



شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

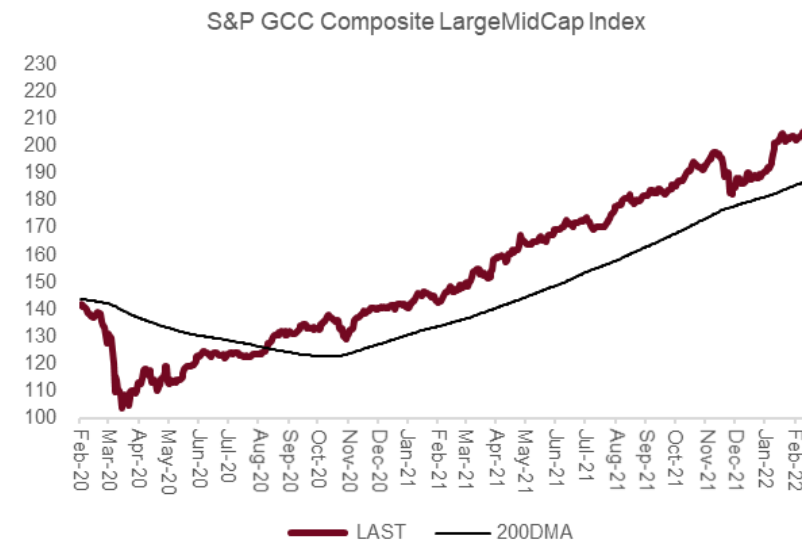
Monday, March 21, 2022





Market Watch Tuesday, March 22, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>									
		%	%	%	%	%			
Saudi (TASI)	12,831.69	-0.34	1.16	1.92	13.74	13.74	11,831 SAR	2.39	19.55
Qatar (QE Index)	13,383.44	0.40	-1.83	3.36	15.12	15.12	674 QAR	1.75	16.27
Dubai (DFMGI)	3,360.14	0.30	-1.24	0.16	5.14	5.14	332 AED	1.42	20.09
Abu Dhabi (ADI)	9,562.94	-0.45	-0.75	2.61	12.66	12.66	1,435 AED	1.82	21.59
Bahrain (BAX)	1,982.87	0.37	-3.44	0.98	10.33	10.33	20 BHD	1.19	17.57
MUSCAT SE INDEX	4,302.38	-0.29	-0.60	6.09	4.19	4.19	5 OMR	0.91	13.25
SP GCC Comp LMC	217.22	-0.21	0.36	2.65	14.48	14.47			
<b>Developed Markets</b>									
MSCI World Index	3,010.08	-0.02	5.99	1.08	-6.86	-6.86			
U.S. (S&P 500)	4,461.18	-0.04	6.11	1.99	-6.40	-6.40			
U.K. (FTSE 100)	7,442.39	0.51	4.01	-0.21	0.78	0.78			
Japan (Topix)	1,909.27	0.00	6.10	1.18	-4.17	-4.17			
<b>Emerging Markets</b>									
MSCI EM Index	1,115.26	-0.69	2.73	-4.78	-9.48	-9.48			
China (SSE Composite)	3,253.69	0.08	-1.69	-6.03	-10.61	-10.61			
India (Sensex)	57,292.49	-0.99	3.14	1.86	-1.65	-1.65			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>									
		%	%	%	%	%			
Kuwait All Share Index	7,866.31	0.01	-1.15	3.00	11.69	11.69	46.63 KWD	2.37	28.85
Kuwait Premier Index	8,683.96	-0.07	-0.83	4.37	13.68	13.68	35.57 KWD	2.58	30.04
Kuwait Main Index	6,199.93	0.29	-2.23	-1.45	5.33	5.33	11.06 KWD	1.67	25.08
NIC 50	9,567.39	-0.35	-0.84	4.36	13.67	12.26	28.60 KWD	2.56	29.04
<b>Kuwait Sector</b>									
Banking	1,842.07	-0.02	-0.77	4.87	13.51	13.51	27.39 KWD	1.35	31.04
Telecom	1,248.68	-0.01	-1.29	2.58	14.62	14.62	3.83 KWD	0.82	15.74
Industrials	1,253.60	0.03	-0.82	-1.05	9.82	9.82	4.44 KWD	0.96	11.39
Financial services	1,605.13	-0.01	-1.70	1.81	12.77	12.77	4.01 KWD	0.92	23.41
Real estate	1,382.52	-0.09	-0.55	2.61	4.23	4.23	2.98 KWD	0.73	52.53
Basic materials	1,150.57	0.36	-1.75	1.68	12.27	12.27	1.03 KWD	1.89	29.55
Health care	515.27	0.00	-35.01	-36.60	-35.35	-35.35	0.26 KWD	3.23	13.17
Consumer services	716.17	-0.67	-1.19	-0.81	-2.04	-2.04	0.78 KWD	0.93	16.88
Insurance	1,640.63	0.64	-0.15	1.65	6.99	6.99	0.69 KWD	0.80	8.69
Consumer Disc	1,528.56	0.56	1.58	-1.00	14.36	14.36	0.22 KWD	1.31	8.85
Energy	1,380.93	0.10	0.05	0.67	-3.31	-3.31	0.29 KWD	0.99	15.16
Technology	691.13	0.00	-4.90	0.00	1.06	1.06	0.01 KWD	0.82	0.00
Utilities	594.74	0.00	0.44	2.26	-0.88	-0.88	0.25 KWD	4.01	19.20



### What Move the GCC markets

#### Oil Prices

Oil prices jumped \$3 on Monday, with Brent above \$110 a barrel, as European Union nations consider joining the United States in a Russian oil embargo, while a weekend attack on Saudi oil facilities caused jitters, Brent crude futures climbed 4.3% to \$112.55 per barrel.

#### Kuwait Market

The market closed today up by + 0.01%, closed at 7,866.31 value traded 55.9 million KD, Premier market value traded reached 40.6 million KD and closed at 8,683.96 down by - 0.07%.

#### Saudi Market

The Market closed down today by - 0.34%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	1.127	-0.18	-0.62	6.82	13.04	13.04	8.11 KWD	2.04	27.00
KFH	0.988	0.00	-1.20	4.66	18.75	18.75	8.34 KWD	3.83	32.00
Zain	0.624	-0.16	-1.42	0.65	4.87	4.87	2.70 KWD	2.27	14.54
BOUBYAN BANK	0.940	0.97	0.64	14.22	18.99	18.99	2.99 KWD	4.19	34.00
Agility	1.027	-0.19	0.10	1.08	8.68	8.68	2.29 KWD	1.05	2.19
<b>Saudi Arabia</b>									
ARAMCO	42.95	-0.69	4.50	3.37	19.97	19.97	8,589.77 SAR	8.04	21.80
SABIC	128.00	-0.31	-3.03	2.73	10.34	10.34	383.99 SAR	2.13	35.00
STC	109.40	0.55	-1.62	-4.04	-2.67	-2.67	218.79 SAR	3.15	19.22
AL-RAJHI BANK	158.20	-0.38	2.59	-1.37	11.57	11.57	395.49 SAR	5.88	26.92
NCB	70.00	1.45	1.01	2.64	8.70	8.70	313.45 SAR	1.91	19.94
<b>United Arab Emirates</b>									
ETISALAT.AD	35.06	-1.13	0.17	0.23	10.60	10.60	304.88 AED	6.41	32.73
FAB.AD	21.50	0.47	-3.15	5.18	15.45	15.45	237.50 AED	2.10	19.50
EMIRATES NBD	14.10	2.17	-4.73	-1.40	4.06	4.06	89.06 AED	1.07	10.22
DB ISLAMIC BK	6.00	-0.17	0.00	-1.48	11.52	11.52	43.44 AED	1.12	11.37
EMAAR PROPERT	5.35	-0.93	0.94	5.31	9.41	9.41	43.76 AED	0.71	10.28
<b>Qatar</b>									
QNB	22.60	0.40	-0.44	3.67	11.94	11.94	208.00 QAR	2.11	17.09
INDUSTRIES QAT	19.39	0.05	-1.57	5.96	25.18	25.18	116.89 QAR	2.97	14.50
QA ISLAMIC BK	22.91	1.19	0.39	8.63	24.99	24.99	53.94 QAR	2.19	16.12
MASRAF AL RAYA	5.13	0.12	0.77	2.56	10.52	10.52	47.52 QAR	1.95	22.39
MESAIEED PETRO	2.81	0.50	-6.74	5.21	34.40	34.40	35.16 QAR	2.07	18.95
<b>OMAN</b>									
BANK MUSCAT	0.554	0.73	-1.77	6.54	14.46	14.46	1.98 OMR	0.92	8.33
OMANTEL	0.880	1.85	2.80	8.91	17.02	17.02	0.66 OMR	1.17	7.69
BANK DHOVAR	0.118	-2.48	0.85	7.27	-6.35	-6.35	0.36 QAR	0.51	14.93
NAT BANK OF OMAN	0.210	0.00	-1.87	10.53	6.60	6.60	0.34 QAR	0.61	12.71
OMINVEST	0.326	-1.21	-4.12	2.52	6.54	6.54	0.22 QAR	0.96	6.85

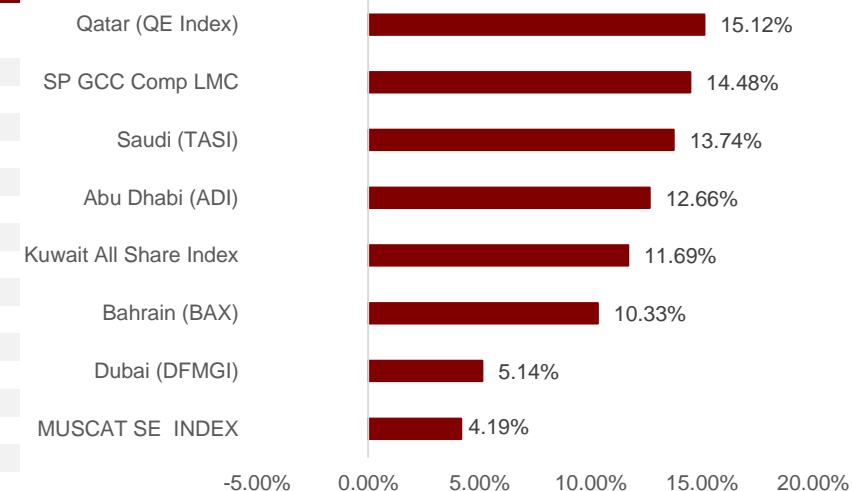
Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
9-Mar-22	21.54%	12.62%	0.06%	0.47%	0.37%	6.19%	2.46%	10.60%	5.30%	4.25%
16-Mar-22	21.76%	12.67%	0.06%	0.47%	0.37%	6.28%	2.48%	10.62%	5.33%	4.27%

### End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC

### GCC YTD% Performance



### Leading Sector, Security Performance

#### Kuwait

The market is up today by +0.01 % The leading sector best performance indices today are Insurance 0.64 % Consumer Disc 0.56 % Basic materials 0.36 % respectively

Telecommunication sector are down today by -0.01 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by +2.93 %

#### KSA

Saudi Armco has a negative performance today by -0.69 %, SABIC has a negative performance today by -0.31 %

STC has a positive performance today by +0.55 %, Al Rajhi Bank has a negative performance today by -0.38 %

#### UAE

ETISALAT AD has a negative performance today by -1.13 %, FAB.AD has a positive performance today by +0.47 %



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