



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, April 10th 2023



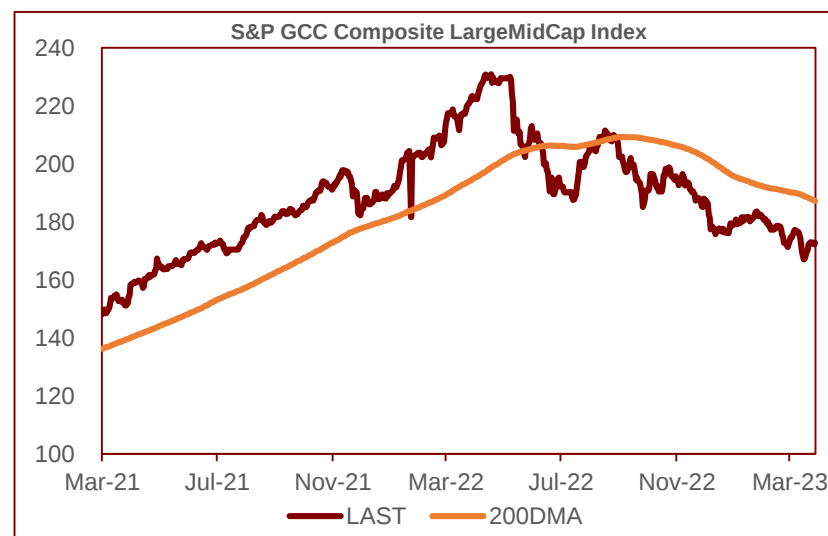


Market Watch

10 April 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,905.48	-0.55	-0.01	2.98	2.98	4.08	10,134 SAR	1.78	17.53
Qatar (QE Index)	10,228.84	-0.22	-1.10	0.16	0.16	-4.23	538 QAR	1.28	11.32
Dubai (DFMGI)	3,411.80	0.04	-0.08	0.15	0.15	2.27	494 AED	1.18	22.23
Abu Dhabi (ADI)	9,499.20	0.40	0.30	0.73	0.73	-6.97	1,435 AED	1.75	20.86
Bahrain (BAX)	1,884.37	-0.10	-0.08	-0.12	-0.12	-0.57	19 BHD	1.72	18.00
MUSCAT SE INDEX	4,739.28	-0.55	-0.36	-2.55	-2.55	-2.43	5 OMR	1.03	13.25
SP GCC Comp LMC	176.64	-0.48	-0.40	1.71	1.71	-1.20			
SP UAE PRICE INDEX	130.40	0.75	0.75	1.90	1.90	-5.16			
Developed Markets									
MSCI World Index	2,786.20	-0.15	-0.14	-0.19	-0.19	7.05			
U.S. (S&P 500)	4,109.11	0.10	0.10	0.00	0.00	7.02			
U.K. (FTSE 100)	7,741.56	0.00	0.00	1.44	1.44	3.89			
Japan (Topix)	1,976.53	0.56	0.78	-1.35	-1.35	4.48			
Emerging Markets									
MSCI EM Index	988.68	0.16	0.43	-0.16	-0.16	3.38			
China (SSE Composite)	3,315.36	-0.37	0.08	1.30	1.30	7.32			
India (Sensex)	59,846.51	0.02	0.02	1.45	1.45	-1.63			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,833.10	-1.01	-1.95	-3.09	-3.09	-6.29	44.39 KWD	1.60	21.04
Kuwait Premier Index	7,555.73	-1.12	-2.19	-3.40	-3.40	-6.90	34.62 KWD	1.59	21.06
Kuwait Main Index	5,407.41	-0.53	-0.89	-1.70	-1.70	-3.38	9.77 KWD	1.65	20.98
NIC 50	8,545.58	-1.12	-2.20	-3.41	-3.41	-5.92	28.60 KWD	1.57	20.06
Kuwait Sector									
Banking	1,686.68	-1.37	-2.42	-3.77	-3.77	-5.98	28.49 KWD	1.28	22.06
Telecom	1,108.62	-0.06	-0.92	-2.09	-2.09	-6.17	3.41 KWD	1.90	11.90
Industrials	946.53	-0.02	-1.30	-4.09	-4.09	-12.27	3.34 KWD	0.77	17.42
Financial services	1,179.27	-0.89	-1.72	-1.40	-1.40	-6.20	3.45 KWD	0.66	20.77
Real estate	1,091.39	0.10	-0.18	1.04	1.04	-9.71	2.38 KWD	0.51	12.62
Basic materials	836.33	-0.79	-1.01	-2.43	-2.43	-3.33	0.75 KWD	1.50	7.73
Health care	462.45	0.00	0.00	1.53	1.53	0.13	0.23 KWD	2.48	10.54
Consumer services	442.20	-0.70	-0.70	-0.69	-0.69	-7.87	0.72 KWD	0.81	12.50
Insurance	1,881.25	-1.07	-1.83	-1.50	-1.50	21.31	0.77 KWD	0.79	10.16
Consumer Disc	1,430.64	-0.66	-0.55	-2.14	-2.14	-3.78	0.14 KWD	0.89	0.00
Energy	1,000.04	0.19	0.19	0.22	0.22	-12.16	0.21 KWD	0.56	4.37
Technology	632.92	0.00	0.00	-0.46	-0.46	-9.09	0.01 KWD	0.78	0.00
Utilities	450.00	-0.58	-1.72	-3.39	-3.39	-9.04	0.19 KWD	1.61	13.00



What Move the GCC markets

Oil Prices

Oil prices edged higher on Tuesday as market participants weighed supply cuts from OPEC+ that would tighten the global market against concerns about further interest rate hikes potentially hurting demand. Investors were awaiting a slate of reports on inflation, oil demand and supply due this week that could give the market direction. Brent crude rose 8 cents at \$84.26 a barrel.

Kuwait Market

The market closed down today by - 1.01% at 6,833.1 value traded 21.8 million KD, Premier market value traded reached 19.8 million KD down by - 1.12% at 7,555.73.

KSA Market

The market closed down today by - 0.55% at 10,905.48.

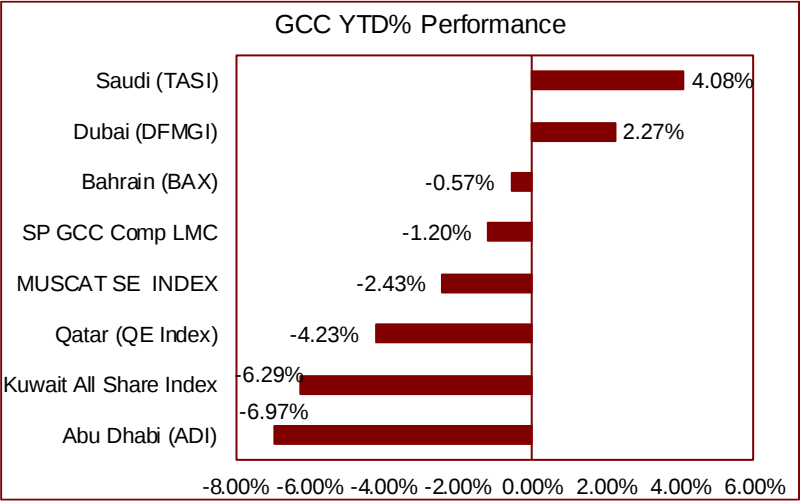


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.941	-2.28	-3.49	-6.43	-6.43	-8.34	7.48 KWD	1.84	27.00
KFH	0.714	-1.52	-3.38	-4.92	-4.92	-4.57	10.57 KWD	1.79	32.00
Zain	0.539	0.00	-0.55	-0.19	-0.19	-4.26	2.34 KWD	1.90	11.90
BOUBYAN BANK	0.645	-0.77	-0.92	0.31	0.31	-19.17	2.42 KWD	2.54	34.00
Agility	0.566	0.00	-2.08	-8.86	-8.86	-21.39	1.52 KWD	0.90	21.81
Saudi Arabia									
ARAMCO	32.60	-0.31	-0.15	0.93	0.93	1.56	7,171.81 SAR	4.95	12.31
SABIC	92.50	-0.32	-0.11	2.44	2.44	3.47	277.49 SAR	1.49	35.00
STC	41.30	0.12	0.36	3.12	3.12	12.84	206.49 SAR	2.80	16.92
AL-RAJHI BANK	75.50	-1.56	-0.53	2.72	2.72	0.40	301.99 SAR	3.01	19.67
NCB	49.90	-0.10	0.50	8.83	8.83	-1.19	223.45 SAR	1.33	12.19
United Arab Emirates									
ETISALAT.AD	23.18	0.87	2.02	5.08	5.08	1.40	206.60 AED	5.10	21.10
FAB.AD	13.00	-0.15	-0.31	0.93	0.93	-23.98	143.62 AED	1.25	11.01
EMIRATES NBD	13.15	-1.13	-1.13	0.00	0.00	1.15	83.06 AED	0.89	6.64
DB ISLAMIC BK	5.30	0.57	0.76	1.34	1.34	-7.02	38.37 AED	0.93	7.59
EMAAR PROPERT	5.67	0.18	0.35	1.25	1.25	-3.24	50.11 AED	0.73	6.81
Qatar									
QNB	16.14	0.25	-0.37	0.44	0.44	-10.33	148.34 QAR	1.42	11.23
INDUSTRIES QAT	13.08	0.15	-0.83	0.62	0.62	2.11	78.74 QAR	1.88	8.98
QA ISLAMIC BK	18.42	0.00	-0.43	3.60	3.60	-0.75	43.31 QAR	1.60	11.40
MASRAF AL RAYA	2.71	-0.44	-1.99	-8.26	-8.26	-14.51	25.09 QAR	1.05	17.20
MESAIEED PETRO	1.95	-0.96	-0.81	1.56	1.56	-8.32	24.38 QAR	1.41	13.86
OMAN									
BANK MUSCAT	0.273	-0.73	0.00	-0.73	-0.73	-0.73	2.05 OMR	0.92	8.33
OMANTEL	1.030	15.99	-2.37	-6.36	-6.36	11.96	0.77 OMR	1.22	7.69
BANK DHOFAR	0.155	0.00	0.00	-3.13	-3.13	-11.43	0.47 QAR	0.65	14.93
NAT BANK OF OMAN	0.260	0.00	0.00	-2.99	-2.99	-10.03	0.42 QAR	0.66	12.71
OMINVEST	0.424	-1.40	3.41	-14.52	-14.52	0.95	0.28 QAR	0.80	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
29-March 23	24.80%	16.29%	0.06%	1.37%	0.41%	4.59%	17.70%	14.39%	5.93%	5.11%
5-April 23	24.85%	16.26%	0.06%	1.38%	0.41%	4.65%	17.70%	14.34%	6.07%	5.07%

End of Report
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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is down today by -1.01 %The leading sector bottom performance indices today are Banking -1.37 % Insurance -1.07 % Financial services -0.89 % respectively.

KSA
Saudi Armco have negative performance today by -0.31 %, SABIC have negative performance today by -0.32%. STC has a positive performance today by + 0.12 %, Al Rajhi Bank have negative performance today by -1.56 %

U.A.E
ETISALAT .AD has a positive performance today by + 0.87 %, FAB.AD have negative performance today by -0.15 %



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