

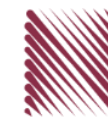


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, December 21st 2022

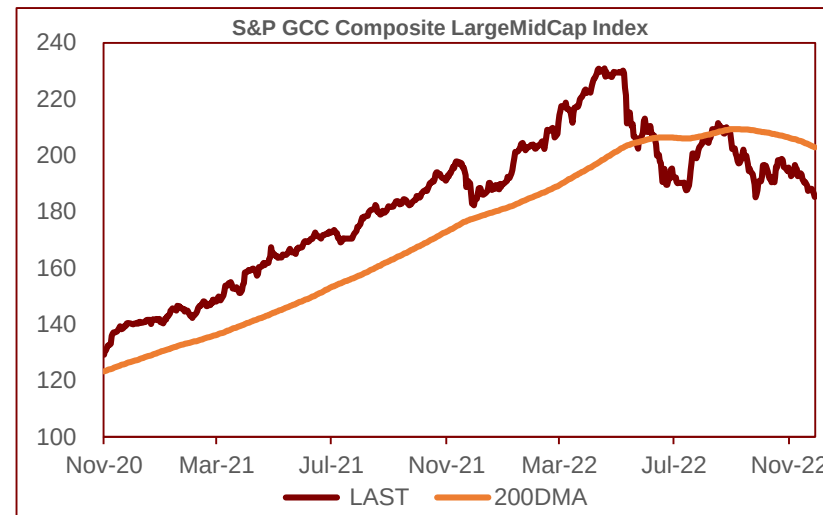




Market Watch

Wednesday, December 21, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	10,276.94	-0.03	-0.13	-5.69	-9.89	-8.91	9,568 SAR	1.58	14.82
Qatar (QE Index)	10,997.70	0.30	0.19	-7.78	-13.37	-5.40	563 QAR	1.33	13.11
Dubai (DFMGI)	3,339.79	-0.26	0.74	0.48	0.02	4.50	441 AED	1.22	13.16
Abu Dhabi (ADI)	10,339.59	-0.03	1.68	-2.02	6.04	21.81	1,435 AED	1.97	19.37
Bahrain (BAX)	1,856.97	0.00	0.16	-0.43	-1.33	3.32	19 BHD	1.75	15.13
MUSCAT SE INDEX	4,797.36	-0.42	-1.21	3.98	5.94	16.17	5 OMR	0.98	13.25
SP GCC Comp LMC	177.45	-0.12	0.27	-5.63	-6.95	-6.49			
SP UAE PRICE INDEX	139.81	-0.14	2.11	-3.39	0.78	-5.19			
Developed Markets									
MSCI World Index	2,626.92	1.31	-0.38	-3.45	10.44	-18.71			
U.S. (S&P 500)	3,878.44	1.49	-0.44	-4.94	8.17	-18.63			
U.K. (FTSE 100)	7,497.32	1.72	0.96	-1.00	8.75	1.53			
Japan (Topix)	1,893.32	-0.64	-4.08	-4.65	3.13	-4.97			
Emerging Markets									
MSCI EM Index	952.98	0.20	-0.75	-1.99	8.81	-22.65			
China (SSE Composite)	3,068.41	-0.17	-3.16	-2.63	1.46	-15.70			
India (Sensex)	61,067.24	-1.03	-1.18	-3.22	6.34	4.83			
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	7,205.61	-0.33	-1.98	-5.00	1.41	2.31	46.66 KWD	2.09	28.54
Kuwait Premier Index	7,999.55	-0.28	-2.17	-5.80	0.63	4.72	36.60 KWD	2.19	24.47
Kuwait Main Index	5,585.18	-0.54	-1.21	-1.69	4.62	-5.12	10.06 KWD	1.70	43.45
NIC 50	8,946.46	-0.31	-2.18	-5.81	0.62	4.97	28.60 KWD	2.17	23.47
Kuwait Sector									
Banking	1,775.45	-0.56	-1.85	-4.79	1.84	9.41	29.93 KWD	1.35	25.47
Telecom	1,154.24	-0.48	-3.28	-4.94	-0.79	5.95	3.55 KWD	1.97	11.73
Industrials	1,035.55	0.39	-3.27	-8.86	1.87	-9.28	3.66 KWD	0.78	18.39
Financial services	1,240.88	0.25	-2.58	-6.90	-1.03	-12.82	3.52 KWD	0.73	16.38
Real estate	1,224.66	-0.21	-1.67	-4.44	1.87	-7.67	2.67 KWD	0.58	21.53
Basic materials	873.87	0.98	0.84	-0.89	-3.05	-14.73	0.77 KWD	1.28	8.47
Health care	461.85	0.00	-0.39	1.67	0.46	-42.05	0.23 KWD	2.62	11.92
Consumer services	475.19	1.38	-2.81	-2.75	1.68	-35.00	0.77 KWD	0.90	11.34
Insurance	1,548.68	0.81	0.45	0.31	3.17	1.00	0.64 KWD	0.80	9.43
Consumer Disc	1,473.13	0.54	0.65	-0.40	6.35	10.21	0.14 KWD	0.97	0.00
Energy	1,192.62	-2.35	3.88	9.27	11.72	-16.49	0.25 KWD	0.81	4.58
Technology	742.05	7.37	8.63	-3.77	25.93	8.51	0.01 KWD	0.91	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

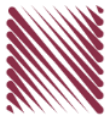
Oil prices rose on Wednesday after data suggested a larger than expected draw in U.S. crude stockpiles, but gains were capped by growing concerns over demand in China and a snow storm that is expected to hit U.S. travel. Brent crude futures were up \$1.18, or 1.5%, at \$81.17 a barrel.

Kuwait Market

The market closed down today by – 0.33% at 7,205.61 value traded 34.5 million KD, Premier market value traded reached 27.3 million KD down by – 0.28% at 7,999.55

KSA Market

The market closed down today by - 0.03% at 10,276.94.



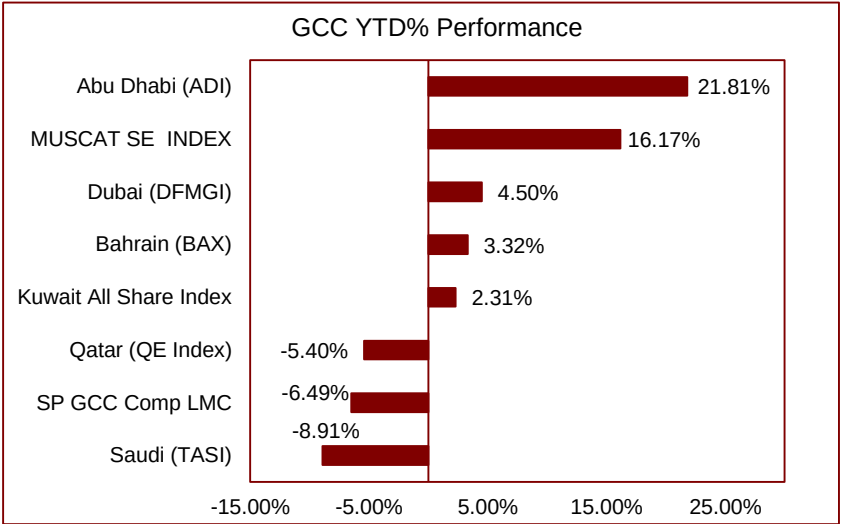
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.075	-0.37	-1.10	-4.19	10.14	13.21	8.13 KWD	2.07	27.00
KFH	0.804	-0.74	-2.90	-7.16	-4.40	6.30	10.80 KWD	3.32	32.00
Zain	0.548	0.37	-4.20	-6.64	-6.32	-7.90	2.37 KWD	1.97	11.73
BOUBYAN BANK	0.793	-1.98	-2.82	-6.04	3.66	11.32	2.97 KWD	3.14	34.00
Agility	0.675	-0.44	-5.86	-14.23	1.05	-14.29	1.81 KWD	1.25	44.12
Saudi Arabia									
ARAMCO	31.00	0.00	-0.16	-7.46	-13.53	-4.75	6,820.00 SAR	4.91	11.85
SABIC	84.80	-1.40	4.05	2.17	-4.50	-26.90	254.40 SAR	1.39	35.00
STC	35.70	-0.14	-1.65	-7.15	-9.28	-20.60	178.50 SAR	2.43	14.84
AL-RAJHI BANK	74.70	-1.32	1.77	-7.20	-8.12	-15.71	298.80 SAR	3.47	19.91
NCB	49.00	2.40	-0.91	-4.67	-22.35	-23.91	219.42 SAR	1.34	11.54
United Arab Emirates									
ETISALAT.AD	23.80	0.17	2.15	-7.75	1.88	-24.92	206.63 AED	4.34	22.18
FAB.AD	17.40	-0.34	6.10	-1.14	-2.58	-6.56	192.24 AED	1.71	13.82
EMIRATES NBD	13.25	0.38	1.15	0.00	3.11	-2.21	83.70 AED	0.95	7.91
DB ISLAMIC BK	5.63	-1.23	0.54	-0.88	-5.85	4.65	40.77 AED	1.00	8.22
EMAAR PROPERT	5.95	0.17	1.71	-2.14	2.76	21.68	48.67 AED	0.75	6.85
Qatar									
QNB	18.17	0.94	3.53	-7.30	-8.69	-10.00	167.83 QAR	1.60	13.01
INDUSTRIES QAT	13.06	0.23	-1.06	-12.29	-22.72	-15.69	79.01 QAR	1.95	8.32
QA ISLAMIC BK	20.58	-0.15	-0.44	-15.24	-16.68	12.27	48.63 QAR	1.85	13.20
MASRAF AL RAYA	3.24	0.53	1.51	-8.56	-21.48	-30.28	30.09 QAR	1.24	20.24
MESAIEED PETRO	2.18	-0.41	-1.31	-6.39	-7.19	4.35	27.40 QAR	1.60	14.46
OMAN									
BANK MUSCAT	0.286	-0.69	-2.39	2.14	-0.35	24.09	2.15 OMR	0.99	8.33
OMANTEL	0.928	4.50	0.43	6.42	5.45	23.40	0.70 OMR	1.18	7.69
BANK DHOFAR	0.168	-1.18	-4.00	8.39	18.31	33.33	0.50 QAR	0.71	14.93
NAT BANK OF OMAN	0.283	-0.70	-3.74	-1.74	4.81	43.65	0.46 QAR	0.79	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
14-Dec 22	24.69%	17.29%	0.06%	1.23%	0.37%	4.56%	17.74%	12.33%	5.92%	4.98%
21-Dec 22	24.69%	17.25%	0.06%	1.23%	0.37%	4.51%	17.73%	12.30%	5.91%	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 -0.33 %The leading sector bottom performance indices today are Energy -2.35 % Banking -0.56 % Telecom -0.48 % respectively

KSA

Saudi Armco flat performance today, SABIC has a negative performance today by -1.40%, STC has a negative performance today by -0.14 %, Al Rajhi Bank has a negative performance today by -1.32 %.

U.A.E

ETISALAT .AD has a positive performance today by + 0.17 %, FAB.AD has a negative performance today by -0.34 %



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