

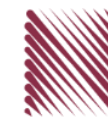


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, December 19th 2022

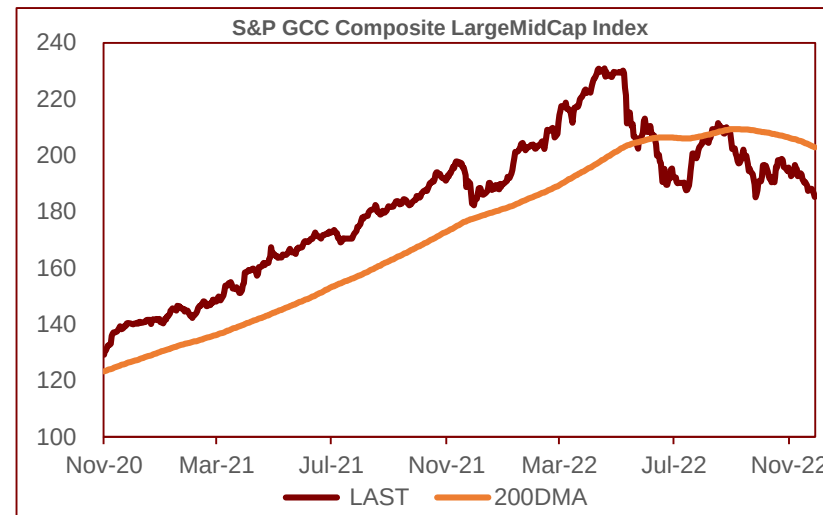




Market Watch

Monday, December 19, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,186.18	-0.64	-1.01	-6.52	-10.69	-9.71	9,526 SAR	1.57	14.93
Qatar (QE Index)	10,986.55	0.09	0.09	-7.88	-13.46	-5.50	557 QAR	1.32	13.05
Dubai (DFMGI)	3,340.13	0.34	0.75	0.49	0.03	4.51	442 AED	1.22	13.14
Abu Dhabi (ADI)	10,358.40	0.30	1.87	-1.84	6.23	22.03	1,435 AED	1.99	19.39
Bahrain (BAX)	1,854.03	0.00	0.00	-0.58	-1.49	3.16	19 BHD	1.80	14.91
MUSCAT SE INDEX	4,802.52	0.18	-1.11	4.09	6.05	16.30	5 OMR	0.99	13.25
SP GCC Comp LMC	176.59	-0.22	-0.22	-6.08	-7.40	-6.94			
SP UAE PRICE INDEX	140.19	0.34	2.38	-3.13	1.06	-4.94			
Developed Markets									
MSCI World Index	2,585.89	-0.77	-1.93	-4.96	8.71	-19.98			
U.S. (S&P 500)	3,817.66	-0.90	-2.00	-6.43	6.47	-19.90			
U.K. (FTSE 100)	7,361.31	0.40	-0.87	-2.80	6.78	-0.31			
Japan (Topix)	1,935.41	-0.76	-1.95	-2.53	5.42	-2.86			
Emerging Markets									
MSCI EM Index	957.64	0.03	-0.27	-1.51	9.35	-22.27			
China (SSE Composite)	3,107.12	-1.92	-1.94	-1.40	2.74	-14.63			
India (Sensex)	61,806.19	0.76	0.01	-2.05	7.63	6.10			
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,297.32	0.26	-0.73	-3.79	2.70	3.61	47.18 KWD	2.13	29.34
Kuwait Premier Index	8,111.24	0.29	-0.80	-4.48	2.03	6.18	37.03 KWD	2.25	24.99
Kuwait Main Index	5,628.99	0.12	-0.43	-0.92	5.44	-4.37	10.15 KWD	1.72	45.30
NIC 50	9,077.99	0.29	-0.81	-4.49	2.02	6.52	28.60 KWD	2.23	23.99
Kuwait Sector									
Banking	1,800.84	0.43	-0.45	-3.43	3.30	10.97	30.30 KWD	1.37	25.99
Telecom	1,176.18	-0.49	-1.44	-3.13	1.10	7.97	3.60 KWD	2.01	11.94
Industrials	1,046.38	-0.28	-2.26	-7.91	2.93	-8.33	3.68 KWD	0.78	18.89
Financial services	1,254.62	-0.13	-1.50	-5.87	0.07	-11.85	3.57 KWD	0.68	16.24
Real estate	1,236.61	0.39	-0.71	-3.51	2.87	-6.77	2.69 KWD	0.58	21.55
Basic materials	873.18	0.12	0.76	-0.96	-3.13	-14.79	0.77 KWD	1.28	8.46
Health care	461.85	0.00	-0.39	1.67	0.46	-42.05	0.23 KWD	2.62	11.92
Consumer services	482.72	-0.43	-1.27	-1.21	3.29	-33.97	0.77 KWD	0.93	11.45
Insurance	1,535.01	0.35	-0.44	-0.57	2.26	0.11	0.63 KWD	0.79	9.43
Consumer Disc	1,482.38	1.46	1.29	0.22	7.02	10.90	0.15 KWD	0.98	0.00
Energy	1,131.33	0.02	-1.46	3.65	5.98	-20.78	0.24 KWD	0.83	4.70
Technology	734.77	8.37	7.56	-4.72	24.69	7.45	0.01 KWD	0.90	0.00
Utilities	492.11	-1.06	-0.53	-5.08	-4.10	-17.98	0.21 KWD	1.73	15.38



What Move the GCC markets

Oil Prices

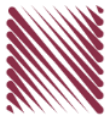
Oil prices reclaimed ground on Monday after tumbling more than \$2 a barrel in the previous session as optimism from China's reopening and oil demand recovery outweighed concerns of a global recession. Brent crude futures rose 72 cents, or 0.9%, to \$79.76 a barrel .

Kuwait Market

The market closed up today by + 0.26% at 7,297.32 value traded 22.7 million KD, Premier market value traded reached 19.1 million KD up by + 0.29% at 8,111.24

KSA Market

The market closed down today by – 0.64% at 10,186.18.

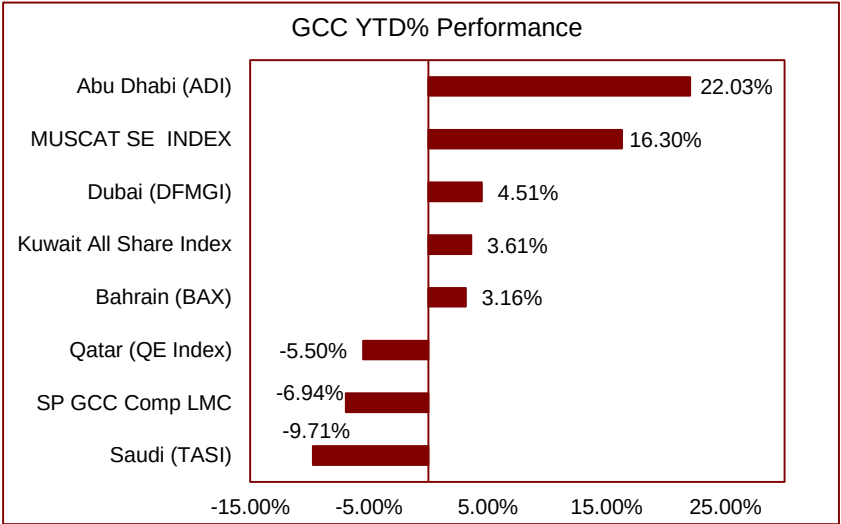


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.079	0.28	-0.74	-3.83	10.55	13.64	8.14 KWD	2.07	27.00
KFH	0.824	0.73	-0.48	-4.85	-2.02	8.94	11.05 KWD	3.40	32.00
Zain	0.558	-0.36	-2.45	-4.94	-4.62	-6.22	2.41 KWD	2.01	11.94
BOUBYAN BANK	0.816	0.74	0.00	-3.32	6.67	14.55	3.05 KWD	3.23	34.00
Agility	0.690	-1.29	-3.77	-12.33	3.29	-12.38	1.84 KWD	1.28	45.10
Saudi Arabia									
ARAMCO	30.95	0.32	-0.32	-7.61	-13.67	-4.90	6,807.73 SAR	4.90	11.79
SABIC	83.60	1.83	2.58	0.72	-5.86	-27.93	250.75 SAR	1.37	35.00
STC	35.75	-0.83	-1.52	-7.02	-9.15	-20.48	178.72 SAR	2.43	14.97
AL-RAJHI BANK	73.00	-0.68	-0.54	-9.32	-10.21	-17.63	291.95 SAR	3.39	19.33
NCB	48.00	-2.34	-2.93	-6.61	-23.93	-25.47	214.90 SAR	1.31	11.85
United Arab Emirates									
ETISALAT.AD	23.90	-0.42	2.58	-7.36	2.31	-24.61	208.72 AED	4.39	22.40
FAB.AD	17.36	1.52	5.85	-1.36	-2.80	-6.78	191.79 AED	1.70	13.79
EMIRATES NBD	13.15	-0.38	0.38	-0.75	2.33	-2.95	83.06 AED	0.94	7.85
DB ISLAMIC BK	5.70	0.35	1.79	0.35	-4.68	5.95	41.27 AED	1.02	8.32
EMAAR PROPERT	5.95	1.88	1.71	-2.14	2.76	21.68	48.67 AED	0.75	6.85
Qatar									
QNB	18.01	2.62	2.62	-8.11	-9.50	-10.80	164.89 QAR	1.59	12.90
INDUSTRIES QAT	12.99	-1.59	-1.59	-12.76	-23.14	-16.14	77.90 QAR	1.94	8.28
QA ISLAMIC BK	20.66	-0.05	-0.05	-14.91	-16.36	12.71	48.39 QAR	1.85	13.25
MASRAF AL RAYA	3.19	0.19	0.19	-9.75	-22.50	-31.19	29.43 QAR	1.23	19.98
MESAIEED PETRO	2.20	-0.50	-0.50	-5.62	-6.43	5.22	27.38 QAR	1.61	14.58
OMAN									
BANK MUSCAT	0.290	0.00	-1.02	3.57	1.05	25.83	2.18 OMR	1.00	8.33
OMANTEL	0.936	5.41	1.30	7.34	6.36	24.47	0.70 OMR	1.19	7.69
BANK DHOFAR	0.170	0.00	-2.86	9.68	19.72	34.92	0.51 QAR	0.72	14.93
NAT BANK OF OMAN	0.285	-1.72	-3.06	-1.04	5.56	44.67	0.46 QAR	0.80	12.71
OMINVEST	0.420	0.00	0.00	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
7-Dec 22	24.59%	17.38%	0.06%	1.23%	0.37%	4.57%	17.75%	11.92%	5.95%	4.99%
14-Dec 22	24.69%	17.29%	0.06%	1.23%	0.37%	4.56%	17.74%	12.33%	5.92%	4.98%

End of Report
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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is up today by + 0.26 %The leading sector best performance indices today are Technology 8.37 % Consumer Disc 1.46 % Banking 0.43 % respectively

KSA
Saudi Armco has a positive performance today by + 0.32 %, SABIC has a positive performance today by + 1.82 %, STC has a negative performance today by -0.83 %, Al Rajhi Bank has a negative performance today by -0.68 %.

U.A.E
ETISALAT .AD has a negative performance today by -0.42 %, FAB.AD has a positive performance today by + 1.52 %



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