



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, June 12th 2023



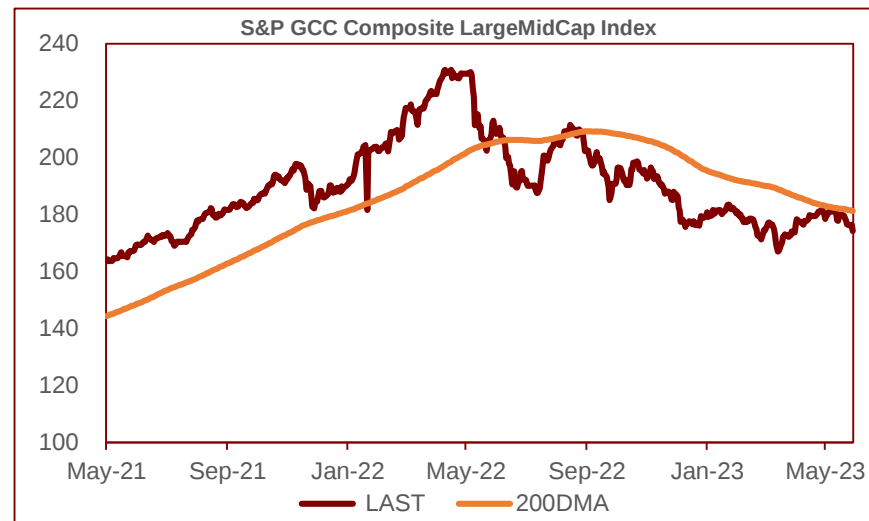


Market Watch

Monday, June 12, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	11,423.13	0.24	0.23	3.71	7.87	9.02	10,888 SAR	2.06	18.24
Qatar (QE Index)	10,150.63	-0.57	-1.04	-0.04	-0.61	-4.97	539 QAR	1.36	11.21
Dubai (DFMGI)	3,701.91	0.09	0.39	3.50	8.66	10.97	527 AED	1.42	19.11
Abu Dhabi (ADI)	9,380.18	0.12	0.30	-0.28	-0.53	-8.14	1,435 AED	1.79	20.73
Bahrain (BAX)	1,953.45	-0.10	-0.05	-0.51	3.54	3.07	20 BHD	6.38	18.00
MUSCAT SE INDEX	4,697.39	0.60	0.83	1.53	-3.41	-3.30	5 OMR	1.00	13.25
SP GCC Comp LMC	178.54	0.12	0.17	2.48	2.80	-0.13			
SP UAE PRICE INDEX	131.72	0.31	0.54	0.62	2.93	-4.20			
Developed Markets									
MSCI World Index	2,906.01	0.71	0.83	3.77	4.10	11.65			
U.S. (S&P 500)	4,338.93	0.93	1.05	3.81	5.59	13.01			
U.K. (FTSE 100)	7,570.69	0.11	-0.38	1.67	-0.80	1.60			
Japan (Topix)	2,238.77	0.65	2.16	5.08	11.74	18.35			
Emerging Markets									
MSCI EM Index	1,003.14	0.08	0.91	4.65	1.30	4.89			
China (SSE Composite)	3,228.83	-0.08	0.47	0.76	-1.35	4.52			
India (Sensex)	62,724.71	0.16	-0.20	0.16	6.33	3.10			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	6,906.78	0.09	0.70	1.62	-2.04	-5.28	44.76 KWD	1.68	17.77
Kuwait Premier Index	7,670.10	0.18	0.86	2.34	-1.94	-5.49	34.96 KWD	1.63	17.68
Kuwait Main Index	5,375.35	-0.26	0.07	-1.20	-2.28	-3.96	9.80 KWD	1.85	18.09
NIC 50	8,720.94	0.73	0.85	2.33	-1.95	-3.99	28.60 KWD	1.61	16.68
Kuwait Sector									
Banking	1,683.95	-0.06	0.55	2.03	-3.93	-6.13	28.41 KWD	1.18	18.68
Telecom	1,095.60	-0.37	0.53	-0.07	-3.24	-7.27	3.36 KWD	1.34	8.69
Industrials	971.85	-0.29	-0.04	0.45	-1.53	-9.92	3.43 KWD	0.80	20.07
Financial services	1,190.47	0.57	0.81	0.53	-0.46	-5.31	3.46 KWD	0.70	19.70
Real estate	1,153.93	1.15	2.59	3.50	6.83	-4.53	2.50 KWD	0.54	20.80
Basic materials	953.50	2.34	2.11	3.79	11.24	10.22	0.82 KWD	1.55	7.78
Health care	455.79	0.00	1.69	-0.66	0.07	-1.31	0.24 KWD	0.96	6.69
Consumer services	528.77	0.39	0.74	5.10	18.75	10.17	0.78 KWD	0.85	14.21
Insurance	2,118.34	0.74	0.46	-0.84	10.91	36.59	0.87 KWD	0.76	10.59
Consumer Disc	1,571.79	0.26	1.66	2.07	7.51	5.71	0.16 KWD	0.98	0.00
Energy	1,013.15	0.96	1.10	2.34	1.53	-11.01	0.21 KWD	0.73	4.37
Technology	651.11	0.00	4.07	-5.69	2.40	-6.48	0.01 KWD	0.81	0.00
Utilities	481.58	1.10	1.10	-0.54	3.39	-2.66	0.20 KWD	1.84	14.99



What Move the GCC markets

Oil Prices

Oil prices fell by around \$3 a barrel on Monday after analysts highlighted rising global supplies and concerns about demand growth just ahead of key inflation data and a U.S. Federal Reserve meeting later this week. Brent crude futures fell \$2.95, or 3.9%, to settle at \$71.84 a barrel.

Kuwait Market

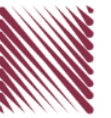
The market closed up today by + 0.7% at 6,906.78 value traded 49.8 million KD, Premier market value traded reached 41.3 million KD up + 0.86% at 7,670.10.

KSA Market

The market closed up today by + 0.24% at 11,423.13.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



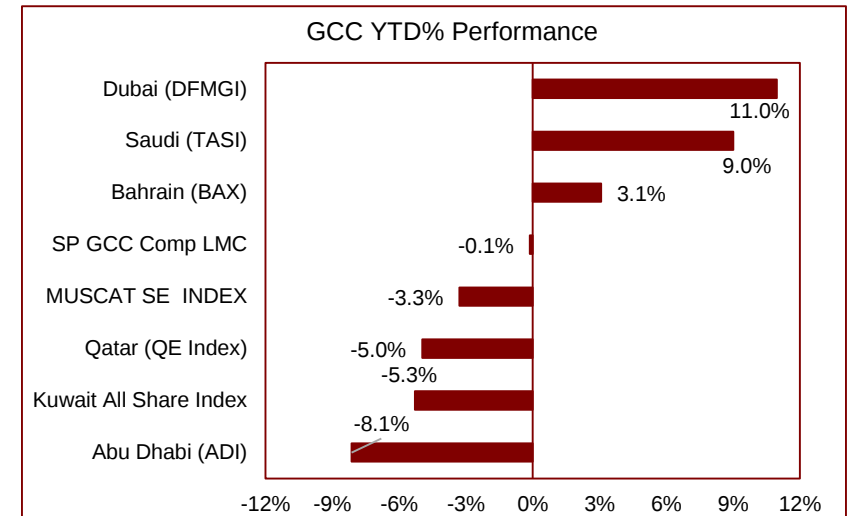
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.936	0.00	0.43	1.74	-6.93	-8.83	7.43 KWD	1.88	27.00
KFH	0.731	-0.27	0.69	3.39	-2.65	-2.30	10.80 KWD	1.86	32.00
Zain	0.511	-0.20	0.00	-1.73	-5.37	-9.24	2.21 KWD	1.72	10.89
BOUBYAN BANK	0.630	1.12	2.11	5.00	3.86	-16.32	2.50 KWD	2.81	34.00
Agility	0.612	-0.49	0.00	0.16	-1.45	-15.00	1.64 KWD	0.86	22.06
Saudi Arabia									
ARAMCO	32.30	-0.15	-0.46	2.54	10.00	10.69	7,815.77 SAR	5.24	13.93
SABIC	89.30	0.45	0.34	1.25	-1.11	-0.11	267.87 SAR	1.43	35.00
STC	43.00	-0.23	-0.69	-0.58	7.37	17.49	214.98 SAR	2.87	17.58
AL-RAJHI BANK	73.50	0.00	0.14	3.96	0.00	-2.26	293.97 SAR	2.96	17.13
NCB	37.25	-0.53	-1.46	0.95	8.86	-1.17	223.48 SAR	1.30	12.09
United Arab Emirates									
ETISALAT.AD	22.40	0.63	-0.09	-2.95	1.54	-2.01	206.60 AED	5.10	21.10
FAB.AD	13.00	0.62	1.25	2.36	0.93	-23.98	143.62 AED	1.28	12.24
EMIRATES NBD	14.25	0.71	1.79	4.40	8.37	9.62	90.01 AED	0.94	5.38
DB ISLAMIC BK	5.41	0.56	1.69	2.85	3.44	-5.09	39.17 AED	0.97	7.52
EMAAR PROPERT	6.09	0.66	0.16	-0.98	8.75	3.92	53.83 AED	0.75	6.42
Qatar									
QNB	15.90	-0.62	-1.24	-0.69	-1.06	-11.67	146.86 QAR	1.44	10.50
INDUSTRIES QAT	11.60	-0.43	-1.36	-3.17	-10.77	-9.45	70.12 QAR	1.92	9.64
QA ISLAMIC BK	17.70	-0.67	-0.84	1.03	-0.45	-4.63	41.79 QAR	1.57	10.81
MASRAF AL RAYA	2.60	-0.34	-0.34	2.08	-11.91	-17.91	24.19 QAR	1.03	19.79
MESAIEED PETRO	1.97	-1.15	-1.99	0.05	2.60	-7.38	24.75 QAR	1.52	15.54
OMAN									
BANK MUSCAT	0.267	0.00	0.00	1.91	-2.91	-2.91	2.01 OMR	0.92	8.33
OMANTEL	0.980	10.36	0.82	1.66	-10.91	6.52	0.74 OMR	1.21	7.69
BANK DHOFAR	0.175	0.00	1.16	0.00	9.38	0.00	0.53 QAR	0.74	14.93
NAT BANK OF OMAN	0.280	1.82	2.56	2.56	4.48	-3.11	0.46 QAR	0.71	12.71
OMINVEST	0.368	0.00	0.55	-0.54	-25.81	-12.38	0.25 QAR	0.69	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
31-May 23	24.51%	15.66%	0.06%	1.36%	0.23%	4.59%	17.67%	13.99%	6.11%	4.76%
08-June 23	24.34%	15.37%	0.06%	1.35%	0.23%	4.57%	17.66%	13.9%	6.09%	4.72%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.09 %The leading sector best performance indices today are Basic materials 2.34 % Real estate 1.15 % Utilities 1.1 % respectively.

KSA

Saudi Armco have negative performance today by -0.15 %, SABIC have positive performance today by + 0.44%. STC have negative performance today by -0.23 %, Al Rajhi Bank flat performance today 0 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.63 %, FAB.AD has a positive performance today by + 0.62 %



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