



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, December 14th 2022

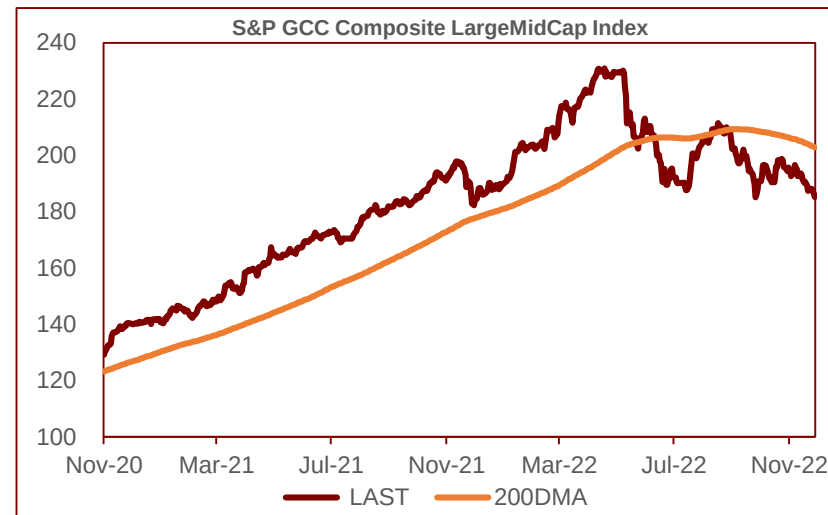




Market Watch

Wednesday, December 14, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,248.12	0.26	0.01	-5.95	-10.15	-9.16	9,547 SAR	1.57	14.80
Qatar (QE Index)	11,080.21	-0.93	-3.56	-7.09	-12.72	-4.69	564 QAR	1.32	13.07
Dubai (DFMGI)	3,310.85	0.32	-0.11	-0.39	-0.85	3.60	441 AED	1.21	13.07
Abu Dhabi (ADI)	10,056.29	0.07	-2.12	-4.70	3.13	18.47	1,435 AED	1.97	19.43
Bahrain (BAX)	1,853.79	0.08	-0.09	-0.60	-1.50	3.15	19 BHD	1.81	15.26
MUSCAT SE INDEX	4,866.48	-0.66	1.72	5.48	7.47	17.85	5 OMR	0.99	13.25
SP GCC Comp LMC	176.91	-0.03	-0.74	-5.91	-7.23	-6.77			
SP UAE PRICE INDEX	135.69	0.32	-2.43	-6.23	-2.18	-7.98			
Developed Markets									
MSCI World Index	2,705.31	-0.37	1.31	-0.57	13.73	-16.29			
U.S. (S&P 500)	3,995.32	-0.61	0.80	-2.08	11.43	-16.17			
U.K. (FTSE 100)	7,495.93	-0.09	0.32	-1.02	8.73	1.51			
Japan (Topix)	1,977.42	0.60	1.85	-0.41	7.71	-0.75			
Emerging Markets									
MSCI EM Index	973.71	0.88	0.46	0.15	11.18	-20.97			
China (SSE Composite)	3,176.53	0.01	-0.65	0.80	5.03	-12.73			
India (Sensex)	62,677.91	0.23	0.17	-0.67	9.14	7.59			
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,390.50	0.08	-0.80	-2.56	4.01	4.93	47.82 KWD	2.15	29.35
Kuwait Premier Index	8,227.87	0.08	-1.11	-3.11	3.50	7.71	37.67 KWD	2.27	25.28
Kuwait Main Index	5,664.73	0.06	0.48	-0.29	6.11	-3.76	10.16 KWD	1.66	44.54
NIC 50	9,223.53	0.12	-1.12	-3.12	3.49	8.23	28.60 KWD	2.25	24.28
Kuwait Sector									
Banking	1,817.31	0.13	-0.53	-2.55	4.25	11.99	30.63 KWD	1.38	26.28
Telecom	1,204.55	0.81	-0.09	-0.79	3.54	10.57	3.70 KWD	2.08	12.39
Industrials	1,083.05	-0.90	-2.75	-4.68	6.54	-5.12	3.82 KWD	0.80	18.78
Financial services	1,283.89	-0.67	-2.11	-3.67	2.40	-9.80	3.62 KWD	0.72	16.26
Real estate	1,246.89	0.52	-0.86	-2.71	3.72	-6.00	2.69 KWD	0.59	21.99
Basic materials	875.07	0.87	0.54	-0.75	-2.92	-14.61	0.78 KWD	1.28	8.48
Health care	463.66	0.00	2.06	2.06	0.85	-41.83	0.23 KWD	2.64	11.92
Consumer services	498.85	0.06	-2.55	2.09	6.74	-31.77	0.75 KWD	0.93	11.55
Insurance	1,541.75	0.02	-0.36	-0.13	2.70	0.55	0.64 KWD	0.81	9.33
Consumer Disc	1,457.13	0.75	0.00	-1.48	5.19	9.02	0.15 KWD	1.01	0.00
Energy	1,125.89	0.27	-1.40	3.15	5.47	-21.16	0.23 KWD	0.83	4.70
Technology	792.97	0.00	2.83	2.83	34.57	15.96	0.01 KWD	0.97	0.00
Utilities	500.00	0.53	0.00	-3.55	-2.56	-16.67	0.21 KWD	1.76	15.63



What Move the GCC markets

Oil Prices

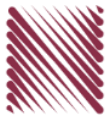
Oil prices were largely unchanged in early Asian trade as traders weighed optimism over China's demand outlook against the possibility of further interest rate hikes from global central banks. Brent crude futures were up 1 cent at \$82.71 per barrel.

Kuwait Market

The market closed up today by + 0.08% at 7,390.50 value traded 41.9 million KD, Premier market value traded reached 16.5 million KD up by + 0.08% at 8,227.87

KSA Market

The market closed up today by + 0.26% at 10,248.12.



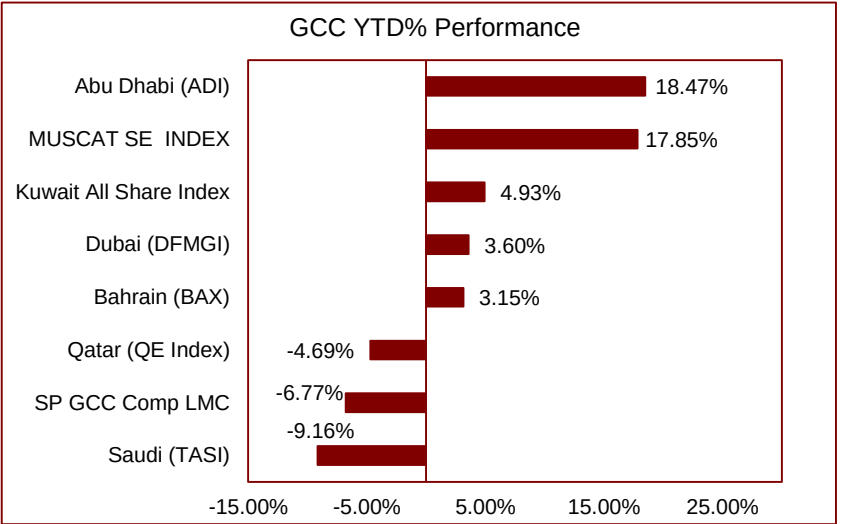
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.098	0.09	0.37	-2.14	12.50	15.64	8.30 KWD	2.11	27.00
KFH	0.833	0.12	-2.00	-3.81	-0.95	10.13	11.19 KWD	3.44	32.00
Zain	0.579	1.22	-0.52	-1.36	-1.03	-2.69	2.51 KWD	2.08	12.39
BOUBYAN BANK	0.809	-0.12	-1.46	-4.15	5.75	13.57	3.03 KWD	3.21	34.00
Agility	0.731	-1.22	-3.82	-7.12	9.43	-7.17	1.96 KWD	1.35	47.78
Saudi Arabia									
ARAMCO	30.95	0.98	-1.43	-7.61	-13.67	-4.90	6,809.54 SAR	4.90	11.71
SABIC	81.00	0.00	-0.61	-2.41	-8.78	-30.17	243.02 SAR	1.33	35.00
STC	36.75	0.41	0.55	-4.42	-6.61	-18.26	183.76 SAR	2.50	15.19
AL-RAJHI BANK	74.30	-0.93	-0.93	-7.70	-8.61	-16.16	297.22 SAR	3.45	19.73
NCB	49.00	-1.01	4.48	-4.67	-22.35	-23.91	219.44 SAR	1.34	11.94
United Arab Emirates									
ETISALAT.AD	22.96	-1.12	-3.53	-11.01	-1.71	-27.57	201.76 AED	4.24	21.66
FAB.AD	16.00	1.27	-4.08	-9.09	-10.41	-14.08	176.76 AED	1.57	12.71
EMIRATES NBD	13.00	1.96	0.78	-1.89	1.17	-4.06	82.12 AED	0.93	7.76
DB ISLAMIC BK	5.49	0.37	-2.14	-3.35	-8.19	2.04	39.75 AED	0.98	8.01
EMAAR PROPERT	6.00	-2.76	-1.48	-1.32	3.63	22.70	49.08 AED	0.75	6.91
Qatar									
QNB	17.69	-0.23	-1.56	-9.74	-11.11	-12.38	163.29 QAR	1.56	12.67
INDUSTRIES QAT	13.40	-4.22	-7.07	-10.01	-20.71	-13.49	81.02 QAR	2.00	8.54
QA ISLAMIC BK	21.00	-2.60	-9.09	-13.51	-14.98	14.57	49.59 QAR	1.88	13.47
MASRAF AL RAYA	3.24	-1.22	-5.40	-8.42	-21.36	-30.17	30.11 QAR	1.25	20.28
MESAIEED PETRO	2.19	-0.27	-1.49	-6.22	-7.02	4.55	27.43 QAR	1.60	14.49
OMAN									
BANK MUSCAT	0.293	-1.01	-0.68	4.64	2.09	27.13	2.20 OMR	1.01	8.33
OMANTEL	0.920	3.60	1.32	5.50	4.55	22.34	0.69 OMR	1.17	7.69
BANK DHOFAR	0.175	0.00	5.42	12.90	23.24	38.89	0.52 QAR	0.74	14.93
NAT BANK OF OMAN	0.296	-0.34	0.34	2.78	9.63	50.25	0.48 QAR	0.83	12.71
OMINVEST	0.420	-1.41	5.00	7.14	26.51	37.25	0.28 QAR	0.84	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
30-Nov 22	24.59%	17.27%	0.06%	1.21%	0.36%	4.55%	17.72%	11.86%	5.90%	5.19%
7-Dec 22	24.59%	17.38%	0.06%	1.23%	0.37%	4.57%	17.75%	11.92%	5.95%	4.99%

End of Report

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Leading Sector, Security Performance

Kuwait

The market is up today by + 0.08 %The leading sector best performance indices today are Basic materials 0.87 % Telecom 0.81 % Consumer Disc 0.75 % respectively

KSA

Saudi Armco has a positive performance today by + 0.98 %, SABIC has a flat performance today, STC has a positive performance today by + 0.41 %, Al Rajhi Bank has a negative performance today by -0.93 %

U.A.E

ETISALAT .AD has a negative performance today by -1.12 %, FAB.AD has a positive performance today by + 1.27 %



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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