

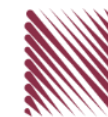


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, January 3rd 2023





Market Watch

Tuesday, January 3, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,660.94	0.78	1.74	1.74	-5.50	-5.50	9,958 SAR	1.68	15.08
Qatar (QE Index)	10,913.00	0.73	2.17	2.17	-6.13	-6.13	563 QAR	1.30	12.89
Dubai (DFMGI)	3,328.68	-0.07	0.00	-0.22	4.15	4.15	479 AED	1.22	13.15
Abu Dhabi (ADI)	10,287.82	0.34	0.20	0.75	21.20	21.20	1,435 AED	2.00	19.94
Bahrain (BAX)	1,886.98	-0.05	-0.44	-0.44	4.99	4.99	19 BHD	1.63	15.09
MUSCAT SE INDEX	4,871.30	0.60	0.29	0.29	17.96	17.96	5 OMR	0.99	13.25
SP GCC Comp LMC	180.80	0.60	1.02	1.13	-4.72	-4.72			
SP UAE PRICE INDEX	138.80	0.44	0.30	0.95	-5.88	-5.88			

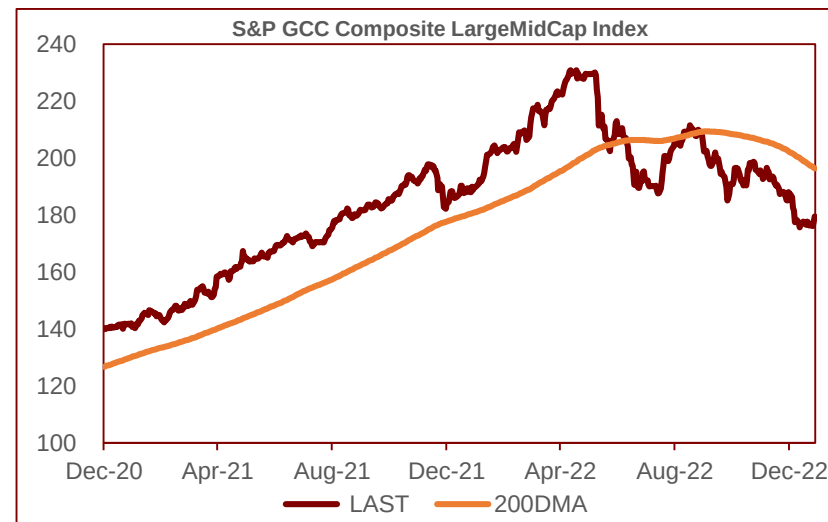
Developed Markets

MSCI World Index	2,600.91	-0.24	-0.42	-0.07	-19.52	-19.52			
U.S. (S&P 500)	3,824.14	-0.40	-0.65	-0.40	-19.77	-19.77			
U.K. (FTSE 100)	7,554.09	1.37	0.55	1.37	2.30	2.30			
Japan (Topix)	1,891.71	0.00	-0.19	0.00	-5.05	-5.05			

Emerging Markets

MSCI EM Index	962.57	0.68	0.54	0.65	-21.87	-21.87			
China (SSE Composite)	3,116.51	0.88	1.39	0.88	-14.38	-14.38			
India (Sensex)	61,294.20	0.21	0.26	0.75	5.22	5.22			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,134.16	-0.39	-2.17	-2.17	1.29	1.29	46.22 KWD	2.05	28.31
Kuwait Premier Index	7,914.81	-0.39	-2.48	-2.48	3.61	3.61	36.26 KWD	2.16	24.19
Kuwait Main Index	5,544.82	-0.43	-0.93	-0.93	-5.80	-5.80	9.96 KWD	1.62	43.39
NIC 50	8,859.45	-0.84	-2.49	-2.49	3.60	3.95	28.60 KWD	2.14	23.19
Kuwait Sector									
Banking	1,754.75	-0.42	-2.18	-2.18	8.13	8.13	29.58 KWD	1.31	25.19
Telecom	1,164.88	-0.29	-1.40	-1.40	6.93	6.93	3.58 KWD	2.00	11.92
Industrials	1,045.47	-0.13	-3.10	-3.10	-8.41	-8.41	3.70 KWD	0.80	18.33
Financial services	1,230.75	-0.48	-2.11	-2.11	-13.53	-13.53	3.49 KWD	0.72	16.45
Real estate	1,186.47	-0.29	-1.84	-1.84	-10.55	-10.55	2.58 KWD	0.58	20.73
Basic materials	855.66	-0.11	-1.09	-1.09	-16.50	-16.50	0.76 KWD	1.28	8.27
Health care	461.85	0.00	0.00	0.00	-42.05	-42.05	0.23 KWD	2.62	11.92
Consumer services	472.05	0.15	-1.65	-1.65	-35.43	-35.43	0.73 KWD	0.95	11.52
Insurance	1,546.84	-0.42	-0.26	-0.26	0.88	0.88	0.64 KWD	0.79	9.43
Consumer Disc	1,407.84	-1.01	-5.31	-5.31	5.33	5.33	0.14 KWD	0.94	0.00
Energy	1,155.30	-1.90	1.47	1.47	-19.11	-19.11	0.24 KWD	0.84	4.70
Technology	749.32	1.98	7.63	7.63	9.57	9.57	0.01 KWD	0.92	0.00
Utilities	484.21	0.00	-2.13	-2.13	-19.30	-19.30	0.20 KWD	1.70	15.13



What Move the GCC markets

Oil Prices

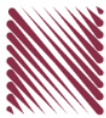
Oil prices slid on Tuesday from their highest levels in a month on a stronger dollar and after the head of the International Monetary Fund warned of a tougher 2023 as major economies experience weakening activity. Brent crude futures dropped 69 cents, or 0.8%, to \$85.22 a barrel

Kuwait Market

The market closed down today by – 0.39% at 7,134.16 value traded 46.3 million KD, Premier market value traded reached 38.5 million KD down by – 0.39% at 7,914.81

KSA Market

The market closed up today by + 0.78% at 10,660.94.



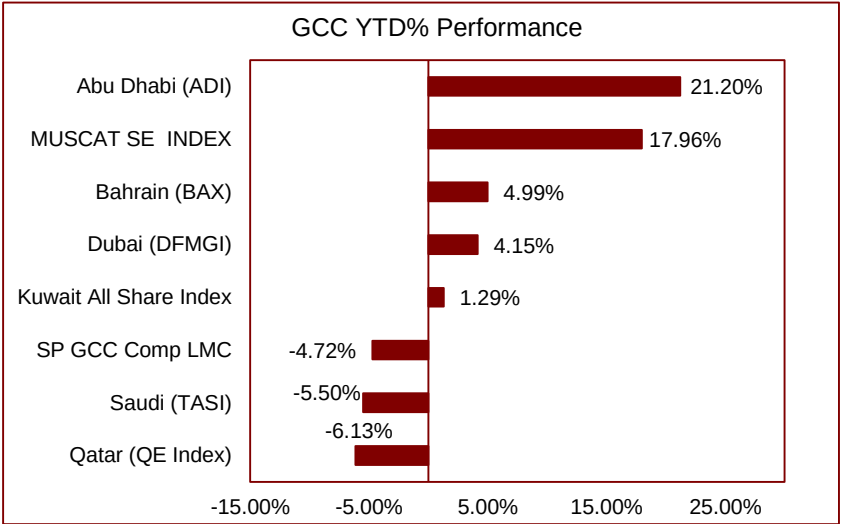
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.070	0.56	-0.74	-0.74	12.69	12.69	8.09 KWD	2.06	27.00
KFH	0.791	-1.13	-3.89	-3.89	4.58	4.58	10.63 KWD	3.26	32.00
Zain	0.557	0.18	-1.07	-1.07	-6.39	-6.39	2.41 KWD	2.00	11.92
BOUBYAN BANK	0.771	-1.28	-3.38	-3.38	8.23	8.23	2.89 KWD	3.06	34.00
Agility	0.690	0.73	-4.17	-4.17	-12.38	-12.38	1.85 KWD	1.28	45.10
Saudi Arabia									
ARAMCO	32.20	0.16	0.31	0.31	-1.06	-1.06	7,085.51 SAR	5.10	12.29
SABIC	90.60	0.67	1.34	1.34	-21.90	-21.90	271.86 SAR	1.49	35.00
STC	37.75	0.67	3.14	3.14	-16.04	-16.04	188.79 SAR	2.57	15.57
AL-RAJHI BANK	77.30	1.44	2.79	2.79	-12.78	-12.78	309.27 SAR	3.59	20.04
NCB	51.00	1.19	0.99	0.99	-20.81	-20.81	228.43 SAR	1.39	12.15
United Arab Emirates									
ETISALAT.AD	23.22	0.52	0.35	1.57	-26.75	-26.75	206.60 AED	5.10	21.10
FAB.AD	17.28	0.47	-1.14	1.05	-7.21	-7.21	190.92 AED	1.70	13.73
EMIRATES NBD	13.00	0.00	0.00	0.00	-4.06	-4.06	82.12 AED	0.93	7.76
DB ISLAMIC BK	5.62	-1.40	-1.58	-1.40	4.46	4.46	40.70 AED	1.00	8.20
EMAAR PROPERT	5.94	0.68	1.37	1.37	21.47	21.47	52.51 AED	0.75	6.84
Qatar									
QNB	18.21	-0.44	1.17	1.17	-9.81	-9.81	169.42 QAR	1.60	13.04
INDUSTRIES QAT	13.48	3.45	5.23	5.23	-12.98	-12.98	82.15 QAR	2.01	8.59
QA ISLAMIC BK	19.85	2.85	6.95	6.95	8.29	8.29	47.25 QAR	1.78	12.73
MASRAF AL RAYA	3.26	1.68	2.93	2.93	-29.66	-29.66	30.58 QAR	1.25	20.43
MESAIEED PETRO	2.08	-0.57	-2.21	-2.21	-0.48	-0.48	26.32 QAR	1.52	13.79
OMAN									
BANK MUSCAT	0.279	1.09	1.45	1.45	21.05	21.05	2.09 OMR	0.96	8.33
OMANTEL	0.928	4.50	0.87	0.87	23.40	23.40	0.70 OMR	1.18	7.69
BANK DHOFAR	0.175	1.74	0.00	0.00	38.89	38.89	0.52 QAR	0.74	14.93
NAT BANK OF OMAN	0.285	0.00	-1.38	-1.38	44.67	44.67	0.46 QAR	0.80	12.71
OMINVEST	0.430	0.00	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 -0.39 %The leading sector bottom performance indices today are Energy -1.9 % Consumer Disc -1.01 % Financial services -0.48 % respectively

KSA

Saudi Armco has a positive performance today by + 0.16 %, SABIC have positive performance today by + 0.66 %, STC has a positive performance today by + 0.67 %, Al Rajhi Bank has a positive performance today by + 1.44 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.52 %, FAB.AD has a positive performance today by + 0.47 %



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