

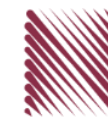


شركة الاستثمارات الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Tuesday, April 11<sup>th</sup> 2023

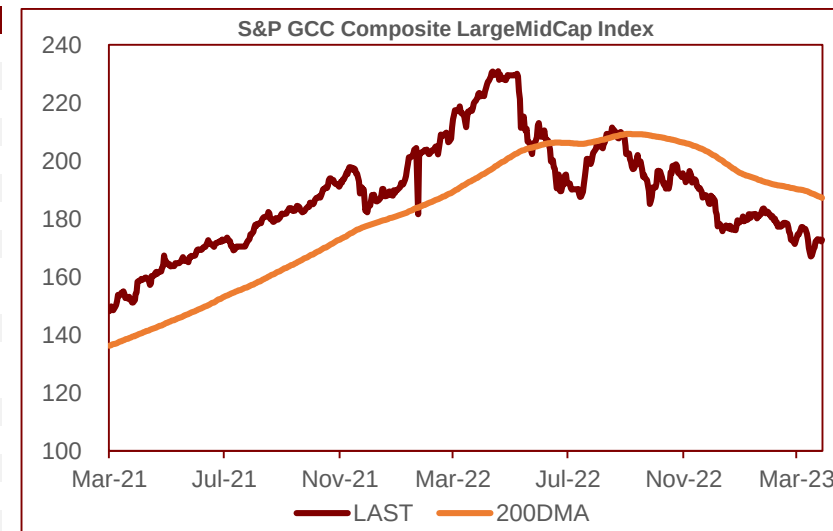




### Market Watch

Tuesday, April 11<sup>th</sup> 2023

| Description              | Close     | Day Δ | WTD   | MTD   | QTD   | YTD    | M Cap (in Bn) | PBV  | PE    |
|--------------------------|-----------|-------|-------|-------|-------|--------|---------------|------|-------|
| <b>GCC Markets</b>       |           |       |       |       |       |        |               |      |       |
| Saudi (TASI)             | 10,849.05 | -0.52 | -0.52 | 2.45  | 2.45  | 3.54   | 10,086 SAR    | 1.78 | 17.49 |
| Qatar (QE Index)         | 10,272.52 | 0.43  | -0.68 | 0.59  | 0.59  | -3.82  | 542 QAR       | 1.28 | 11.07 |
| Dubai (DFMGI)            | 3,444.22  | 0.95  | 0.87  | 1.10  | 1.10  | 3.24   | 497 AED       | 1.21 | 23.47 |
| Abu Dhabi (ADI)          | 9,510.98  | 0.12  | 0.42  | 0.86  | 0.86  | -6.86  | 1,435 AED     | 1.75 | 20.87 |
| Bahrain (BAX)            | 1,881.00  | -0.18 | -0.26 | -0.30 | -0.30 | -0.75  | 19 BHD        | 1.71 | 18.00 |
| MUSCAT SE INDEX          | 4,768.55  | 0.62  | 0.26  | -1.94 | -1.94 | -1.83  | 5 OMR         | 1.03 | 13.25 |
| SP GCC Comp LMC          | 176.42    | -0.13 | -0.53 | 1.58  | 1.58  | -1.32  |               |      |       |
| SP UAE PRICE INDEX       | 131.03    | 0.48  | 1.23  | 2.38  | 2.38  | -4.71  |               |      |       |
| <b>Developed Markets</b> |           |       |       |       |       |        |               |      |       |
| MSCI World Index         | 2,797.07  | 0.39  | 0.25  | 0.20  | 0.20  | 7.47   |               |      |       |
| U.S. (S&P 500)           | 4,108.94  | 0.00  | 0.10  | -0.01 | -0.01 | 7.02   |               |      |       |
| U.K. (FTSE 100)          | 7,785.72  | 0.57  | 0.57  | 2.02  | 2.02  | 4.48   |               |      |       |
| Japan (Topix)            | 1,991.85  | 0.78  | 1.56  | -0.58 | -0.58 | 5.29   |               |      |       |
| <b>Emerging Markets</b>  |           |       |       |       |       |        |               |      |       |
| MSCI EM Index            | 996.25    | 0.77  | 1.20  | 0.60  | 0.60  | 4.17   |               |      |       |
| China (SSE Composite)    | 3,313.57  | -0.05 | 0.03  | 1.24  | 1.24  | 7.26   |               |      |       |
| India (Sensex)           | 60,157.72 | 0.52  | 0.54  | 1.98  | 1.98  | -1.12  |               |      |       |
| <b>Kuwait</b>            |           |       |       |       |       |        |               |      |       |
| Kuwait All Share Index   | 6,903.73  | 1.03  | -0.94 | -2.09 | -2.09 | -5.33  | 44.64 KWD     | 1.59 | 21.35 |
| Kuwait Premier Index     | 7,645.47  | 1.19  | -1.03 | -2.25 | -2.25 | -5.79  | 34.89 KWD     | 1.61 | 21.34 |
| Kuwait Main Index        | 5,427.02  | 0.36  | -0.53 | -1.34 | -1.34 | -3.03  | 9.75 KWD      | 1.53 | 21.41 |
| NIC 50                   | 8,655.44  | 1.29  | -1.04 | -2.26 | -2.26 | -4.72  | 28.60 KWD     | 1.59 | 20.34 |
| <b>Kuwait Sector</b>     |           |       |       |       |       |        |               |      |       |
| Banking                  | 1,702.62  | 0.95  | -1.50 | -2.87 | -2.87 | -5.09  | 28.63 KWD     | 1.24 | 22.34 |
| Telecom                  | 1,124.68  | 1.45  | 0.51  | -0.67 | -0.67 | -4.81  | 3.44 KWD      | 1.92 | 12.03 |
| Industrials              | 961.08    | 1.54  | 0.22  | -2.62 | -2.62 | -10.92 | 3.38 KWD      | 0.77 | 17.39 |
| Financial services       | 1,195.25  | 1.36  | -0.39 | -0.06 | -0.06 | -4.93  | 3.47 KWD      | 0.66 | 20.84 |
| Real estate              | 1,110.52  | 1.75  | 1.57  | 2.81  | 2.81  | -8.12  | 2.41 KWD      | 0.51 | 13.76 |
| Basic materials          | 842.96    | 0.79  | -0.22 | -1.66 | -1.66 | -2.56  | 0.76 KWD      | 1.51 | 7.80  |
| Health care              | 462.45    | 0.00  | 0.00  | 1.53  | 1.53  | 0.13   | 0.23 KWD      | 1.06 | 10.54 |
| Consumer services        | 446.67    | 1.01  | 0.31  | 0.31  | 0.31  | -6.93  | 0.70 KWD      | 0.83 | 13.12 |
| Insurance                | 1,880.75  | -0.03 | -1.86 | -1.53 | -1.53 | 21.27  | 0.77 KWD      | 0.79 | 10.16 |
| Consumer Disc            | 1,415.20  | -1.08 | -1.62 | -3.20 | -3.20 | -4.82  | 0.14 KWD      | 0.90 | 0.00  |
| Energy                   | 1,004.76  | 0.47  | 0.66  | 0.69  | 0.69  | -11.75 | 0.21 KWD      | 0.61 | 4.41  |
| Technology               | 632.92    | 0.00  | 0.00  | -0.46 | -0.46 | -9.09  | 0.01 KWD      | 0.78 | 0.00  |
| Utilities                | 452.63    | 0.58  | -1.15 | -2.83 | -2.83 | -8.51  | 0.19 KWD      | 1.62 | 13.08 |



### What Move the GCC markets

#### Oil Prices

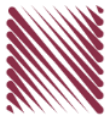
Oil prices edged higher on Tuesday as market participants weighed supply cuts from OPEC+ that would tighten the global market against concerns about further interest rate hikes potentially hurting demand. Investors were awaiting a slate of reports on inflation, oil demand and supply due this week that could give the market direction. Brent crude rose to \$85.61 a barrel.

#### Kuwait Market

The market closed up today by + 1.03% at 6,903.73 value traded 26.8 million KD, Premier market value traded reached 24.1 million KD up by + 1.19% at 7,645.47.

#### KSA Market

The market closed down today by - 0.52% at 10,849.05.

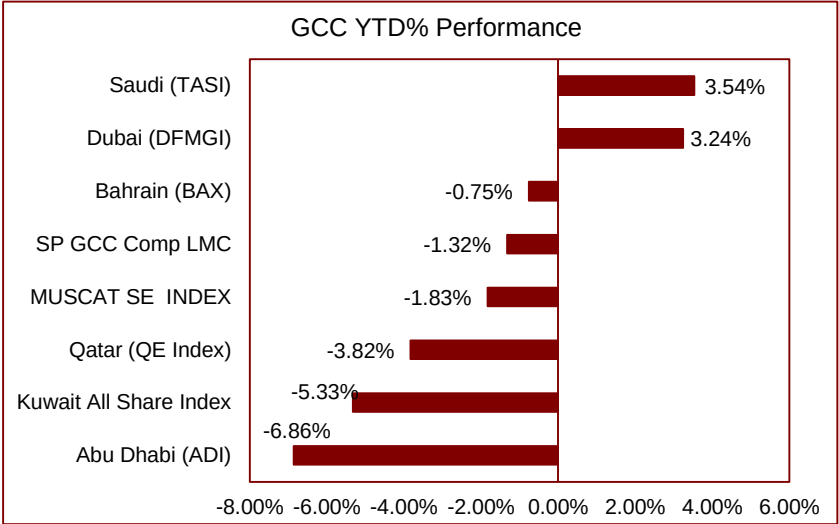


| Description          | Close | Day Δ | WTD   | MTD    | QTD    | YTD    | M Cap (in Bn) | PBV  | PE    |
|----------------------|-------|-------|-------|--------|--------|--------|---------------|------|-------|
| Blue Chip Watch      |       | %     | %     | %      | %      | %      |               |      |       |
| Kuwait               |       |       |       |        |        |        |               |      |       |
| NBK                  | 0.950 | 0.96  | -2.56 | -5.54  | -5.54  | -7.47  | 7.52 KWD      | 1.85 | 27.00 |
| KFH                  | 0.729 | 2.10  | -1.35 | -2.92  | -2.92  | -2.56  | 10.74 KWD     | 1.82 | 32.00 |
| Zain                 | 0.545 | 1.11  | 0.55  | 0.93   | 0.93   | -3.20  | 2.35 KWD      | 1.92 | 12.03 |
| BOUBYAN BANK         | 0.649 | 0.62  | -0.31 | 0.93   | 0.93   | -18.67 | 2.42 KWD      | 2.56 | 34.00 |
| Agility              | 0.585 | 3.36  | 1.21  | -5.80  | -5.80  | -18.75 | 1.56 KWD      | 0.93 | 22.54 |
| Saudi Arabia         |       |       |       |        |        |        |               |      |       |
| ARAMCO               | 32.45 | -0.46 | -0.61 | 0.46   | 0.46   | 1.09   | 7,138.62 SAR  | 4.93 | 12.27 |
| SABIC                | 91.10 | -1.51 | -1.62 | 0.89   | 0.89   | 1.90   | 273.29 SAR    | 1.47 | 35.00 |
| STC                  | 41.90 | 1.45  | 1.82  | 4.62   | 4.62   | 14.48  | 209.49 SAR    | 2.84 | 16.94 |
| AL-RAJHI BANK        | 74.60 | -1.19 | -1.71 | 1.50   | 1.50   | -0.80  | 298.38 SAR    | 2.98 | 19.36 |
| NCB                  | 49.55 | -0.70 | -0.20 | 8.07   | 8.07   | -1.88  | 221.87 SAR    | 1.33 | 12.18 |
| United Arab Emirates |       |       |       |        |        |        |               |      |       |
| ETISALAT.AD          | 23.20 | 0.09  | 2.11  | 5.17   | 5.17   | 1.49   | 206.60 AED    | 5.10 | 21.10 |
| FAB.AD               | 13.12 | 0.92  | 0.61  | 1.86   | 1.86   | -23.27 | 144.95 AED    | 1.26 | 11.11 |
| EMIRATES NBD         | 13.30 | 1.14  | 0.00  | 1.14   | 1.14   | 2.31   | 84.01 AED     | 0.90 | 6.72  |
| DB ISLAMIC BK        | 5.30  | 0.00  | 0.76  | 1.34   | 1.34   | -7.02  | 38.38 AED     | 0.93 | 7.59  |
| EMAAR PROPERT        | 5.71  | 0.71  | 1.06  | 1.96   | 1.96   | -2.56  | 50.47 AED     | 0.73 | 6.86  |
| Qatar                |       |       |       |        |        |        |               |      |       |
| QNB                  | 16.08 | -0.37 | -0.74 | 0.06   | 0.06   | -10.67 | 148.52 QAR    | 1.46 | 10.62 |
| INDUSTRIES QAT       | 13.12 | 0.31  | -0.53 | 0.92   | 0.92   | 2.42   | 79.38 QAR     | 1.89 | 9.00  |
| QA ISLAMIC BK        | 18.60 | 0.98  | 0.54  | 4.61   | 4.61   | 0.22   | 43.95 QAR     | 1.61 | 11.51 |
| MASRAF AL RAYA       | 2.73  | 0.74  | -1.27 | -7.58  | -7.58  | -13.88 | 25.40 QAR     | 1.05 | 17.33 |
| MESAIEED PETRO       | 1.95  | 0.00  | -0.81 | 1.56   | 1.56   | -8.32  | 24.50 QAR     | 1.41 | 13.86 |
| OMAN                 |       |       |       |        |        |        |               |      |       |
| BANK MUSCAT          | 0.272 | -0.37 | -0.37 | -1.09  | -1.09  | -1.09  | 2.04 OMR      | 0.91 | 8.33  |
| OMANTEL              | 1.050 | 18.24 | -0.47 | -4.55  | -4.55  | 14.13  | 0.79 OMR      | 1.24 | 7.69  |
| BANK DHOFAR          | 0.160 | 3.23  | 3.23  | 0.00   | 0.00   | -8.57  | 0.48 QAR      | 0.67 | 14.93 |
| NAT BANK OF OMAN     | 0.268 | 3.08  | 3.08  | 0.00   | 0.00   | -7.27  | 0.44 QAR      | 0.68 | 12.71 |
| OMINVEST             | 0.410 | -3.30 | 0.00  | -17.34 | -17.34 | -2.38  | 0.27 QAR      | 0.77 | 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**  
The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed and others authorized to receive it.

Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

**Kuwait**  
The market is up today by + 1.03 %The leading sector best performance indices today are Real estate 1.75 % Industrials 1.54 % Telecom 1.45 % respectively

**KSA**  
Saudi Armco has a negative performance today by -0.46 %, SABIC has a negative performance today by -1.51 %, STC has a positive performance today by + 1.45 %, Al Rajhi Bank has a negative performance today by -1.19 %

**U.A.E**  
ETISALAT .AD has a positive performance today by + 0.09 %, FAB.AD has a positive performance today by + 0.92 %



شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | [www.nic.com.kw](http://www.nic.com.kw)