

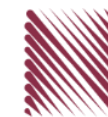


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, April 7, 2022





Market Watch

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	13,313.98	0.44	1.71	1.71	1.71	18.01	12,010 SAR	2.49	21.66
Qatar (QE Index)	14,089.47	1.54	4.11	4.11	4.11	21.19	724 QAR	1.85	17.69
Dubai (DFMGI)	3,541.61	0.44	-0.60	-0.32	-0.32	9.99	345 AED	1.64	23.60
Abu Dhabi (ADI)	10,093.56	-0.71	0.68	0.48	0.48	17.76	1,435 AED	1.77	20.38
Bahrain (BAX)	2,120.87	0.07	2.28	2.28	2.28	18.01	22 BHD	1.18	17.51
MUSCAT SE INDEX	4,209.54	1.61	0.10	0.10	0.10	1.94	5 OMR	0.92	13.25
SP GCC Comp LMC	227.56	0.47	2.06	2.04	2.04	19.93			

Developed Markets

MSCI World Index	3,012.19	0.06	-1.41	-1.28	-1.28	-6.73			
U.S. (S&P 500)	4,488.28	0.43	-1.00	-0.67	-0.67	-5.58			
U.K. (FTSE 100)	7,669.56	-0.47	0.18	0.48	0.48	2.27			
Japan (Topix)	1,896.79	-1.56	-2.64	-2.75	-2.75	-4.99			

Emerging Markets

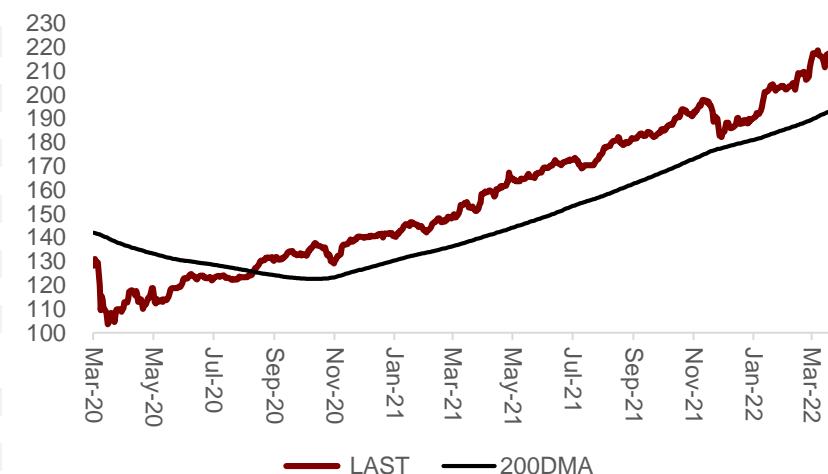
MSCI EM Index	1,127.93	-1.44	-1.73	-1.38	-1.38	-8.60			
China (SSE Composite)	3,251.85	-1.42	-1.40	-0.48	-0.48	-11.07			
India (Sensex)	59,447.18	-0.97	-0.41	0.80	0.80	1.34			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	8,261.01	0.09	1.40	1.40	1.40	17.29	49.04 KWD	2.52	29.49
Kuwait Permier Index	9,166.38	-0.16	1.16	1.16	1.16	19.99	37.64 KWD	2.73	30.95
Kuwait Main Index	6,397.02	0.98	2.27	2.27	2.27	8.68	11.41 KWD	1.82	24.68
NIC 50	10,245.13	0.13	1.15	1.15	1.15	20.21	28.60 KWD	2.71	29.95

Kuwait Sector

Banking	1,956.87	-0.65	1.38	1.38	1.38	20.59	29.05 KWD	1.34	31.95
Telecom	1,329.28	2.50	5.32	5.32	5.32	22.02	4.08 KWD	0.83	21.32
Industrials	1,335.98	2.45	3.17	3.17	3.17	17.04	4.77 KWD	0.99	24.89
Financial services	1,640.26	0.64	-1.24	-1.24	-1.24	15.24	4.20 KWD	0.96	22.63
Real estate	1,404.54	0.15	0.67	0.67	0.67	5.89	3.03 KWD	0.73	24.38
Basic materials	1,147.47	-0.38	-1.23	-1.23	-1.23	11.97	1.02 KWD	1.84	29.40
Health care	511.16	0.00	3.26	3.26	3.26	-35.87	0.25 KWD	3.21	15.85
Consumer services	707.59	0.09	-0.58	-0.58	-0.58	-3.22	0.79 KWD	0.94	17.17
Insurance	1,576.01	-0.73	-2.79	-2.79	-2.79	2.78	0.66 KWD	0.76	9.91
Consumer Disc	1,540.10	0.24	-0.19	-0.19	-0.19	15.22	0.22 KWD	1.30	10.56
Energy	1,284.39	-1.44	-1.11	-1.11	-1.11	-10.07	0.27 KWD	0.92	16.25
Technology	688.94	-4.34	1.83	1.83	1.83	0.74	0.01 KWD	0.82	0.00
Utilities	589.47	0.45	0.45	0.45	0.45	-1.76	0.25 KWD	3.97	19.03

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

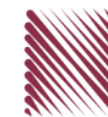
Oil prices clawed back some losses on Thursday after tumbling more than 5% to a three-week low in the previous session after consuming nations announced a huge release of oil from emergency reserves to offset supply lost from Russia, Brent crude futures climbed \$1.49, or 1.5%, to \$102.56 a barrel.

Kuwait Market

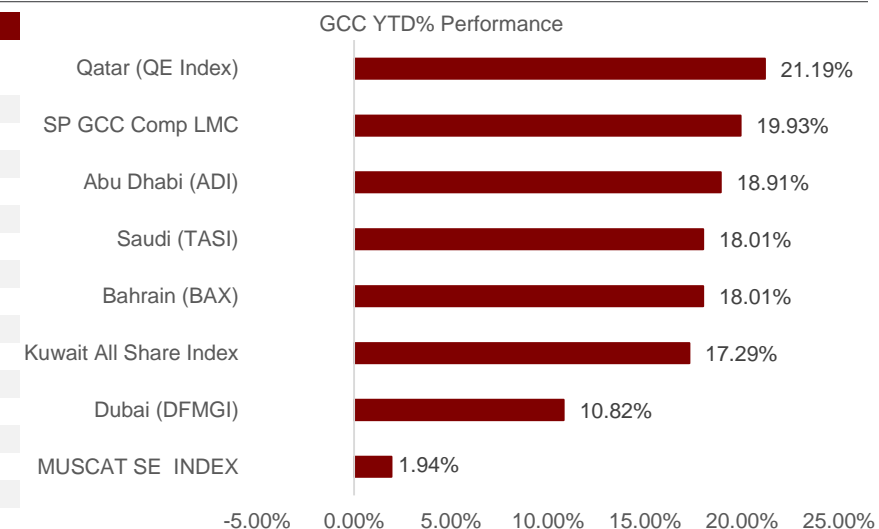
The market closed today up by + 0.09%, closed at 8,261.01 value traded 81.0 million KD, Premier market value traded reached 60.4 million KD and closed at 9,166.38 down by - 0.16%.

Saudi Market

The Market closed up today by + 0.44%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.



	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	1.055	-0.38	-4.00	-4.00	-4.00	11.11	7.97 KWD	2.00	27.00
KFH	1.007	-1.66	3.43	3.43	3.43	33.14	9.35 KWD	4.30	32.00
Zain	0.614	0.66	-2.23	-2.23	-2.23	3.19	2.66 KWD	2.23	14.31
BOUBYAN BANK	0.916	0.99	2.43	2.43	2.43	21.75	3.06 KWD	4.28	34.00
Agility	1.178	3.88	6.61	6.61	6.61	24.66	2.63 KWD	1.23	2.54
Saudi Arabia									
ARAMCO	42.85	-0.35	-0.58	-0.58	-0.58	19.69	8,569.31 SAR	7.69	21.75
SABIC	134.40	1.05	2.60	2.60	2.60	15.86	403.17 SAR	2.24	35.00
STC	116.00	2.47	7.61	7.61	7.61	3.20	231.98 SAR	3.34	20.00
AL-RAJHI BANK	164.40	1.23	2.37	2.37	2.37	15.94	410.97 SAR	6.11	27.53
NCB	72.00	1.69	1.55	1.55	1.55	11.80	322.39 SAR	1.97	20.46
United Arab Emirates									
ETISALAT.AD	37.22	-3.58	-0.16	0.70	0.70	17.41	328.56 AED	6.90	34.74
FAB.AD	23.88	-0.25	1.96	1.19	1.19	28.23	263.60 AED	2.34	21.65
EMIRATES NBD	14.65	-1.01	-2.33	-2.33	-2.33	8.12	91.59 AED	1.10	10.62
DB ISLAMIC BK	6.09	1.00	-1.77	-1.30	-1.30	13.20	44.53 AED	1.14	11.55
EMAAR PROPERT	5.94	1.89	-0.83	-1.00	-1.00	21.47	49.41 AED	0.80	11.41
Qatar									
QNB	24.29	3.36	5.29	5.29	5.29	20.31	224.35 QAR	2.27	18.37
INDUSTRIES QAT	19.60	2.08	3.16	3.16	3.16	26.53	118.58 QAR	3.00	14.66
QA ISLAMIC BK	25.21	-0.36	5.75	5.75	5.75	37.53	59.57 QAR	2.41	17.73
MASRAF AL RAYA	5.55	2.00	7.33	7.33	7.33	19.59	51.61 QAR	2.11	24.23
MESAIEED PETRO	2.88	-0.48	-1.03	-1.03	-1.03	37.80	36.18 QAR	2.12	19.43
OMAN									
BANK MUSCAT	0.544	2.64	6.67	6.67	6.67	18.02	2.03 OMR	0.94	8.33
OMANTEL	0.880	2.33	0.46	0.46	0.46	17.02	0.66 OMR	1.17	7.69
BANK DHOFAR	0.113	0.00	-1.74	-1.74	-1.74	-10.32	0.34 QAR	0.48	14.93
NAT BANK OF OMAN	0.200	1.01	-2.44	-2.44	-2.44	1.52	0.33 QAR	0.59	12.71
OMINVEST	0.318	0.00	-5.92	-5.92	-5.92	3.92	0.21 QAR	0.93	6.85



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.09 % The leading sector best performance indices today are Telecom 2.5 % Industrials 2.45 % Financial services 0.64 % respectively

Telecommunication sector are up today by + 2.5 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 4.73 %

KSA

Saudi Armco has a negative performance today by -0.35 %, SABIC has a positive performance today by + 1.05 %

STC has a positive performance today by + 2.47 %, Al Rajhi Bank has a positive performance today by + 1.23 %

UAE

ETISALAT .AD has a negative performance today by -3.58 %, FAB.AD has a negative performance today by -0.25 %

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
30-Mar-22	21.89%	12.79%	0.06%	0.48%	0.36%	6.89%	2.55%	10.67%	5.44%	3.98%
6-Apr-22	21.97%	12.93%	0.06%	0.48%	0.36%	7.06%	2.53%	10.72%	5.46%	3.99%

End of Report

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