

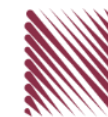


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, January 2nd 2023





Market Watch

Monday, January 2, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,578.34	0.95	0.95	0.95	-6.23	-6.23	9,922 SAR	1.64	15.02
Qatar (QE Index)	10,834.40	1.44	1.44	1.44	-6.81	-6.81	552 QAR	1.30	12.75
Dubai (DFMGI)	3,330.90	0.06	0.06	-0.15	4.22	4.22	456 AED	1.22	13.12
Abu Dhabi (ADI)	10,252.72	-0.14	-0.14	0.41	20.79	20.79	1,435 AED	1.99	19.90
Bahrain (BAX)	1,888.01	-0.38	-0.38	-0.38	5.05	5.05	19 BHD	1.63	15.10
MUSCAT SE INDEX	4,842.39	-0.31	-0.31	-0.31	17.26	17.26	5 OMR	0.99	13.25
SP GCC Comp LMC	179.72	0.42	0.42	0.19	-5.29	-5.29			
SP UAE PRICE INDEX	138.20	-0.13	-0.13	0.51	-6.28	-6.28			

Developed Markets

MSCI World Index	2,607.25	-0.18	-0.18	0.18	-19.32	-19.32			
U.S. (S&P 500)	3,839.50	-0.25	-0.25	0.00	-19.44	-19.44			
U.K. (FTSE 100)	7,451.74	-0.81	-0.81	0.00	0.91	0.91			
Japan (Topix)	1,891.71	-0.19	-0.19	0.00	-5.05	-5.05			

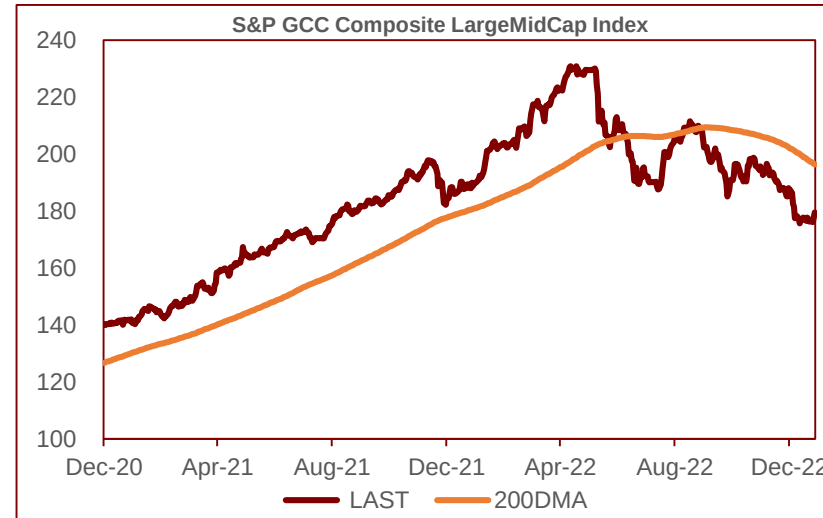
Emerging Markets

MSCI EM Index	956.12	-0.14	-0.14	-0.03	-22.39	-22.39			
China (SSE Composite)	3,089.26	0.51	0.51	0.00	-15.13	-15.13			
India (Sensex)	61,167.79	0.06	0.06	0.54	5.00	5.00			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,162.36	-1.78	-1.78	-1.78	1.69	1.69	46.36 KWD	2.07	28.58
Kuwait Premier Index	7,945.44	-2.10	-2.10	-2.10	4.01	4.01	36.35 KWD	2.18	24.33
Kuwait Main Index	5,568.57	-0.50	-0.50	-0.50	-5.40	-5.40	10.00 KWD	1.63	44.11
NIC 50	8,934.54	-1.64	-2.11	-2.11	4.00	4.84	28.60 KWD	2.16	23.33

Kuwait Sector

Banking	1,762.09	-1.77	-1.77	-1.77	8.59	8.59	29.68 KWD	1.32	25.33
Telecom	1,168.31	-1.11	-1.11	-1.11	7.25	7.25	3.59 KWD	2.00	11.90
Industrials	1,046.86	-2.97	-2.97	-2.97	-8.29	-8.29	3.70 KWD	0.79	18.56
Financial services	1,236.68	-1.64	-1.64	-1.64	-13.11	-13.11	3.51 KWD	0.74	16.63
Real estate	1,189.98	-1.55	-1.55	-1.55	-10.29	-10.29	2.59 KWD	0.59	20.96
Basic materials	856.61	-0.98	-0.98	-0.98	-16.41	-16.41	0.76 KWD	1.28	8.28
Health care	461.85	0.00	0.00	0.00	-42.05	-42.05	0.23 KWD	2.62	11.92
Consumer services	471.36	-1.79	-1.79	-1.79	-35.53	-35.53	0.74 KWD	0.94	11.50
Insurance	1,553.29	0.16	0.16	0.16	1.30	1.30	0.64 KWD	0.81	9.43
Consumer Disc	1,422.14	-4.35	-4.35	-4.35	6.40	6.40	0.14 KWD	0.94	0.00
Energy	1,177.62	3.43	3.43	3.43	-17.54	-17.54	0.25 KWD	0.84	4.70
Technology	734.77	5.54	5.54	5.54	7.45	7.45	0.01 KWD	0.90	0.00
Utilities	484.21	-2.13	-2.13	-2.13	-19.30	-19.30	0.20 KWD	1.70	15.13



What Move the GCC markets

Oil Prices

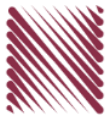
Oil prices swung wildly in 2022, climbing on tight supplies amid the war in Ukraine, then sliding on weaker demand from top importer China and worries of an economic contraction, but closed the year on Friday with a second straight annual gain. Brent crude on Friday, the last trading day of the year, settled at \$85.91 a barrel, up nearly 3% to \$2.45 per barrel.

Kuwait Market

The market closed down today by – 1.78% at 7,162.36 value traded 40.2 million KD, Premier market value traded reached 33.1 million KD down by – 2.10% at 7,945.44

KSA Market

The market closed up today by + 0.95% at 10,578.34.



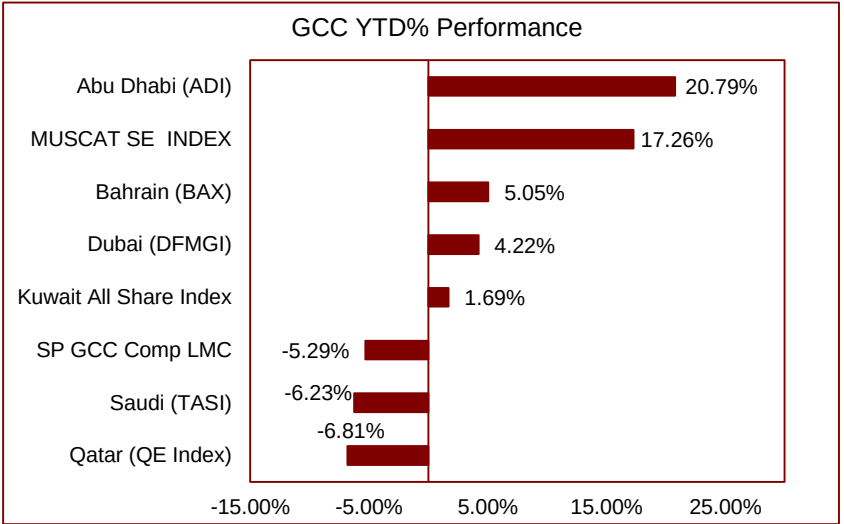
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.064	-1.30	-1.30	-1.30	12.06	12.06	8.04 KWD	2.04	27.00
KFH	0.800	-2.79	-2.79	-2.79	5.77	5.77	10.74 KWD	3.30	32.00
Zain	0.556	-1.24	-1.24	-1.24	-6.55	-6.55	2.41 KWD	2.00	11.90
BOUBYAN BANK	0.781	-2.13	-2.13	-2.13	9.64	9.64	2.92 KWD	3.10	34.00
Agility	0.685	-4.86	-4.86	-4.86	-13.02	-13.02	1.83 KWD	1.27	44.77
Saudi Arabia									
ARAMCO	32.15	0.16	0.16	0.16	-1.22	-1.22	7,073.00 SAR	5.09	12.38
SABIC	90.00	0.67	0.67	0.67	-22.41	-22.41	270.00 SAR	1.48	35.00
STC	37.50	2.46	2.46	2.46	-16.59	-16.59	187.50 SAR	2.55	15.44
AL-RAJHI BANK	76.20	1.33	1.33	1.33	-14.02	-14.02	304.80 SAR	3.54	19.86
NCB	50.40	-0.20	-0.20	-0.20	-21.74	-21.74	225.69 SAR	1.38	12.23
United Arab Emirates									
ETISALAT.AD	23.10	-0.17	-0.17	1.05	-27.13	-27.13	206.60 AED	5.10	21.10
FAB.AD	17.20	-1.60	-1.60	0.58	-7.64	-7.64	190.02 AED	1.69	13.67
EMIRATES NBD	13.00	0.00	0.00	0.00	-4.06	-4.06	82.12 AED	0.93	7.76
DB ISLAMIC BK	5.70	-0.18	-0.18	0.00	5.95	5.95	41.27 AED	1.02	8.32
EMAAR PROPERT	5.90	0.68	0.68	0.68	20.65	20.65	52.15 AED	0.74	6.79
Qatar									
QNB	18.29	1.61	1.61	1.61	-9.41	-9.41	167.73 QAR	1.61	13.10
INDUSTRIES QAT	13.03	1.72	1.72	1.72	-15.88	-15.88	78.27 QAR	1.95	8.30
QA ISLAMIC BK	19.30	3.99	3.99	3.99	5.29	5.29	45.28 QAR	1.73	12.38
MASRAF AL RAYA	3.21	1.23	1.23	1.23	-30.82	-30.82	29.64 QAR	1.23	20.09
MESAIEED PETRO	2.09	-1.65	-1.65	-1.65	0.10	0.10	26.09 QAR	1.53	13.87
OMAN									
BANK MUSCAT	0.276	0.36	0.36	0.36	19.75	19.75	2.08 OMR	0.95	8.33
OMANTEL	0.920	3.60	0.00	0.00	22.34	22.34	0.69 OMR	1.17	7.69
BANK DHOFAR	0.172	-1.71	-1.71	-1.71	36.51	36.51	0.52 QAR	0.73	14.93
NAT BANK OF OMAN	0.285	-1.38	-1.38	-1.38	44.67	44.67	0.46 QAR	0.80	12.71
OMINVEST	0.430	2.38	2.38	2.38	40.52	40.52	0.29 QAR	0.86	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 -1.78 %The leading sector bottom performance indices today are Consumer Disc -4.35 % Industrials -2.97 % Utilities -2.13 % respectively

KSA

Saudi Armco has a positive performance today by + 0.16 %, SABIC has a positive performance today by + 0.67 %, STC has a positive performance today by + 2.46 %, Al Rajhi Bank has a positive performance today by + 1.33 %

U.A.E

ETISALAT .AD has a negative performance today by -0.17 %, FAB.AD has a negative performance today by -1.6 %



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