

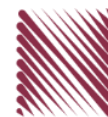


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, December 28th 2022

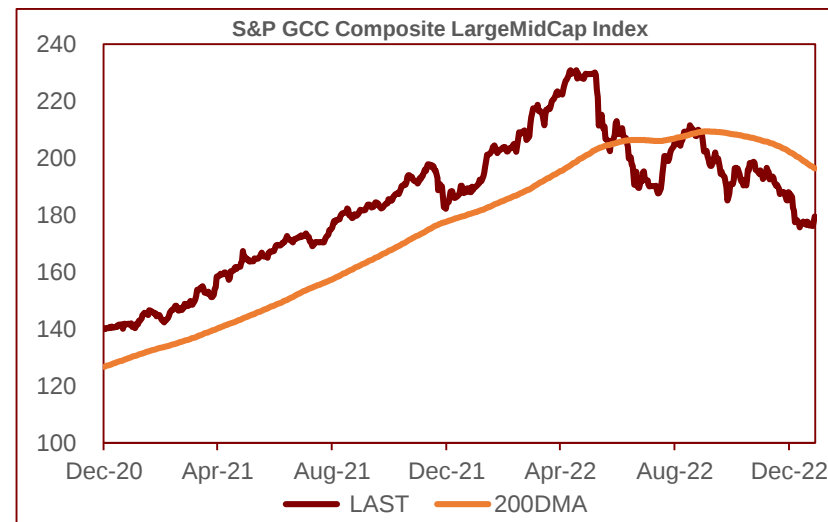




Market Watch

Wednesday, December 28, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,485.29	1.22	2.64	-3.78	-8.07	-7.06	9,885 SAR	1.58	14.84
Qatar (QE Index)	10,795.67	0.29	-1.76	-9.48	-14.96	-7.14	555 QAR	1.31	12.79
Dubai (DFMGI)	3,344.00	-0.11	0.63	0.60	0.15	4.63	459 AED	1.22	13.22
Abu Dhabi (ADI)	10,293.07	0.36	-0.19	-2.46	5.56	21.26	1,435 AED	1.97	20.05
Bahrain (BAX)	1,879.63	0.15	1.50	0.79	-0.13	4.58	19 BHD	1.63	15.15
MUSCAT SE INDEX	4,872.06	0.55	0.70	5.60	7.59	17.98	5 OMR	0.99	13.25
SP GCC Comp LMC	179.52	0.98	1.82	-4.53	-5.86	-5.40			
SP UAE PRICE INDEX	138.96	0.14	-0.11	-3.98	0.17	-5.77			
Developed Markets									
MSCI World Index	2,575.16	-0.99	-0.77	-5.36	8.26	-20.32			
U.S. (S&P 500)	3,783.22	-1.20	-1.02	-7.28	5.51	-20.62			
U.K. (FTSE 100)	7,497.19	0.32	0.37	-1.00	8.75	1.53			
Japan (Topix)	1,909.02	-0.06	0.04	-3.86	3.98	-4.18			
Emerging Markets									
MSCI EM Index	960.19	0.08	-0.40	-1.24	9.64	-22.06			
China (SSE Composite)	3,087.40	-0.26	1.08	-2.03	2.08	-15.18			
India (Sensex)	60,910.28	-0.03	0.14	-3.47	6.07	4.56			
Kuwait									
Kuwait All Share Index	7,307.59	0.37	1.36	-3.65	2.84	3.75	47.26 KWD	2.13	29.01
Kuwait Premier Index	8,136.19	0.49	1.58	-4.19	2.34	6.51	37.17 KWD	2.24	25.02
Kuwait Main Index	5,599.56	-0.08	0.50	-1.44	4.89	-4.87	10.09 KWD	1.71	43.76
NIC 50	9,102.75	0.53	1.57	-4.20	2.33	6.81	28.60 KWD	2.22	24.02
Kuwait Sector									
Banking	1,801.35	0.43	1.58	-3.40	3.33	11.00	30.31 KWD	1.38	26.02
Telecom	1,184.29	0.43	1.88	-2.46	1.80	8.71	3.63 KWD	2.03	12.09
Industrials	1,066.38	1.07	2.54	-6.15	4.90	-6.58	3.77 KWD	0.76	18.57
Financial services	1,260.40	-0.05	0.10	-5.43	0.53	-11.45	3.57 KWD	0.75	16.78
Real estate	1,207.61	-0.32	-0.79	-5.77	0.46	-8.96	2.62 KWD	0.58	21.10
Basic materials	868.88	0.56	0.08	-1.45	-3.61	-15.21	0.77 KWD	1.28	8.42
Health care	461.85	0.00	0.00	1.67	0.46	-42.05	0.23 KWD	2.62	11.92
Consumer services	493.73	-0.83	1.49	1.04	5.65	-32.47	0.77 KWD	0.91	11.38
Insurance	1,548.67	0.00	0.03	0.31	3.17	1.00	0.64 KWD	0.80	9.43
Consumer Disc	1,484.29	-0.16	1.05	0.35	7.15	11.05	0.15 KWD	1.01	0.00
Energy	1,131.42	-0.39	0.52	3.66	5.98	-20.78	0.24 KWD	0.82	4.66
Technology	771.15	0.00	9.28	0.00	30.87	12.77	0.01 KWD	0.94	0.00
Utilities	489.47	0.54	1.64	-5.58	-4.62	-18.42	0.20 KWD	1.72	15.30



What Move the GCC markets

Oil Prices

Oil prices climbed on Wednesday as markets were optimistic about fuel demand recovery as China continues to ease its Covid restrictions. Brent futures for February delivery rose 31 cents to \$84.64 a barrel, a 0.4% gain.

Kuwait Market

The market closed up today by + 0.37% at 7,307.59 value traded 29.2 million KD, Premier market value traded reached 21.2 million KD up by + 0.49% at 8,136.19

KSA Market

The market closed up today by + 1.22% at 10,485.29.



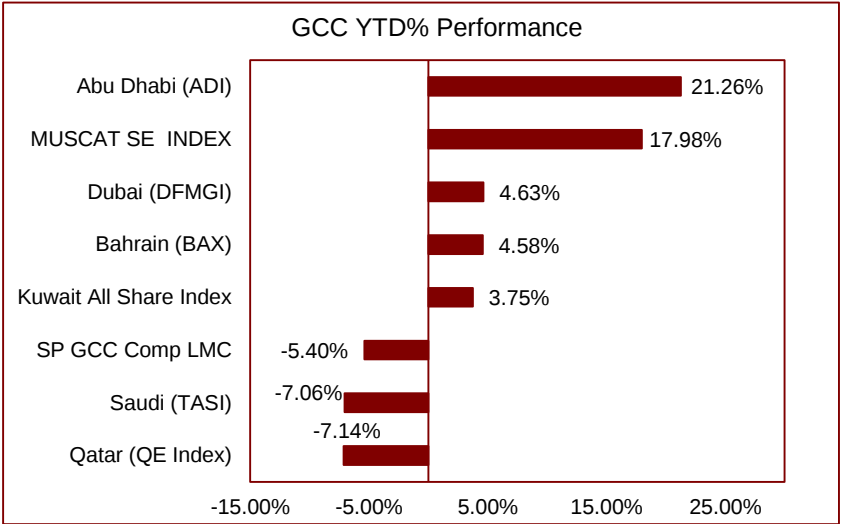
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.083	0.09	0.74	-3.48	10.96	14.06	8.17 KWD	2.08	27.00
KFH	0.823	0.73	2.36	-4.97	-2.14	8.81	11.04 KWD	3.39	32.00
Zain	0.565	0.53	2.73	-3.75	-3.42	-5.04	2.44 KWD	2.03	12.09
BOUBYAN BANK	0.809	0.62	1.51	-4.15	5.75	13.57	3.02 KWD	3.21	34.00
Agility	0.711	2.75	4.41	-9.66	6.44	-9.71	1.90 KWD	1.31	46.47
Saudi Arabia									
ARAMCO	32.20	0.63	3.54	-3.88	-10.18	-1.06	7,084.94 SAR	5.10	12.23
SABIC	89.50	2.87	5.54	7.83	0.79	-22.84	268.54 SAR	1.47	35.00
STC	36.50	1.39	2.38	-5.07	-7.24	-18.82	182.52 SAR	2.48	14.95
AL-RAJHI BANK	76.00	0.93	3.83	-5.59	-6.52	-14.25	304.04 SAR	3.53	19.80
NCB	49.90	1.22	2.89	-2.92	-20.92	-22.52	223.48 SAR	1.36	11.89
United Arab Emirates									
ETISALAT.AD	23.46	-0.34	-0.85	-9.07	0.43	-25.99	206.60 AED	5.10	21.10
FAB.AD	17.50	1.63	0.00	-0.57	-2.02	-6.03	193.33 AED	1.72	13.90
EMIRATES NBD	13.00	-2.62	-0.76	-1.89	1.17	-4.06	82.11 AED	0.93	7.76
DB ISLAMIC BK	5.78	0.52	3.21	1.76	-3.34	7.43	41.85 AED	1.03	8.44
EMAAR PROPERT	5.85	-0.68	-1.18	-3.78	1.04	19.63	51.71 AED	0.73	6.74
Qatar									
QNB	18.20	0.05	0.61	-7.14	-8.54	-9.86	168.10 QAR	1.60	13.03
INDUSTRIES QAT	13.08	1.71	-0.76	-12.16	-22.60	-15.56	79.13 QAR	1.95	8.33
QA ISLAMIC BK	18.68	-2.76	-7.89	-23.06	-24.37	1.91	44.14 QAR	1.68	11.98
MASRAF AL RAYA	3.22	0.63	-2.13	-9.13	-21.97	-30.71	29.90 QAR	1.24	20.12
MESAIEED PETRO	2.15	1.32	-1.61	-7.94	-8.72	2.63	26.95 QAR	1.57	14.22
OMAN									
BANK MUSCAT	0.280	0.00	-1.41	0.00	-2.44	21.49	2.10 OMR	0.97	8.33
OMANTEL	0.920	3.60	-1.71	5.50	4.55	22.34	0.69 OMR	1.17	7.69
BANK DHOFAR	0.175	2.34	2.94	12.90	23.24	38.89	0.52 QAR	0.74	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 + 0.37 %The leading sector best performance indices today are Industrials 1.07 % Basic materials 0.56 % Utilities 0.54 % respectively

KSA

Saudi Armco has a positive performance today by + 0.63 %, SABIC has a positive performance today by + 2.87 %, STC has a positive performance today by + 1.39 %, Al Rajhi Bank has a positive performance today by + 0.93 %

U.A.E

ETISALAT .AD has a negative performance today by -0.34 %, FAB.AD has a positive performance today by + 1.63 %



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