

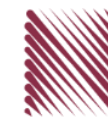


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, December 20th 2022





Market Watch

Tuesday, December 20, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,280.15	0.92	-0.10	-5.66	-9.87	-8.88	9,571 SAR	1.57	14.83
Qatar (QE Index)	10,964.30	-0.20	-0.11	-8.06	-13.63	-5.69	561 QAR	1.32	13.03
Dubai (DFMGI)	3,348.43	0.25	1.00	0.74	0.28	4.77	444 AED	1.22	13.23
Abu Dhabi (ADI)	10,343.07	-0.15	1.72	-1.98	6.07	21.85	1,435 AED	1.99	19.40
Bahrain (BAX)	1,856.96	0.16	0.16	-0.43	-1.33	3.32	19 BHD	1.81	15.15
MUSCAT SE INDEX	4,817.55	0.31	-0.80	4.42	6.39	16.66	5 OMR	0.99	13.25
SP GCC Comp LMC	177.67	0.61	0.39	-5.51	-6.83	-6.37			
SP UAE PRICE INDEX	140.01	-0.13	2.25	-3.25	0.93	-5.06			

Developed Markets

MSCI World Index	2,592.86	0.27	-1.67	-4.71	9.01	-19.77			
U.S. (S&P 500)	3,821.62	0.10	-1.90	-6.34	6.58	-19.82			
U.K. (FTSE 100)	7,370.62	0.13	-0.75	-2.67	6.92	-0.19			
Japan (Topix)	1,905.59	-1.54	-3.46	-4.03	3.79	-4.35			

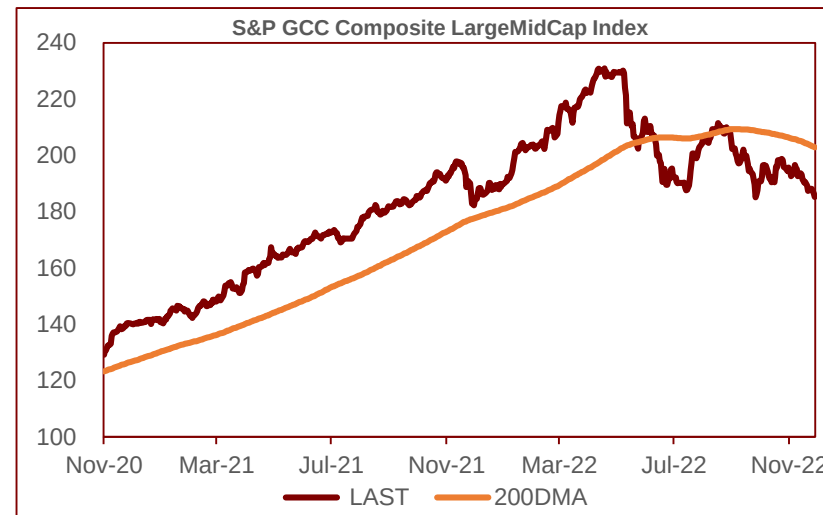
Emerging Markets

MSCI EM Index	951.09	-0.68	-0.95	-2.18	8.60	-22.80			
China (SSE Composite)	3,073.77	-1.07	-2.99	-2.46	1.63	-15.55			
India (Sensex)	61,702.29	-0.17	-0.16	-2.21	7.44	5.92			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,229.80	-0.93	-1.65	-4.68	1.75	2.65	46.72 KWD	2.11	29.10
Kuwait Premier Index	8,022.14	-1.10	-1.89	-5.53	0.91	5.01	36.64 KWD	2.21	24.70
Kuwait Main Index	5,615.71	-0.24	-0.67	-1.15	5.20	-4.60	10.08 KWD	1.69	45.18
NIC 50	8,974.06	-1.14	-1.90	-5.54	0.90	5.30	28.60 KWD	2.19	23.70

Kuwait Sector

Banking	1,785.48	-0.85	-1.30	-4.25	2.42	10.03	30.04 KWD	1.34	25.70
Telecom	1,159.76	-1.40	-2.82	-4.48	-0.31	6.46	3.56 KWD	1.96	11.68
Industrials	1,031.52	-1.42	-3.65	-9.21	1.47	-9.63	3.64 KWD	0.78	18.37
Financial services	1,237.76	-1.34	-2.82	-7.13	-1.27	-13.04	3.49 KWD	0.71	16.38
Real estate	1,227.18	-0.76	-1.46	-4.25	2.08	-7.48	2.67 KWD	0.58	21.46
Basic materials	865.37	-0.89	-0.14	-1.85	-4.00	-15.56	0.77 KWD	1.28	8.37
Health care	461.85	0.00	-0.39	1.67	0.46	-42.05	0.23 KWD	2.62	11.92
Consumer services	468.71	-2.90	-4.14	-4.08	0.29	-35.89	0.76 KWD	0.92	11.26
Insurance	1,536.29	0.08	-0.35	-0.49	2.34	0.19	0.63 KWD	0.80	9.43
Consumer Disc	1,465.28	-1.15	0.12	-0.93	5.78	9.62	0.14 KWD	0.96	0.00
Energy	1,221.34	7.96	6.38	11.90	14.41	-14.48	0.25 KWD	0.81	4.74
Technology	691.12	-5.94	1.17	-10.38	17.28	1.06	0.01 KWD	0.85	0.00
Utilities	492.11	0.00	-0.53	-5.08	-4.10	-17.98	0.21 KWD	1.73	15.38



What Move the GCC markets

Oil Prices

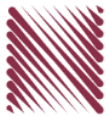
Oil prices rose on Tuesday, supported by a softer dollar and a U.S. plan to restock petroleum reserves, but gains were capped by uncertainty over the impact of rising Covid-19 cases in top oil importer China. Brent crude futures were up 50 cents, or 0.65%, at \$80.30 a barrel.

Kuwait Market

The market closed down today by - 0.93% at 7,229.80 value traded 34.9 million KD, Premier market value traded reached 25.4 million KD down by - 1.10% at 8,022.14

KSA Market

The market closed up today by + 0.92% at 10,280.15.

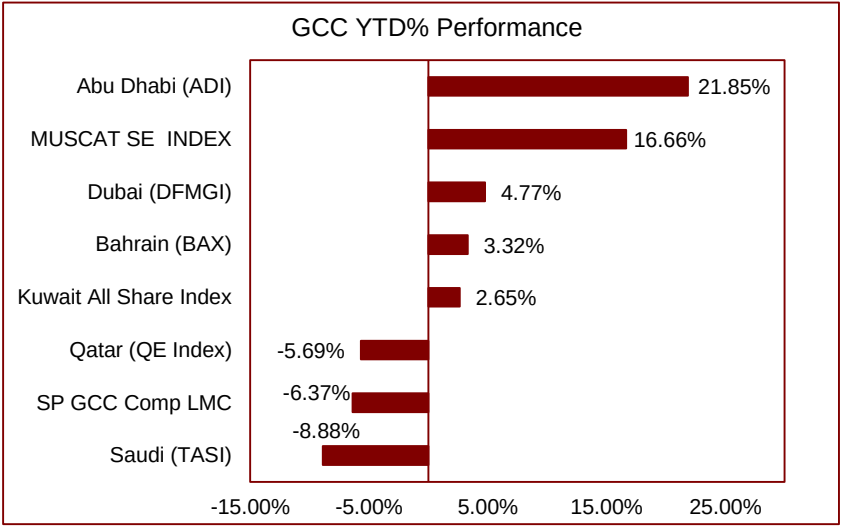


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.079	0.00	-0.74	-3.83	10.55	13.64	8.14 KWD	2.07	27.00
KFH	0.810	-1.70	-2.17	-6.47	-3.69	7.09	10.86 KWD	3.34	32.00
Zain	0.546	-2.15	-4.55	-6.98	-6.67	-8.24	2.36 KWD	1.96	11.68
BOUBYAN BANK	0.809	-0.86	-0.86	-4.15	5.75	13.57	3.02 KWD	3.21	34.00
Agility	0.678	-1.74	-5.44	-13.85	1.50	-13.90	1.81 KWD	1.25	44.31
Saudi Arabia									
ARAMCO	31.00	0.16	-0.16	-7.46	-13.53	-4.75	6,820.00 SAR	4.91	11.83
SABIC	86.00	2.87	5.52	3.61	-3.15	-25.86	258.00 SAR	1.41	35.00
STC	35.75	0.00	-1.52	-7.02	-9.15	-20.48	178.75 SAR	2.43	14.84
AL-RAJHI BANK	75.70	3.70	3.13	-5.96	-6.89	-14.58	302.80 SAR	3.52	19.20
NCB	47.85	-0.31	-3.24	-6.91	-24.17	-25.70	214.27 SAR	1.31	11.58
United Arab Emirates									
ETISALAT.AD	23.76	-0.59	1.97	-7.91	1.71	-25.05	207.85 AED	4.37	22.31
FAB.AD	17.46	0.58	6.46	-0.80	-2.24	-6.24	192.89 AED	1.71	13.87
EMIRATES NBD	13.20	0.38	0.76	-0.38	2.72	-2.58	83.38 AED	0.94	7.88
DB ISLAMIC BK	5.70	0.00	1.79	0.35	-4.68	5.95	41.27 AED	1.02	8.32
EMAAR PROPERT	5.94	-0.17	1.54	-2.30	2.59	21.47	48.59 AED	0.75	6.84
Qatar									
QNB	18.00	-0.06	2.56	-8.16	-9.55	-10.85	166.26 QAR	1.58	12.89
INDUSTRIES QAT	13.03	0.31	-1.29	-12.49	-22.90	-15.88	78.83 QAR	1.95	8.30
QA ISLAMIC BK	20.61	-0.24	-0.29	-15.12	-16.56	12.44	48.70 QAR	1.85	13.22
MASRAF AL RAYA	3.22	0.78	0.97	-9.04	-21.89	-30.65	29.93 QAR	1.24	20.14
MESAIEED PETRO	2.19	-0.41	-0.90	-6.01	-6.81	4.78	27.51 QAR	1.60	14.52
OMAN									
BANK MUSCAT	0.288	-0.69	-1.71	2.86	0.35	24.96	2.16 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	0.00	-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 down today by -0.93 %The leading sector bottom performance indices today are Technology -5.94 % Consumer services -2.9 % Industrials -1.42 % respectively

KSA
Saudi Armco has a positive performance today by + 0.16 %, SABIC have positive performance today by + 2.87 %, STC flat performance today 0 %, Al Rajhi Bank has a positive performance today by + 3.7 %

U.A.E
ETISALAT .AD has a negative performance today by -0.59 %, FAB.AD has a positive performance today by + 0.58 %



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