

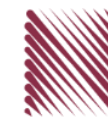


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, December 26th 2022





Market Watch

Monday, December 26, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,228.64	-0.06	0.13	-6.13	-10.32	-9.33	9,640 SAR	1.55	14.67
Qatar (QE Index)	10,784.60	-1.23	-1.86	-9.57	-15.05	-7.24	550 QAR	1.32	12.76
Dubai (DFMGI)	3,326.52	0.31	0.10	0.08	-0.38	4.09	457 AED	1.21	13.15
Abu Dhabi (ADI)	10,252.53	-0.52	-0.59	-2.84	5.15	20.78	1,435 AED	1.96	19.68
Bahrain (BAX)	1,858.07	-0.06	0.34	-0.37	-1.27	3.38	19 BHD	1.69	15.13
MUSCAT SE INDEX	4,831.15	0.01	-0.15	4.71	6.69	16.99	5 OMR	0.99	13.25
SP GCC Comp LMC	176.10	-0.14	-0.11	-6.34	-7.65	-7.19			
SP UAE PRICE INDEX	138.53	-0.41	-0.42	-4.27	-0.14	-6.06			

Developed Markets

MSCI World Index	2,605.48	0.01	0.39	-4.24	9.54	-19.38			
U.S. (S&P 500)	3,844.82	0.00	0.59	-5.77	7.23	-19.33			
U.K. (FTSE 100)	7,473.01	0.00	0.05	-1.32	8.40	1.20			
Japan (Topix)	1,902.52	0.24	-0.30	-4.18	3.63	-4.51			

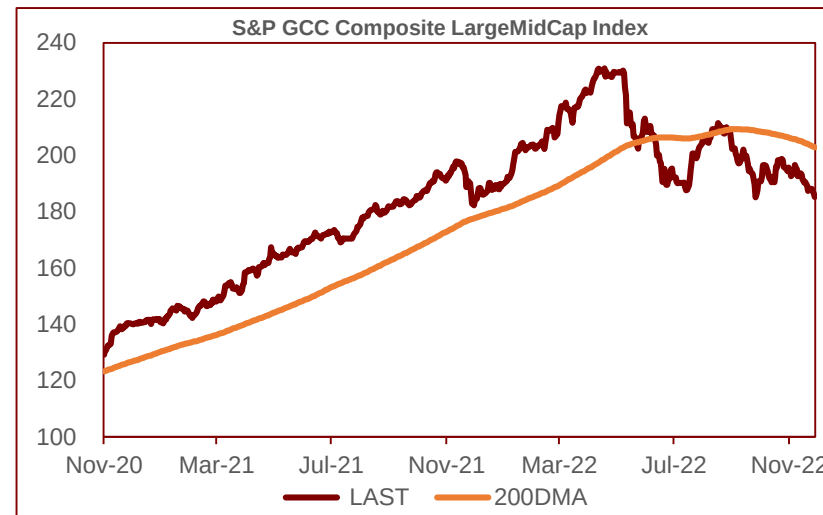
Emerging Markets

MSCI EM Index	956.48	0.18	-0.79	-1.63	9.21	-22.36			
China (SSE Composite)	3,065.56	0.65	0.36	-2.72	1.36	-15.78			
India (Sensex)	60,566.42	1.20	-0.43	-4.01	5.47	3.97			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,228.07	0.70	0.26	-4.70	1.72	2.63	46.79 KWD	2.10	28.78
Kuwait Premier Index	8,028.47	0.67	0.24	-5.46	0.99	5.10	36.71 KWD	2.20	24.57
Kuwait Main Index	5,591.64	0.79	0.36	-1.58	4.74	-5.01	10.08 KWD	1.71	44.21
NIC 50	8,971.96	0.72	0.23	-5.47	0.98	5.27	28.60 KWD	2.18	23.57

Kuwait Sector

Banking	1,779.28	0.73	0.34	-4.58	2.06	9.64	29.97 KWD	1.35	25.57
Telecom	1,171.75	0.90	0.80	-3.49	0.72	7.56	3.60 KWD	2.00	11.90
Industrials	1,043.32	0.74	0.32	-8.18	2.63	-8.60	3.68 KWD	0.75	18.49
Financial services	1,256.48	1.00	-0.21	-5.73	0.22	-11.72	3.57 KWD	0.75	16.72
Real estate	1,202.89	0.05	-1.18	-6.14	0.06	-9.31	2.62 KWD	0.57	21.05
Basic materials	868.07	0.09	-0.01	-1.54	-3.70	-15.29	0.77 KWD	1.28	8.40
Health care	461.85	0.00	0.00	1.67	0.46	-42.05	0.23 KWD	2.62	11.92
Consumer services	496.83	0.27	2.13	1.68	6.31	-32.04	0.78 KWD	0.94	11.37
Insurance	1,550.16	0.21	0.12	0.41	3.26	1.09	0.64 KWD	0.80	9.43
Consumer Disc	1,485.55	0.47	1.13	0.44	7.25	11.14	0.15 KWD	1.02	0.00
Energy	1,133.70	-0.22	0.73	3.87	6.20	-20.62	0.24 KWD	0.83	4.66
Technology	742.05	0.99	5.16	-3.77	25.93	8.51	0.01 KWD	0.91	0.00
Utilities	484.21	0.00	0.55	-6.60	-5.64	-19.30	0.20 KWD	1.70	15.13



What Move the GCC markets

Oil Prices

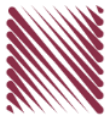
Oil prices rose in light trade on Monday on concerns that winter storms across the United States are affecting logistics and production of petroleum products and shale oil. Brent crude futures rose 0.6% to \$84.42 a barrel.

Kuwait Market

The market closed up today by + 0.70% at 7,228.07 value traded 26.9 million KD, Premier market value traded reached 20.1 million KD up by + 0.67% at 8,028.47

KSA Market

The market closed down today by - 0.06% at 10,228.64.



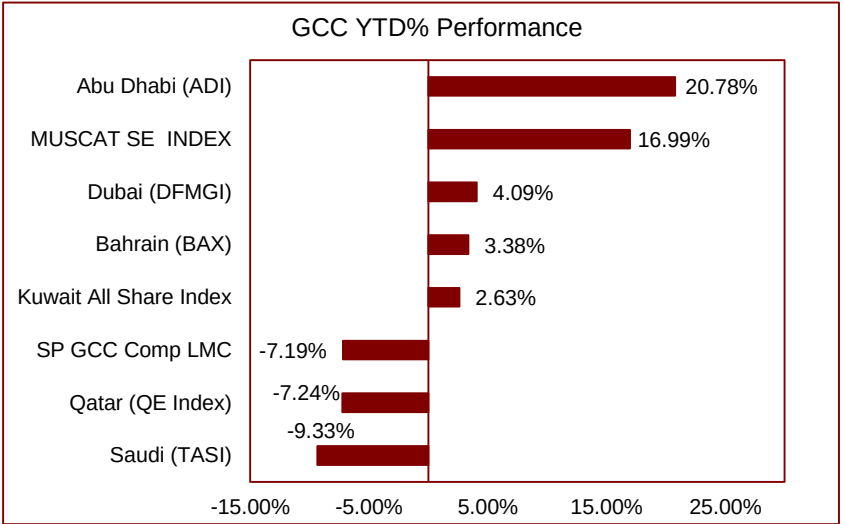
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.075	0.47	0.00	-4.19	10.14	13.21	8.12 KWD	2.07	27.00
KFH	0.807	0.75	0.37	-6.81	-4.04	6.69	10.84 KWD	3.33	32.00
Zain	0.556	1.46	1.09	-5.28	-4.96	-6.55	2.41 KWD	2.00	11.90
BOUBYAN BANK	0.800	0.76	0.38	-5.21	4.58	12.30	2.99 KWD	3.17	34.00
Agility	0.680	0.89	-0.15	-13.60	1.80	-13.65	1.82 KWD	1.26	44.44
Saudi Arabia									
ARAMCO	31.40	0.00	0.96	-6.27	-12.41	-3.52	6,910.76 SAR	4.97	12.00
SABIC	85.60	0.82	0.94	3.13	-3.60	-26.21	256.90 SAR	1.40	35.00
STC	35.65	0.00	0.00	-7.28	-9.40	-20.71	178.32 SAR	2.43	14.80
AL-RAJHI BANK	74.00	0.14	1.09	-8.07	-8.98	-16.50	296.12 SAR	3.44	19.44
NCB	48.70	0.00	0.41	-5.25	-22.82	-24.38	218.17 SAR	1.33	11.74
United Arab Emirates									
ETISALAT.AD	23.60	-0.67	-0.25	-8.53	1.03	-25.55	206.60 AED	5.10	21.10
FAB.AD	17.26	-1.37	-1.37	-1.93	-3.36	-7.32	190.69 AED	1.69	13.71
EMIRATES NBD	13.20	1.15	0.76	-0.38	2.72	-2.58	83.38 AED	0.94	7.88
DB ISLAMIC BK	5.69	1.25	1.61	0.18	-4.85	5.76	41.20 AED	1.02	8.31
EMAAR PROPERT	5.91	0.17	-0.17	-2.80	2.07	20.86	52.24 AED	0.74	6.81
Qatar									
QNB	18.00	-0.28	-0.50	-8.16	-9.55	-10.85	165.44 QAR	1.58	12.89
INDUSTRIES QAT	12.96	-1.37	-1.67	-12.96	-23.31	-16.33	78.02 QAR	1.94	8.26
QA ISLAMIC BK	19.56	-2.35	-3.55	-19.44	-20.81	6.71	45.99 QAR	1.75	12.55
MASRAF AL RAYA	3.24	-1.49	-1.40	-8.45	-21.38	-30.19	29.97 QAR	1.24	20.27
MESAIEED PETRO	2.13	-2.25	-2.25	-8.54	-9.32	1.96	26.64 QAR	1.56	14.13
OMAN									
BANK MUSCAT	0.280	0.00	-1.41	0.00	-2.44	21.49	2.11 OMR	0.97	8.33
OMANTEL	0.928	4.50	-0.85	6.42	5.45	23.40	0.70 OMR	1.18	7.69
BANK DHOFAR	0.172	0.58	1.18	10.97	21.13	36.51	0.52 QAR	0.73	14.93
NAT BANK OF OMAN	0.290	0.00	0.00	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 + 0.7 %The leading sector best performance indices today are Financial services I % Technology 0.99 % Telecom 0.9 % respectively

KSA

Saudi Armco flat performance today, SABIC has a positive performance today by + 0.82 %, STC has a flat performance today, Al Rajhi Bank has a positive performance today by + 0.14 %

U.A.E

ETISALAT .AD has a negative performance today by -0.67 %, FAB.AD has a negative performance today by -1.37 %



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