



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, April 12th 2023



DAILY MARKETS WRAP,

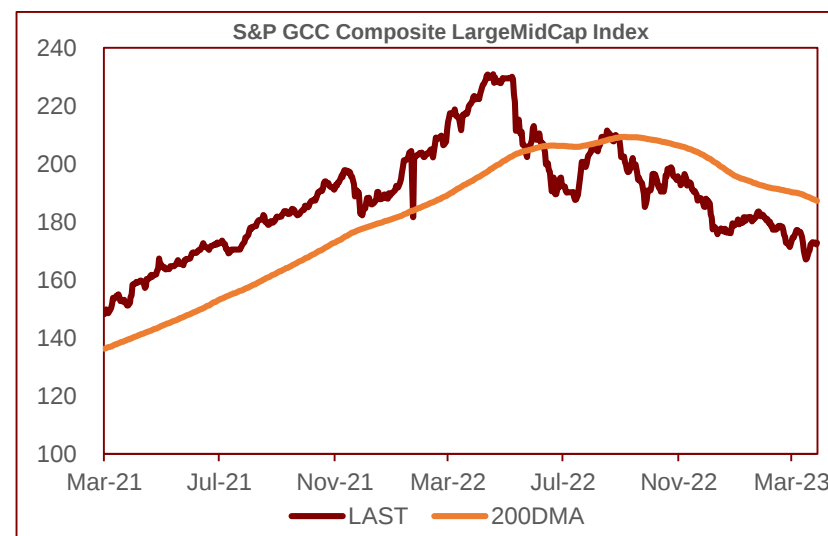
NIC RESEARCH AND STUDIES DEP



Market Watch

Wednesday, April 12th 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	10,935.39	0.80	0.27	3.26	3.26	4.36	10,163 SAR	1.78	17.46
Qatar (QE Index)	10,225.58	-0.46	-1.13	0.13	0.13	-4.26	545 QAR	1.30	10.81
Dubai (DFMGI)	3,496.52	1.52	2.40	2.64	2.64	4.81	502 AED	1.22	23.53
Abu Dhabi (ADI)	9,548.83	0.40	0.82	1.26	1.26	-6.49	1,435 AED	1.76	20.90
Bahrain (BAX)	1,880.72	-0.02	-0.27	-0.31	-0.31	-0.77	19 BHD	1.71	18.00
MUSCAT SE INDEX	4,767.37	-0.02	0.23	-1.97	-1.97	-1.85	5 OMR	1.03	13.25
SP GCC Comp LMC	177.81	0.79	0.26	2.38	2.38	-0.54			
SP UAE PRICE INDEX	132.44	1.08	2.33	3.49	3.49	-3.68			
Developed Markets									
MSCI World Index	2,795.48	-0.06	0.19	0.14	0.14	7.41			
U.S. (S&P 500)	4,091.95	-0.41	-0.32	-0.42	-0.42	6.58			
U.K. (FTSE 100)	7,824.84	0.50	1.08	2.53	2.53	5.01			
Japan (Topix)	2,006.92	0.76	2.33	0.17	0.17	6.09			
Emerging Markets									
MSCI EM Index	993.58	-0.27	0.93	0.33	0.33	3.89			
China (SSE Composite)	3,327.18	0.41	0.44	1.66	1.66	7.70			
India (Sensex)	60,392.77	0.39	0.94	2.38	2.38	-0.74			
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	6,993.18	1.30	0.34	-0.82	-0.82	-4.10	45.22 KWD	1.63	21.72
Kuwait Premier Index	7,763.54	1.54	0.50	-0.74	-0.74	-4.34	35.46 KWD	1.65	21.76
Kuwait Main Index	5,438.19	0.21	-0.32	-1.14	-1.14	-2.83	9.76 KWD	1.56	21.61
NIC 50	8,787.19	1.52	0.49	-0.75	-0.75	-3.27	28.60 KWD	1.63	20.76
Kuwait Sector									
Banking	1,727.99	1.49	-0.03	-1.42	-1.42	-3.67	29.08 KWD	1.27	22.76
Telecom	1,132.18	0.67	1.18	-0.01	-0.01	-4.17	3.47 KWD	1.93	12.10
Industrials	975.17	1.47	1.69	-1.19	-1.19	-9.61	3.43 KWD	0.76	17.44
Financial services	1,207.81	1.05	0.66	0.99	0.99	-3.93	3.47 KWD	0.68	21.90
Real estate	1,119.17	0.78	2.36	3.61	3.61	-7.41	2.43 KWD	0.51	13.85
Basic materials	842.83	-0.02	-0.24	-1.67	-1.67	-2.58	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	0.00	0.31	0.31	0.31	-6.93	0.72 KWD	0.84	13.37
Insurance	1,890.21	0.50	-1.37	-1.03	-1.03	21.88	0.78 KWD	0.79	10.01
Consumer Disc	1,439.04	1.68	0.04	-1.57	-1.57	-3.21	0.14 KWD	0.90	0.00
Energy	986.68	-1.80	-1.15	-1.12	-1.12	-13.34	0.21 KWD	0.60	4.41
Technology	599.46	-5.29	-5.29	-5.72	-5.72	-13.90	0.01 KWD	0.74	0.00
Utilities	463.16	2.33	1.15	-0.56	-0.56	-6.38	0.19 KWD	1.66	13.38



What Move the GCC markets

Oil Prices

Oil prices steadied Wednesday as the market waited for U.S. inflation data later in the day that will likely influence the Federal Reserve's policy on interest rate hikes. Brent crude gained 14 cents, or 0.2%, to \$85.75 a barrel

Kuwait Market

The market closed up today by + 1.30% at 6,993.18 value traded 48.8 million KD, Premier market value traded reached 48.8 million KD up by + 1.54% at 7,763.54.

KSA Market

The market closed up today by + 0.80% at 10,935.39.



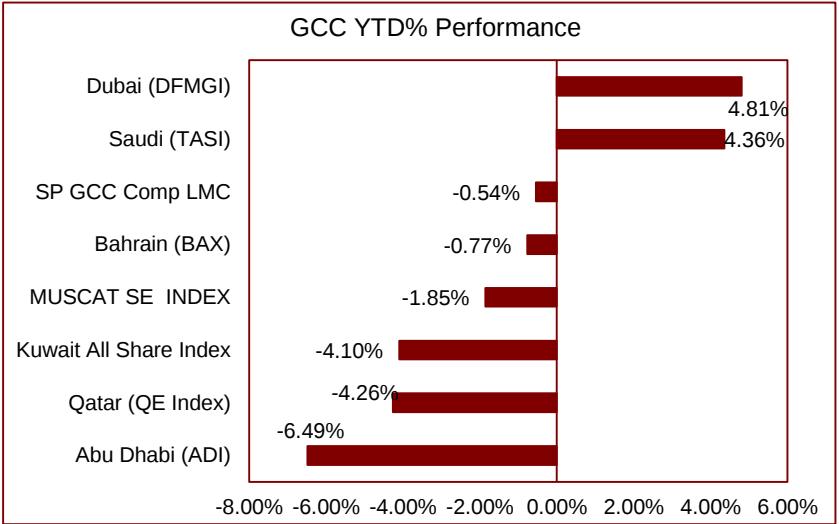
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.967	1.79	-0.82	-3.85	-3.85	-5.81	7.66 KWD	1.89	27.00
KFH	0.741	1.65	0.27	-1.32	-1.32	-0.96	10.93 KWD	1.85	32.00
Zain	0.548	0.55	1.11	1.48	1.48	-2.66	2.37 KWD	1.93	12.10
BOUBYAN BANK	0.632	3.24	2.92	4.20	4.20	-16.04	2.50 KWD	2.80	34.00
Agility	0.601	2.74	3.98	-3.22	-3.22	-16.53	1.61 KWD	0.96	23.15
Saudi Arabia									
ARAMCO	32.70	0.77	0.15	1.24	1.24	1.87	7,193.23 SAR	4.96	12.21
SABIC	91.50	0.44	-1.19	1.33	1.33	2.35	274.47 SAR	1.48	35.00
STC	42.45	1.31	3.16	5.99	5.99	15.98	212.23 SAR	2.88	17.18
AL-RAJHI BANK	75.20	0.80	-0.92	2.31	2.31	0.00	300.77 SAR	3.00	19.13
NCB	50.00	0.91	0.70	9.05	9.05	-0.99	223.88 SAR	1.34	12.10
United Arab Emirates									
ETISALAT.AD	23.50	1.29	3.43	6.53	6.53	2.80	206.60 AED	5.10	21.10
FAB.AD	13.20	0.61	1.23	2.48	2.48	-22.81	145.82 AED	1.27	11.18
EMIRATES NBD	13.30	0.00	0.00	1.14	1.14	2.31	84.01 AED	0.90	6.72
DB ISLAMIC BK	5.37	1.32	2.09	2.68	2.68	-5.79	38.88 AED	0.94	7.69
EMAAR PROPERT	5.91	3.50	4.60	5.54	5.54	0.85	52.23 AED	0.76	7.10
Qatar									
QNB	16.04	-0.25	-0.99	-0.19	-0.19	-10.89	149.06 QAR	1.46	10.59
INDUSTRIES QAT	13.15	0.23	-0.30	1.15	1.15	2.65	80.05 QAR	1.89	9.03
QA ISLAMIC BK	17.80	-4.30	-3.78	0.11	0.11	-4.09	42.32 QAR	1.54	10.87
MASRAF AL RAYA	2.75	0.62	-0.65	-7.01	-7.01	-13.34	25.71 QAR	1.06	17.44
MESAIEED PETRO	1.95	0.05	-0.76	1.61	1.61	-8.27	24.66 QAR	1.41	13.87
OMAN									
BANK MUSCAT	0.272	0.00	-0.37	-1.09	-1.09	-1.09	2.04 OMR	0.91	8.33
OMANTEL	1.015	14.30	-3.79	-7.73	-7.73	10.33	0.76 OMR	1.20	7.69
BANK DHOFAR	0.160	0.00	3.23	0.00	0.00	-8.57	0.48 QAR	0.67	14.93
NAT BANK OF OMAN	0.285	6.34	9.62	6.34	6.34	-1.38	0.46 QAR	0.72	12.71
OMINVEST	0.406	-0.98	-0.98	-18.15	-18.15	-3.33	0.27 QAR	0.76	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
5-April 23	24.85%	16.26%	0.06%	1.38%	0.41%	4.65%	17.70%	14.34%	6.07%	5.07%
12-April 23	24.87%	16.21%	0.06%	1.38%	0.41%	4.65%	17.70%	14.35%	6.12%	5.06%

End of Report

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Leading Sector, Security Performance

Kuwait

The market is up today by + 1.3 %The leading sector best performance indices today are Utilities 2.33 % Consumer Disc 1.68 % Banking 1.49 % respectively

KSA

Saudi Armco has a positive performance today by + 0.77 %, SABIC have positive performance today by + 0.44 %, STC has a positive performance today by + 1.31 %, Al Rajhi Bank has a positive performance today by + 0.8 %

U.A.E

ETISALAT .AD has a positive performance today by + 1.29 %, FAB.AD has a positive performance today by + 0.61 %



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