



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, January 4th 2023





Market Watch

Wednesday, January 4, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,531.90	-1.21	0.51	0.51	-6.65	-6.65	9,816 SAR	1.64	15.27
Qatar (QE Index)	10,845.12	-0.62	1.54	1.54	-6.72	-6.72	555 QAR	1.29	12.82
Dubai (DFMGI)	3,329.41	0.02	0.02	-0.20	4.18	4.18	479 AED	1.22	13.13
Abu Dhabi (ADI)	10,279.29	-0.08	0.12	0.67	21.10	21.10	1,435 AED	2.00	19.93
Bahrain (BAX)	1,891.71	0.25	-0.19	-0.19	5.26	5.26	19 BHD	1.63	15.11
MUSCAT SE INDEX	4,848.40	-0.47	-0.19	-0.19	17.41	17.41	5 OMR	0.99	13.25
SP GCC Comp LMC	179.14	-0.92	0.10	0.20	-5.60	-5.60			
SP UAE PRICE INDEX	138.58	-0.16	0.14	0.79	-6.02	-6.02			

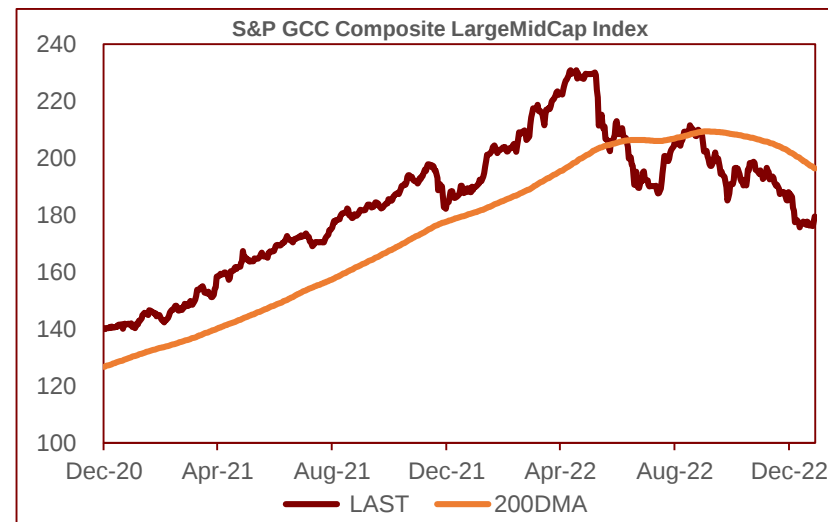
Developed Markets

MSCI World Index	2,624.35	0.90	0.47	0.83	-18.79	-18.79			
U.S. (S&P 500)	3,852.97	0.75	0.10	0.35	-19.16	-19.16			
U.K. (FTSE 100)	7,585.19	0.41	0.96	1.79	2.72	2.72			
Japan (Topix)	1,868.15	-1.25	-1.43	-1.25	-6.23	-6.23			

Emerging Markets

MSCI EM Index	974.22	1.21	1.75	1.87	-20.92	-20.92			
China (SSE Composite)	3,123.52	0.22	1.62	1.11	-14.18	-14.18			
India (Sensex)	60,657.45	-1.04	-0.78	-0.30	4.13	4.13			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,082.68	-0.72	-2.87	-2.87	0.56	0.56	45.88 KWD	2.03	28.19
Kuwait Premier Index	7,853.39	-0.78	-3.23	-3.23	2.81	2.81	35.98 KWD	2.15	24.00
Kuwait Main Index	5,516.71	-0.51	-1.43	-1.43	-6.28	-6.28	9.91 KWD	1.58	43.48
NIC 50	8,790.04	-0.78	-3.24	-3.24	2.80	3.14	28.60 KWD	2.13	23.00
Kuwait Sector									
Banking	1,747.13	-0.43	-2.61	-2.61	7.66	7.66	29.44 KWD	1.29	25.00
Telecom	1,151.50	-1.15	-2.54	-2.54	5.70	5.70	3.53 KWD	1.98	11.79
Industrials	1,030.31	-1.45	-4.50	-4.50	-9.74	-9.74	3.65 KWD	0.80	18.27
Financial services	1,211.40	-1.57	-3.65	-3.65	-14.89	-14.89	3.45 KWD	0.73	16.23
Real estate	1,177.82	-0.73	-2.56	-2.56	-11.20	-11.20	2.56 KWD	0.58	20.73
Basic materials	846.22	-1.10	-2.18	-2.18	-17.42	-17.42	0.76 KWD	1.28	8.16
Health care	461.85	0.00	0.00	0.00	-42.05	-42.05	0.23 KWD	2.62	11.92
Consumer services	476.53	0.95	-0.71	-0.71	-34.82	-34.82	0.70 KWD	0.94	11.23
Insurance	1,548.11	0.08	-0.17	-0.17	0.96	0.96	0.64 KWD	0.79	9.50
Consumer Disc	1,374.80	-2.35	-7.53	-7.53	2.86	2.86	0.15 KWD	0.96	0.00
Energy	1,132.15	-2.00	-0.56	-0.56	-20.73	-20.73	0.24 KWD	0.82	4.62
Technology	756.60	0.97	8.67	8.67	10.64	10.64	0.01 KWD	0.93	0.00
Utilities	481.58	-0.54	-2.66	-2.66	-19.74	-19.74	0.20 KWD	1.69	15.05



What Move the GCC markets

Oil Prices

Oil edged lower on Wednesday after slumping in the previous session, weighed down



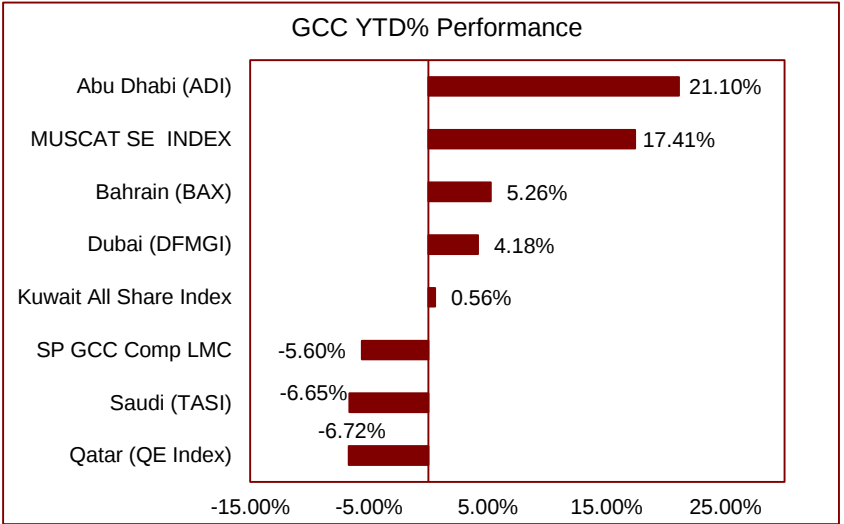
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.072	0.19	-0.56	-0.56	12.90	12.90	8.10 KWD	2.06	27.00
KFH	0.786	-0.63	-4.50	-4.50	3.92	3.92	10.56 KWD	3.24	32.00
Zain	0.551	-1.08	-2.13	-2.13	-7.39	-7.39	2.39 KWD	1.98	11.79
BOUBYAN BANK	0.762	-1.17	-4.51	-4.51	6.97	6.97	2.85 KWD	3.02	34.00
Agility	0.677	-1.88	-5.97	-5.97	-14.03	-14.03	1.81 KWD	1.25	44.25
Saudi Arabia									
ARAMCO	31.70	-1.55	-1.25	-1.25	-2.60	-2.60	6,973.44 SAR	5.02	12.31
SABIC	90.00	-0.66	0.67	0.67	-22.41	-22.41	269.98 SAR	1.48	35.00
STC	37.15	-1.59	1.50	1.50	-17.37	-17.37	185.74 SAR	2.53	15.67
AL-RAJHI BANK	76.20	-1.42	1.33	1.33	-14.02	-14.02	304.78 SAR	3.54	20.33
NCB	50.00	-1.96	-0.99	-0.99	-22.36	-22.36	223.88 SAR	1.37	12.30
United Arab Emirates									
ETISALAT.AD	22.96	-1.12	-0.78	0.44	-27.57	-27.57	206.60 AED	5.10	21.10
FAB.AD	17.20	-0.46	-1.60	0.58	-7.64	-7.64	190.03 AED	1.69	13.67
EMIRATES NBD	13.15	1.15	1.15	1.15	-2.95	-2.95	83.07 AED	0.94	7.85
DB ISLAMIC BK	5.65	0.53	-1.05	-0.88	5.02	5.02	40.91 AED	1.01	8.25
EMAAR PROPERT	5.89	-0.84	0.51	0.51	20.45	20.45	52.06 AED	0.74	6.78
Qatar									
QNB	18.15	-0.33	0.83	0.83	-10.10	-10.10	167.36 QAR	1.60	13.00
INDUSTRIES QAT	13.31	-1.26	3.90	3.90	-14.07	-14.07	80.39 QAR	1.99	8.48
QA ISLAMIC BK	19.85	0.00	6.95	6.95	8.29	8.29	46.83 QAR	1.78	12.73
MASRAF AL RAYA	3.24	-0.77	2.14	2.14	-30.19	-30.19	30.07 QAR	1.24	20.27
MESAIEED PETRO	2.06	-0.91	-3.10	-3.10	-1.39	-1.39	25.85 QAR	1.51	13.67
OMAN									
BANK MUSCAT	0.280	0.36	1.82	1.82	21.49	21.49	2.10 OMR	0.97	8.33
OMANTEL	0.932	4.95	1.30	1.30	23.94	23.94	0.70 OMR	1.18	7.69
BANK DHOFAR	0.175	0.00	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 -0.72 %The leading sector bottom performance indices today are Consumer Disc -2.35 % Energy -2 % Financial services -1.57 % respectively

KSA

Saudi Armco has a negative performance today by -1.55 %, SABIC has a negative performance today by -0.66 %, STC has a negative performance today by -1.59 %, Al Rajhi Bank has a negative performance today by -1.42 %



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