



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, December 29th 2022





Market Watch

Thursday, December 29, 2022

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,546.67	-0.07	2.57	-3.84	-8.13	-7.12	9,968 SAR	1.63	14.83
Qatar (QE Index)	10,681.07	-1.06	-2.80	-10.44	-15.87	-8.13	549 QAR	1.30	12.76
Dubai (DFMGI)	3,336.07	-0.45	0.17	0.15	-0.31	4.16	458 AED	1.22	13.13
Abu Dhabi (ADI)	10,211.09	-0.25	-0.45	-2.70	5.29	20.95	1,435 AED	1.99	19.89
Bahrain (BAX)	1,895.27	0.83	2.35	1.63	0.71	5.45	19 BHD	1.63	15.12
MUSCAT SE INDEX	4,872.67	-0.30	0.39	5.28	7.27	17.63	5 OMR	1.00	13.25
SP GCC Comp LMC	179.38	-0.31	1.51	-4.82	-6.15	-5.69			
SP UAE PRICE INDEX	137.50	-0.41	-0.53	-4.37	-0.24	-6.16			

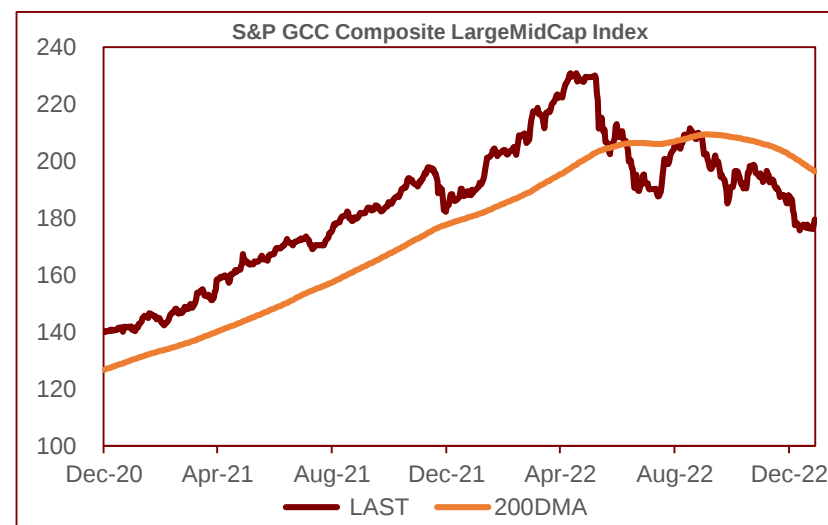
Developed Markets

MSCI World Index	2,602.69	1.43	0.64	-4.00	9.81	-19.18			
U.S. (S&P 500)	3,839.50	1.75	0.70	-5.66	7.35	-19.24			
U.K. (FTSE 100)	7,451.74	0.21	0.58	-0.80	8.98	1.74			
Japan (Topix)	1,891.71	-0.72	-0.68	-4.55	3.23	-4.87			

Emerging Markets

MSCI EM Index	956.38	-0.29	-0.69	-1.53	9.32	-22.29			
China (SSE Composite)	3,089.26	-0.44	0.63	-2.46	1.63	-15.55			
India (Sensex)	60,840.74	0.37	0.51	-3.12	6.46	4.94			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,292.12	-0.21	1.15	-3.86	2.62	3.53	47.18 KWD	2.13	28.76
Kuwait Premier Index	8,115.68	-0.25	1.32	-4.43	2.09	6.24	37.09 KWD	2.24	24.95
Kuwait Main Index	5,596.79	-0.05	0.45	-1.49	4.84	-4.92	10.09 KWD	1.71	42.84
NIC 50	9,083.78	-0.21	1.31	-4.44	2.08	6.59	28.60 KWD	2.22	23.95
Kuwait Sector									
Banking	1,793.91	-0.41	1.16	-3.80	2.90	10.55	30.21 KWD	1.36	25.95
Telecom	1,181.46	-0.24	1.63	-2.69	1.55	8.45	3.62 KWD	2.03	12.05
Industrials	1,078.88	1.17	3.74	-5.05	6.13	-5.48	3.81 KWD	0.80	18.98
Financial services	1,257.24	-0.25	-0.15	-5.67	0.28	-11.67	3.56 KWD	0.75	16.71
Real estate	1,208.71	0.09	-0.70	-5.69	0.55	-8.87	2.63 KWD	0.60	21.20
Basic materials	865.11	-0.43	-0.36	-1.88	-4.02	-15.58	0.77 KWD	1.28	8.37
Health care	461.85	0.00	0.00	1.67	0.46	-42.05	0.23 KWD	2.62	11.92
Consumer services	479.95	-2.79	-1.34	-1.78	2.70	-34.35	0.78 KWD	0.92	11.24
Insurance	1,550.82	0.14	0.17	0.45	3.31	1.14	0.64 KWD	0.80	9.43
Consumer Disc	1,486.83	0.17	1.22	0.52	7.34	11.24	0.15 KWD	0.96	0.00
Energy	1,138.52	0.63	1.16	4.31	6.65	-20.28	0.24 KWD	0.84	4.66
Technology	696.22	-9.72	-1.34	-9.72	18.15	1.81	0.01 KWD	0.85	0.00
Utilities	494.74	1.08	2.73	-4.57	-3.59	-17.54	0.21 KWD	1.74	15.46



What Move the GCC markets

Oil Prices

Oil prices ticked down on Thursday as surging Covid cases in China dimmed hopes of a recovery in fuel demand in the world's second-biggest oil consumer. Brent futures for February delivery fell 42 cents, or 0.5%, to \$82.84 a barrel .

Kuwait Market

The market closed down today by - 0.21% at 7,292.12 value traded 43.5 million KD, Premier market value traded reached 32.0 million KD down by - 0.25% at 8,115.68

KSA Market

The market closed down today by - 0.07% at 10,546.67.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



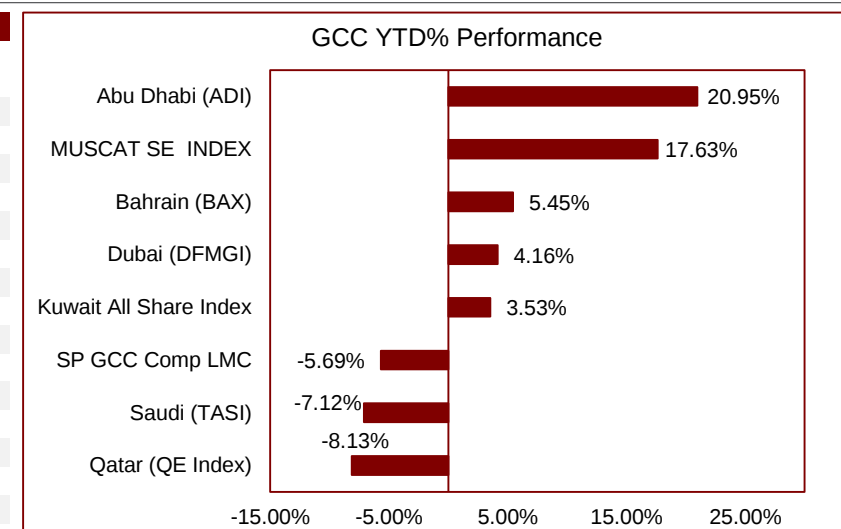
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.078	-0.46	0.28	-3.92	10.45	13.53	8.14 KWD	2.07	27.00
KFH	0.823	0.00	2.36	-4.97	-2.14	8.81	11.05 KWD	3.39	32.00
Zain	0.563	-0.35	2.36	-4.09	-3.76	-5.38	2.44 KWD	2.03	12.05
BOUBYAN BANK	0.798	-1.36	0.13	-5.45	4.31	12.02	2.98 KWD	3.16	34.00
Agility	0.720	1.27	5.73	-8.51	7.78	-8.57	1.93 KWD	1.33	47.06
Saudi Arabia									
ARAMCO	32.10	-0.31	3.22	-4.18	-10.46	-1.37	7,130.85 SAR	5.13	12.27
SABIC	89.40	-0.11	5.42	7.71	0.68	-22.93	270.11 SAR	1.48	35.00
STC	36.60	0.27	2.66	-4.81	-6.99	-18.59	186.07 SAR	2.53	15.19
AL-RAJHI BANK	75.20	-1.05	2.73	-6.58	-7.50	-15.15	302.12 SAR	3.51	19.78
NCB	50.50	1.20	4.12	-1.75	-19.97	-21.58	227.13 SAR	1.39	12.18
United Arab Emirates									
ETISALAT.AD	23.14	-1.36	-2.20	-10.31	-0.94	-27.00	206.60 AED	5.10	21.10
FAB.AD	17.48	-0.11	-0.11	-0.68	-2.13	-6.13	188.91 AED	1.68	13.59
EMIRATES NBD	13.00	0.00	-0.76	-1.89	1.17	-4.06	82.12 AED	0.93	7.76
DB ISLAMIC BK	5.71	-1.21	1.96	0.53	-4.52	6.13	41.27 AED	1.02	8.32
EMAAR PROPERT	5.86	0.17	-1.01	-3.62	1.21	19.84	51.80 AED	0.74	6.75
Qatar									
QNB	18.00	-1.10	-0.50	-8.16	-9.55	-10.85	166.26 QAR	1.58	12.89
INDUSTRIES QAT	12.81	-2.06	-2.81	-13.97	-24.20	-17.30	77.50 QAR	1.91	8.16
QA ISLAMIC BK	18.56	-0.64	-8.48	-23.56	-24.86	1.25	43.86 QAR	1.66	11.90
MASRAF AL RAYA	3.17	-1.37	-3.47	-10.37	-23.03	-31.66	29.49 QAR	1.22	19.84
MESAIEED PETRO	2.13	-0.84	-2.43	-8.71	-9.49	1.77	26.72 QAR	1.56	14.10
OMAN									
BANK MUSCAT	0.275	-1.79	-3.17	-1.79	-4.18	19.32	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	0.00	2.94	12.90	23.24	38.89	0.52 QAR	0.74	14.93
NAT BANK OF OMAN	0.289	-0.34	-0.34	0.35	7.04	46.70	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
21-Dec 22	24.69%	17.25%	0.06%	1.23%	0.37%	4.51%	17.73%	12.30%	5.91%	4.98%
28-Dec 22	24.72%	17.24%	0.06%	1.25%	0.37%	4.53%	17.68%	12.30%	5.91%	5.08%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.21 % The leading sector bottom performance indices today are Technology -9.72 % Consumer services -2.79 % Basic materials -0.43 % respectively

KSA

Saudi Armco has a negative performance today by -0.31 %, SABIC has a negative performance today by -0.11 %, STC has a positive performance today by + 0.27 %, Al Rajhi Bank has a negative performance today by -1.05 %

U.A.E

ETISALAT .AD has a negative performance today by -1.36 %, FAB.AD has a negative performance today by -0.11 %



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