40	-2.43	182.86 QAR	1.79	14.61
INDUSTRIES QAT	18.01	1.12	1.12	-0.77	12.92	16.27	109.50 QAR	2.80	10.91
QA ISLAMIC BK	25.06	2.29	2.29	-2.15	12.63	36.72	59.51 QAR	2.35	16.54
MASRAF AL RAYA	4.34	0.91	0.91	-3.94	5.16	-6.40	40.59 QAR	1.69	21.73
MESAIEED PETRO	2.49	2.39	2.39	-4.31	-0.08	19.04	31.41 QAR	1.87	15.71
<b>OMAN</b>									
BANK MUSCAT	0.590	-0.34	-0.34	-2.32	11.74	28.00	2.21 OMR	1.04	8.33
OMANTEL	0.924	4.05	-0.43	0.43	5.96	22.87	0.69 OMR	1.20	7.69
BANK DHOFAR	0.135	3.85	3.85	0.00	15.38	7.14	0.40 QAR	0.58	14.93
NAT BANK OF OMAN	0.260	0.00	0.00	-3.70	23.81	31.98	0.42 QAR	0.75	12.71
OMINVEST	0.330	0.00	0.00	-0.60	7.84	7.84	0.22 QAR	0.73	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
31-August 22	23.78%	16.45%	0.06%	1.23%	0.39%	5.85%	17.68%	11.36%	5.77%	4.01%
7-September 22	23.72%	16.43%	0.06%	1.24%	0.38%	5.83%	17.70%	11.37%	5.71%	4.04%

### End of Report

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### Leading Sector, Security Performance

#### Kuwait

The market is up today by + 0.27 % The leading sector best performance indices today are Energy 1.61 % Consumer services 0.59 % Financial services 0.47 % respectively

#### KSA

Saudi Armco has a positive performance today by + 1.5 %, SABIC has a positive performance today by + 1.23 %, STC has a positive performance today by + 0.38 %, Al Rajhi Bank has a positive performance today by + 1.4 %

#### UAE

ETISALAT .AD has a positive performance today by + 0.94 %, FAB.AD flat performance today



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