

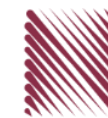


شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Monday, February 7, 2022



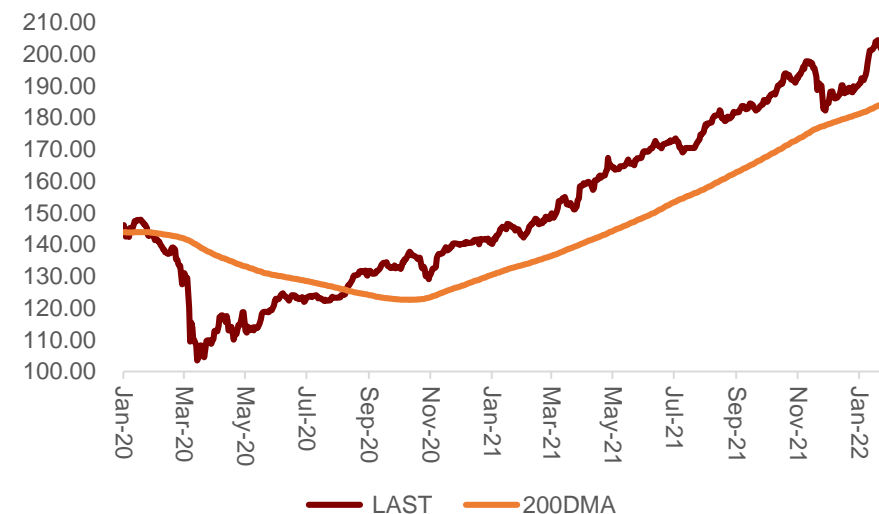


### Market Watch Monday, February 7, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>GCC Markets</b>		%	%	%	%	%			
Saudi (TASI)	12,249.190	0.37	0.88	-0.18	8.58	8.58	10,447 SAR	2.61	18.80
Qatar (QE Index)	12,672.950	-0.04	0.14	1.40	9.01	9.01	644 QAR	1.79	16.22
Dubai (DFMGI)	3,188.820	0.57	0.57	-0.45	-0.22	-0.22	315 AED	1.56	17.83
Abu Dhabi (ADI)	8,734.390	0.02	0.02	0.35	2.90	2.90	1,435 AED	1.79	35.48
Bahrain (BAX)	1,840.754	0.41	0.90	1.71	2.42	2.42	19 BHD	1.52	9.94
MUSCAT SE INDEX	4,132.696	0.01	0.13	0.41	0.08	0.08	5 OMR	0.87	13.25
SP GCC Comp LMC	203.676	0.24	0.66	0.05	7.35	7.35			
<b>Developed Markets</b>									
MSCI World Index	3,059.44	-0.07	-0.07	0.01	-5.49	-5.49			
U.S. (S&P 500)	4,483.87	-0.37	-0.37	-0.70	-6.17	-6.17			
U.K. (FTSE 100)	7,573.47	0.76	0.76	1.46	2.30	2.30			
Japan (Topix)	1,925.99	-0.24	-0.24	1.59	-3.33	1.59			
<b>Emerging Markets</b>									
MSCI EM Index	1,219.329	-0.15	-0.15	0.92	-0.28	-0.28			
China (SSE Composite)	3,429.58	2.03	2.03	2.03	-5.77	-5.77			
India (Sensex)	57,621.190	-1.75	-1.75	-0.68	-0.30	-0.30			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Kuwait</b>		%	%	%	%	%			
Kuwait All Share Index	7,419.85	-0.04	0.26	0.95	5.35	5.35	44.07 KWD	2.22	26.78
Kuwait Premier Index	8,045.25	0.00	0.01	0.31	5.22	5.22	32.94 KWD	2.35	26.80
Kuwait Main Index	6,206.81	-0.16	0.74	2.62	5.45	5.45	11.13 KWD	1.85	26.84
NIC 50	8,949.70	0.00	0.12	0.42	5.01	5.01	28.60 KWD	2.33	25.80
<b>Kuwait Sector</b>									
Banking	1,709.29	-0.04	-0.16	0.39	5.33	5.33	25.43 KWD	1.39	27.80
Telecom	1,175.43	-0.11	2.07	7.04	7.90	7.90	3.61 KWD	0.91	13.95
Industrials	1,204.01	0.10	0.83	1.48	5.48	5.48	4.27 KWD	0.97	14.57
Financial services	1,510.96	0.05	0.31	-0.49	6.16	6.16	3.89 KWD	0.87	12.84
Real estate	1,342.25	-0.27	-0.46	-0.58	1.19	1.19	2.91 KWD	0.73	47.36
Basic materials	1,115.36	0.36	1.01	0.32	8.84	8.84	0.99 KWD	1.86	28.90
Health care	821.70	0.00	1.94	1.84	3.10	3.10	0.41 KWD	6.16	13.82
Consumer services	728.48	0.05	-0.43	0.60	-0.36	-0.36	0.77 KWD	0.91	15.71
Insurance	1,590.42	0.15	5.39	4.08	3.72	3.72	0.67 KWD	0.80	8.51
Consumer Disc	1,485.76	-0.76	0.20	3.57	11.16	11.16	0.22 KWD	1.31	9.02
Energy	1,395.52	-0.05	-0.77	-3.34	-2.28	-2.28	0.29 KWD	1.02	15.41
Technology	713.68	-2.87	-3.82	-5.67	4.36	4.36	0.01 KWD	0.87	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

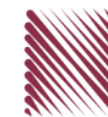
Oil prices rose on Monday, reversing earlier losses, as investors kept bullish sentiment on expectations that global supply would remain tight as demand picks up and shrugged off signs of progress in the U.S.-Iran nuclear talks, Brent crude was up 60 cents, or 0.6%, at \$93.87 a barrel.

##### Kuwait Market

The market closed today down by - 0.04%, closed at 7,419.85 value traded 51.7 million KD, Premier market value traded reached 25.2 million KD and closed at 8,045.25 flat.

##### Saudi Market

The Market closed up today by + 0.37%, and the current macroeconomic sentiments and volatility of oil prices linked by Omicron variant.



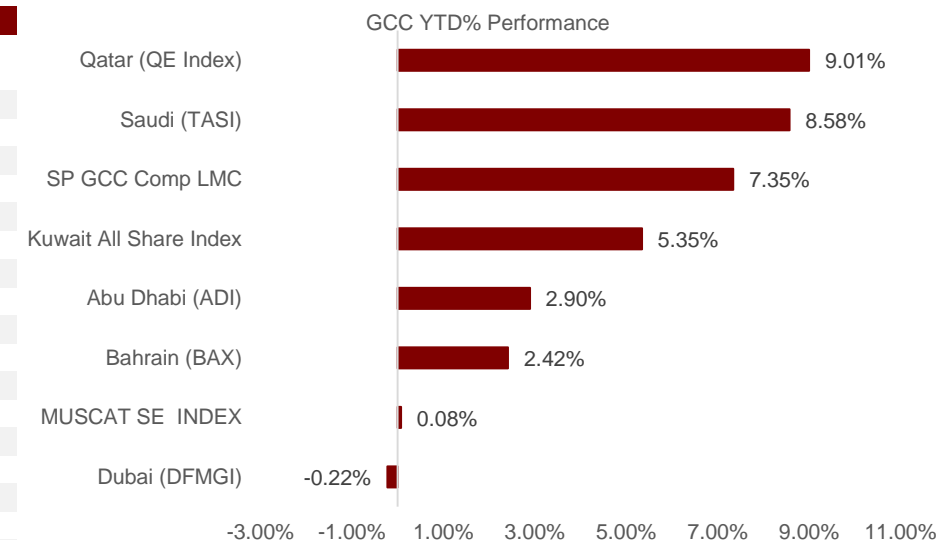
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
<b>Blue Chip Watch</b>									
<b>Kuwait</b>									
NBK	1.041	0.10	0.10	0.48	4.41	4.41	7.49 KWD	1.88	27.00
KFH	0.907	-0.11	-0.11	0.11	9.01	9.01	7.67 KWD	3.53	32.00
Zain	0.613	0.66	2.00	2.34	3.03	3.03	2.64 KWD	2.22	13.95
BOUBYAN BANK	0.805	-0.37	-0.25	-0.12	1.90	1.90	2.57 KWD	3.60	34.00
Agility	1.007	0.00	0.70	0.30	6.56	6.56	2.25 KWD	1.03	2.15
<b>Saudi Arabia</b>									
ARAMCO	37.05	0.68	0.41	-0.80	3.49	3.49	7,360.00 SAR	6.88	22.32
SABIC	121.00	-0.33	-0.33	-2.89	4.31	4.31	364.20 SAR	2.09	35.00
STC	116.00	0.00	-0.51	-1.19	3.20	3.20	232.00 SAR	3.38	20.64
AL-RAJHI BANK	149.40	0.40	0.95	0.81	5.36	5.36	372.00 SAR	5.85	26.70
NCB	72.10	0.28	0.42	-2.30	11.96	11.96	321.97 SAR	2.00	23.11
<b>United Arab Emirates</b>									
ETISALAT.AD	33.08	1.04	1.04	-0.06	4.35	4.35	284.73 AED	6.18	30.85
FAB.AD	19.68	-1.30	-1.30	-1.60	4.46	4.46	217.74 AED	1.93	17.87
EMIRATES NBD	13.50	1.89	1.89	1.12	-0.37	-0.37	83.69 AED	1.00	9.60
DB ISLAMIC BK	5.52	0.55	0.55	0.36	2.60	2.60	39.75 AED	1.02	10.41
EMAAR PROPERT	4.69	-1.05	-1.05	-3.50	-4.09	-4.09	38.77 AED	0.59	12.30
<b>Qatar</b>									
QNB	21.83	0.14	0.00	-0.18	7.97	7.97	201.78 QAR	2.04	16.49
INDUSTRIES QAT	16.92	0.18	0.89	0.53	9.23	9.23	102.18 QAR	2.73	15.34
QA ISLAMIC BK	20.16	0.35	-0.20	2.65	9.77	9.77	47.57 QAR	1.92	14.13
MASRAF AL RAYA	4.97	-0.24	-0.92	1.12	7.11	7.11	46.33 QAR	1.89	21.76
MESAIEED PETRO	2.62	0.92	3.35	7.60	25.36	25.36	32.61 QAR	1.95	19.89
<b>OMAN</b>									
BANK MUSCAT	0.524	-0.76	-0.38	0.77	8.26	8.26	1.89 OMR	0.88	8.33
OMANTEL	0.800	0.00	-0.99	1.52	6.38	6.38	0.60 OMR	1.07	7.69
BANK DHOFAR	0.120	0.00	0.00	0.84	-4.76	-4.76	0.36 QAR	0.51	14.93
NAT BANK OF OMAN	0.190	1.06	1.06	0.53	-3.55	-3.55	0.31 QAR	0.55	12.71
OMINVEST	0.302	-1.95	0.65	1.32	0.65	0.65	0.25 QAR	0.90	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 down today by -0.04 % The leading sector bottom performance indices today are Technology -2.87 % Consumer Disc -0.76 % Real estate -0.27 % respectively

Telecommunication sector are down today by -0.11 % and act defensively in COVID19 also it outperform Kuwait all Share Index in YTD perspective by + 2.55 %

#### KSA

Saudi Armco has a positive performance today by + 0.68 %, SABIC has a negative performance today by - 0.33 %

STC has a flat performance today, Al Rajhi Bank has a positive performance today by + 0.40 %

#### UAE

ETISALAT AD closed up today by + 1.04 %, 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](http://www.nic.com.kw)