



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, December 22nd 2022

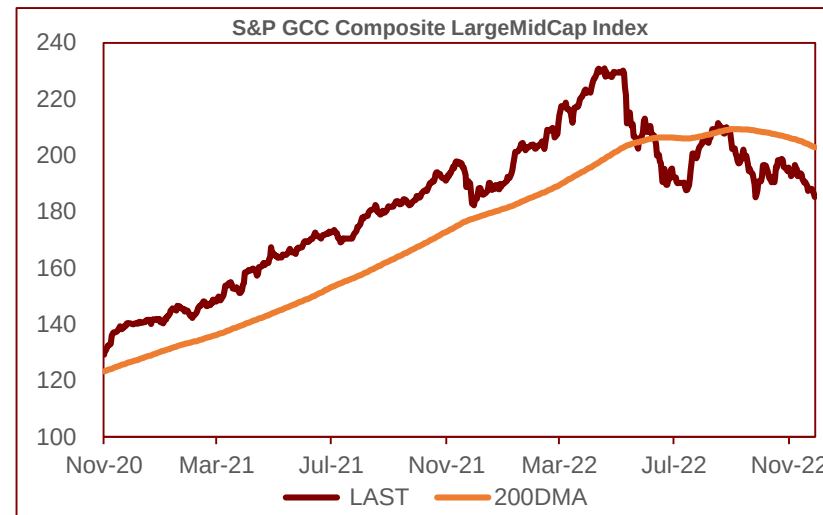




Market Watch

Thursday, December 22, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	10,215.79	-0.60	-0.73	-6.25	-10.43	-9.45	9,572 SAR	1.61	14.72
Qatar (QE Index)	10,988.84	-0.08	0.11	-7.86	-13.44	-5.48	563 QAR	1.32	12.98
Dubai (DFMGI)	3,316.12	-0.50	0.24	-0.03	-0.48	3.98	456 AED	1.21	13.20
Abu Dhabi (ADI)	10,306.28	-0.26	1.42	-2.27	5.77	21.50	1,435 AED	1.96	19.58
Bahrain (BAX)	1,851.79	-0.28	-0.12	-0.70	-1.60	3.03	19 BHD	1.70	15.13
MUSCAT SE INDEX	4,838.40	0.86	-0.37	4.87	6.85	17.17	5 OMR	0.99	13.25
SP GCC Comp LMC	176.33	-0.64	-0.38	-6.23	-7.55	-7.09			
SP UAE PRICE INDEX	139.10	-0.50	1.60	-3.87	0.28	-5.66			
Developed Markets									
MSCI World Index	2,605.19	-1.21	-1.58	-4.62	9.11	-19.69			
U.S. (S&P 500)	3,844.82	-1.45	-1.88	-6.32	6.60	-19.80			
U.K. (FTSE 100)	7,473.01	-0.37	0.58	-1.37	8.35	1.15			
Japan (Topix)	1,897.94	0.78	-3.33	-3.90	3.93	-4.22			
Emerging Markets									
MSCI EM Index	954.78	1.16	0.40	-0.85	10.08	-21.75			
China (SSE Composite)	3,045.87	-0.46	-3.60	-3.08	0.99	-16.08			
India (Sensex)	59,845.29	-0.39	-1.57	-3.60	5.92	4.42			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	7,209.33	0.05	-1.92	-4.95	1.46	2.36	46.64 KWD	2.09	28.83
Kuwait Premier Index	8,009.60	0.13	-2.04	-5.68	0.75	4.85	36.61 KWD	2.20	24.50
Kuwait Main Index	5,571.77	-0.24	-1.45	-1.93	4.37	-5.34	10.03 KWD	1.69	44.71
NIC 50	8,947.84	0.02	-2.05	-5.69	0.74	4.99	28.60 KWD	2.18	23.50
Kuwait Sector									
Banking	1,773.26	-0.12	-1.97	-4.91	1.72	9.27	29.86 KWD	1.35	25.50
Telecom	1,162.46	0.71	-2.59	-4.26	-0.08	6.71	3.57 KWD	1.98	11.77
Industrials	1,040.01	0.43	-2.86	-8.47	2.30	-8.89	3.67 KWD	0.78	18.51
Financial services	1,259.17	1.47	-1.14	-5.52	0.43	-11.53	3.57 KWD	0.73	16.65
Real estate	1,217.26	-0.60	-2.26	-5.02	1.26	-8.23	2.65 KWD	0.58	21.23
Basic materials	868.20	-0.65	0.19	-1.53	-3.68	-15.28	0.77 KWD	1.28	8.40
Health care	461.85	0.00	-0.39	1.67	0.46	-42.05	0.23 KWD	2.62	11.92
Consumer services	486.49	2.38	-0.50	-0.44	4.10	-33.46	0.76 KWD	0.92	11.47
Insurance	1,548.26	-0.03	0.42	0.29	3.14	0.97	0.64 KWD	0.80	9.43
Consumer Disc	1,468.93	-0.29	0.37	-0.69	6.05	9.90	0.15 KWD	0.98	0.00
Energy	1,125.52	-5.63	-1.96	3.12	5.43	-21.19	0.23 KWD	0.81	4.66
Technology	705.67	-4.90	3.30	-8.49	19.75	3.19	0.01 KWD	0.86	0.00
Utilities	481.58	-2.14	-2.66	-7.11	-6.15	-19.74	0.20 KWD	1.69	15.05



What Move the GCC markets

Oil Prices

Oil prices climbed for a fourth straight day on Thursday with U.S. crude, heating oil and jet fuel stocks growing tighter just as a wintry blast hits the United States. Brent crude futures gained \$1.42, or 1.7%, to trade at \$82.62.

Kuwait Market

The market closed up today by + 0.05% at 7,209.33 value traded 22.1 million KD, Premier market value traded reached 14.8 million KD up by + 0.13% at 8,009.60

KSA Market

The market closed down today by – 0.60% at 10,215.79.

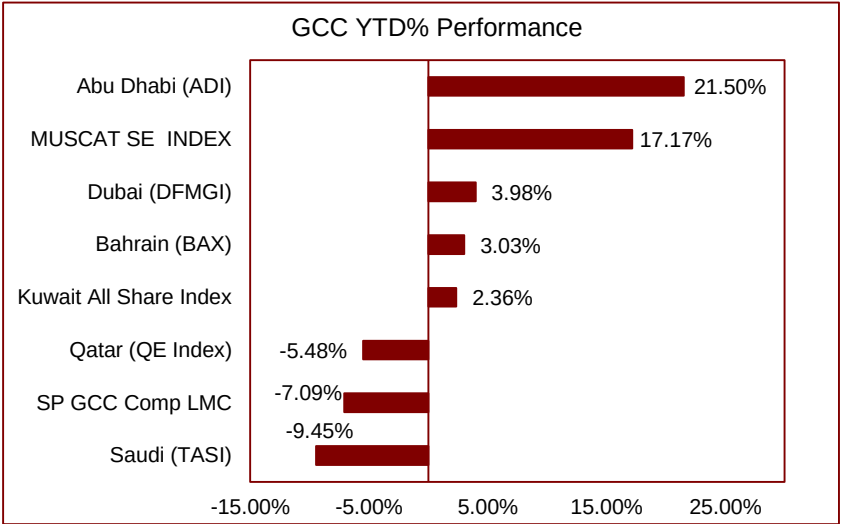


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.075	0.00	-1.10	-4.19	10.14	13.21	8.12 KWD	2.07	27.00
KFH	0.804	0.00	-2.90	-7.16	-4.40	6.30	10.79 KWD	3.32	32.00
Zain	0.550	0.36	-3.85	-6.30	-5.98	-7.56	2.38 KWD	1.98	11.77
BOUBYAN BANK	0.797	0.50	-2.33	-5.57	4.18	11.88	2.98 KWD	3.16	34.00
Agility	0.681	0.89	-5.02	-13.47	1.95	-13.52	1.82 KWD	1.26	44.51
Saudi Arabia									
ARAMCO	31.10	0.32	0.16	-7.16	-13.25	-4.44	6,842.00 SAR	4.93	11.85
SABIC	84.80	0.00	4.05	2.17	-4.50	-26.90	254.40 SAR	1.39	35.00
STC	35.65	-0.14	-1.79	-7.28	-9.40	-20.71	178.25 SAR	2.43	14.82
AL-RAJHI BANK	73.20	-2.01	-0.27	-9.07	-9.96	-17.40	292.80 SAR	3.40	19.65
NCB	48.50	-1.02	-1.92	-5.64	-23.14	-24.69	217.18 SAR	1.33	11.82
United Arab Emirates									
ETISALAT.AD	23.66	-0.59	1.55	-8.29	1.28	-25.36	206.63 AED	4.34	22.18
FAB.AD	17.50	0.57	6.71	-0.57	-2.02	-6.03	193.31 AED	1.72	13.90
EMIRATES NBD	13.10	-1.13	0.00	-1.13	1.95	-3.32	82.42 AED	0.93	7.82
DB ISLAMIC BK	5.60	-0.53	0.00	-1.41	-6.35	4.09	40.69 AED	1.00	8.18
EMAAR PROPERT	5.92	-0.50	1.20	-2.63	2.25	21.06	52.15 AED	0.74	6.82
Qatar									
QNB	18.09	-0.44	3.08	-7.70	-9.10	-10.40	167.09 QAR	1.59	12.95
INDUSTRIES QAT	13.18	0.92	-0.15	-11.48	-22.01	-14.91	79.74 QAR	1.97	8.40
QA ISLAMIC BK	20.28	-1.46	-1.89	-16.47	-17.89	10.64	47.92 QAR	1.82	13.01
MASRAF AL RAYA	3.29	1.55	3.07	-7.15	-20.27	-29.20	30.55 QAR	1.26	20.56
MESAIEED PETRO	2.18	-0.05	-1.36	-6.44	-7.23	4.31	27.39 QAR	1.60	14.46
OMAN									
BANK MUSCAT	0.284	-0.70	-3.07	1.43	-1.05	23.22	2.13 OMR	0.98	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	1.19	-2.86	9.68	19.72	34.92	0.51 QAR	0.72	14.93
NAT BANK OF OMAN	0.290	2.47	-1.36	0.69	7.41	47.21	0.47 QAR	0.81	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 up today by + 0.05 %The leading sector best performance indices today are Consumer services 2.38 % Financial services 1.47 % Telecom 0.71 % respectively

KSA
Saudi Armco has a positive performance today by + 0.32 %, SABIC flat performance today, STC has a negative performance today by -0.14 %, Al Rajhi Bank has a negative performance today by -2.01 %

U.A.E
ETISALAT .AD has a negative performance today by -0.59 %, FAB.AD has a positive performance today by + 0.57 %



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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