



شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Sunday, March 12<sup>th</sup> 2023

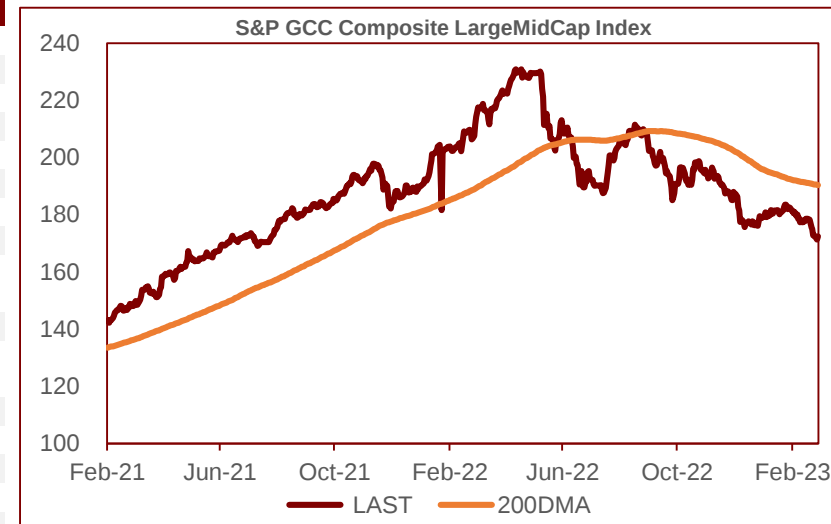




### Market Watch

Sunday, March 12<sup>th</sup> 2023

| Description              | Close     | Day Δ | WTD   | MTD   | QTD    | YTD    | M Cap (in Bn) | PBV  | PE    |
|--------------------------|-----------|-------|-------|-------|--------|--------|---------------|------|-------|
| <b>GCC Markets</b>       |           |       |       |       |        |        |               |      |       |
|                          |           | %     | %     | %     | %      | %      |               |      |       |
| Saudi (TASI)             | 10,383.82 | -0.76 | -0.76 | 2.78  | -0.90  | -0.90  | 10,013 SAR    | 1.65 | 16.33 |
| Qatar (QE Index)         | 10,565.41 | -1.59 | -1.59 | -0.05 | -1.08  | -1.08  | 540 QAR       | 1.34 | 11.51 |
| Dubai (DFMGI)            | 3,385.51  | -0.70 | -0.70 | -1.52 | 1.48   | 1.48   | 488 AED       | 1.18 | 19.03 |
| Abu Dhabi (ADI)          | 9,827.79  | -0.33 | -0.33 | -0.17 | -3.75  | -3.75  | 1,435 AED     | 1.86 | 23.42 |
| Bahrain (BAX)            | 1,910.28  | -0.07 | -0.07 | -1.12 | 0.79   | 0.79   | 20 BHD        | 1.73 | 18.00 |
| MUSCAT SE INDEX          | 4,862.32  | 0.26  | 0.26  | 2.29  | 0.10   | 0.10   | 5 OMR         | 0.97 | 13.25 |
| SP GCC Comp LMC          | 174.91    | -0.96 | -0.96 | 1.44  | -2.16  | -2.16  |               |      |       |
| SP UAE PRICE INDEX       | 134.87    | -0.39 | -0.39 | -1.01 | -1.91  | -1.91  |               |      |       |
| <b>Developed Markets</b> |           |       |       |       |        |        |               |      |       |
| MSCI World Index         | 2,657.41  | -1.25 | -1.25 | -2.11 | 2.10   | 2.10   |               |      |       |
| U.S. (S&P 500)           | 3,861.59  | -1.45 | -1.45 | -2.73 | 0.58   | 0.58   |               |      |       |
| U.K. (FTSE 100)          | 7,748.35  | -1.67 | -1.67 | -1.62 | 3.98   | 3.98   |               |      |       |
| Japan (Topix)            | 1,994.99  | -1.91 | -1.91 | 1.92  | 7.39   | 7.39   |               |      |       |
| <b>Emerging Markets</b>  |           |       |       |       |        |        |               |      |       |
| MSCI EM Index            | 955.28    | -1.35 | -1.35 | -0.91 | -0.12  | -0.12  |               |      |       |
| China (SSE Composite)    | 3,256.83  | -1.40 | -1.40 | -1.51 | 4.56   | 4.56   |               |      |       |
| India (Sensex)           | 59,238.52 | -1.12 | -1.12 | 0.29  | -2.80  | -2.80  |               |      |       |
| <b>Kuwait</b>            |           |       |       |       |        |        |               |      |       |
|                          |           | %     | %     | %     | %      | %      |               |      |       |
| Kuwait All Share Index   | 7,238.46  | -0.62 | -0.62 | -0.08 | -0.74  | -0.74  | 46.82 KWD     | 1.75 | 26.97 |
| Kuwait Premier Index     | 8,079.32  | -0.72 | -0.72 | 0.12  | -0.45  | -0.45  | 36.92 KWD     | 1.75 | 22.98 |
| Kuwait Main Index        | 5,493.77  | -0.13 | -0.13 | -0.99 | -1.84  | -1.84  | 9.90 KWD      | 1.76 | 41.93 |
| NIC 50                   | 9,018.35  | -1.07 | -0.73 | 0.11  | -0.46  | -0.72  | 28.60 KWD     | 1.73 | 21.98 |
| <b>Kuwait Sector</b>     |           |       |       |       |        |        |               |      |       |
| Banking                  | 1,818.43  | -0.73 | -0.73 | 0.47  | 1.37   | 1.37   | 30.61 KWD     | 1.28 | 23.98 |
| Telecom                  | 1,157.86  | -1.04 | -1.04 | -1.16 | -2.00  | -2.00  | 3.55 KWD      | 1.96 | 11.66 |
| Industrials              | 970.33    | -0.85 | -0.85 | -2.03 | -10.06 | -10.06 | 3.41 KWD      | 0.83 | 18.10 |
| Financial services       | 1,211.46  | -0.89 | -0.89 | -1.99 | -3.64  | -3.64  | 3.47 KWD      | 0.65 | 16.76 |
| Real estate              | 1,114.07  | -0.78 | -0.78 | -2.45 | -7.83  | -7.83  | 2.42 KWD      | 0.53 | 21.48 |
| Basic materials          | 848.06    | 0.40  | 0.40  | 0.47  | -1.97  | -1.97  | 0.76 KWD      | 1.28 | 8.21  |
| Health care              | 462.30    | 0.00  | 0.00  | 0.49  | 0.10   | 0.10   | 0.23 KWD      | 2.48 | 13.39 |
| Consumer services        | 472.71    | -1.29 | -1.29 | -1.22 | -1.51  | -1.51  | 0.78 KWD      | 0.92 | 12.46 |
| Insurance                | 1,648.44  | 1.79  | 1.79  | 1.28  | 6.29   | 6.29   | 0.68 KWD      | 0.80 | 10.16 |
| Consumer Disc            | 1,526.93  | 3.74  | 3.74  | 4.83  | 2.70   | 2.70   | 0.14 KWD      | 0.94 | 0.00  |
| Energy                   | 1,059.52  | 2.98  | 2.98  | 4.09  | -6.94  | -6.94  | 0.22 KWD      | 0.54 | 4.28  |
| Technology               | 676.57    | 0.00  | 0.00  | -0.11 | -2.82  | -2.82  | 0.01 KWD      | 0.83 | 0.00  |
| Utilities                | 476.32    | -0.55 | -0.55 | -0.55 | -3.72  | -3.72  | 0.20 KWD      | 1.70 | 13.76 |



### What Move the GCC markets

#### Oil Prices

Oil prices climbed more than 1% on Friday after better-than-expected U.S. employment data, though both benchmarks fell more than 3% on the week on U.S. interest rate hike jitters. Brent rose \$1.19, or 1.5%, to \$82.78 a barrel.

#### Kuwait Market

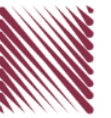
The market closed down today by – 0.62% at 7,238.46 value traded 33.7 million KD, Premier market value traded reached 28.5 million KD down by – 0.72% at 8,079.32.

#### KSA Market

The market closed down today by - 0.76% at 10,383.82.

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



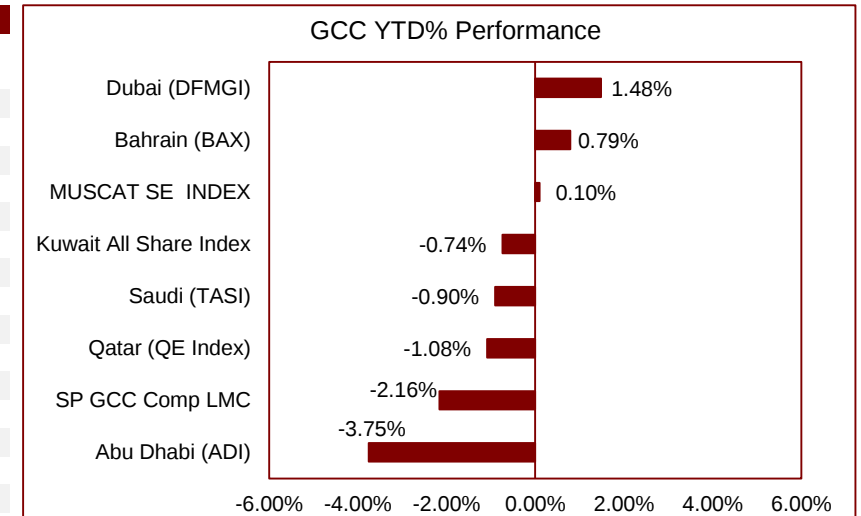
| Description                 | Close | Day Δ | WTD   | MTD   | QTD    | YTD    | M Cap (in Bn) | PBV  | PE    |
|-----------------------------|-------|-------|-------|-------|--------|--------|---------------|------|-------|
| <b>Blue Chip Watch</b>      |       | %     | %     | %     | %      | %      |               |      |       |
| <b>Kuwait</b>               |       |       |       |       |        |        |               |      |       |
| NBK                         | 1.102 | -0.72 | -0.72 | 2.99  | 2.23   | 2.23   | 8.32 KWD      | 2.05 | 27.00 |
| KFH                         | 0.863 | -0.80 | -0.80 | 0.70  | 4.86   | 4.86   | 11.58 KWD     | 1.96 | 32.00 |
| Zain                        | 0.545 | -1.27 | -1.27 | -2.50 | -3.20  | -3.20  | 2.36 KWD      | 1.96 | 11.66 |
| BOUBYAN BANK                | 0.727 | -1.49 | -1.49 | -4.97 | -8.90  | -8.90  | 2.72 KWD      | 2.86 | 34.00 |
| Agility                     | 0.589 | -1.51 | -1.51 | -2.32 | -18.19 | -18.19 | 1.58 KWD      | 1.09 | 38.50 |
| <b>Saudi Arabia</b>         |       |       |       |       |        |        |               |      |       |
| ARAMCO                      | 32.80 | 0.00  | 0.00  | 3.14  | 2.18   | 2.18   | 7,216.00 SAR  | 5.20 | 12.53 |
| SABIC                       | 91.00 | 0.66  | 0.66  | 2.82  | 1.79   | 1.79   | 273.00 SAR    | 1.47 | 35.00 |
| STC                         | 37.80 | -1.05 | -1.05 | 7.54  | 3.28   | 3.28   | 189.00 SAR    | 2.56 | 15.67 |
| AL-RAJHI BANK               | 73.70 | -1.73 | -1.73 | 4.84  | -1.99  | -1.99  | 294.80 SAR    | 2.94 | 19.23 |
| NCB                         | 45.90 | -1.18 | -1.18 | -2.86 | -9.11  | -9.11  | 205.54 SAR    | 1.23 | 11.34 |
| <b>United Arab Emirates</b> |       |       |       |       |        |        |               |      |       |
| ETISALAT.AD                 | 25.24 | -0.63 | -0.63 | -1.02 | 10.41  | 10.41  | 206.60 AED    | 5.10 | 21.10 |
| FAB.AD                      | 14.10 | 0.00  | 0.00  | 0.14  | -17.54 | -17.54 | 155.76 AED    | 1.35 | 11.94 |
| EMIRATES NBD                | 12.90 | 0.78  | 0.78  | -5.15 | -0.77  | -0.77  | 81.48 AED     | 0.87 | 6.52  |
| DB ISLAMIC BK               | 5.70  | 0.00  | 0.00  | -0.70 | 0.00   | 0.00   | 41.27 AED     | 1.00 | 8.16  |
| EMAAR PROPERT               | 5.49  | -0.18 | -0.18 | -1.96 | -6.31  | -6.31  | 48.52 AED     | 0.69 | 6.57  |
| <b>Qatar</b>                |       |       |       |       |        |        |               |      |       |
| QNB                         | 16.47 | -0.36 | -0.36 | -2.26 | -8.50  | -8.50  | 152.88 QAR    | 1.45 | 11.46 |
| INDUSTRIES QAT              | 14.23 | -0.70 | -0.70 | 2.23  | 11.09  | 11.09  | 86.52 QAR     | 2.05 | 9.77  |
| QA ISLAMIC BK               | 18.66 | -3.76 | -3.76 | 0.32  | 0.54   | 0.54   | 44.31 QAR     | 1.62 | 11.55 |
| MASRAF AL RAYA              | 2.74  | -1.86 | -1.86 | 1.48  | -13.59 | -13.59 | 25.61 QAR     | 1.06 | 17.39 |
| MESAIEED PETRO              | 2.17  | -2.25 | -2.25 | 3.28  | 2.02   | 2.02   | 27.40 QAR     | 1.57 | 15.42 |
| <b>OMAN</b>                 |       |       |       |       |        |        |               |      |       |
| BANK MUSCAT                 | 0.288 | 0.00  | 0.00  | -1.37 | 4.73   | 4.73   | 2.16 OMR      | 0.97 | 8.33  |
| OMANTEL                     | 1.030 | 15.99 | 1.98  | 7.29  | 11.96  | 11.96  | 0.77 OMR      | 1.31 | 7.69  |
| BANK DHOFAR                 | 0.155 | 0.00  | 0.00  | 1.97  | -11.43 | -11.43 | 0.46 QAR      | 0.65 | 14.93 |
| NAT BANK OF OMAN            | 0.276 | 0.00  | 0.00  | 3.76  | -4.50  | -4.50  | 0.45 QAR      | 0.70 | 12.71 |
| OMINVEST                    | 0.490 | 2.08  | 2.08  | 7.46  | 16.67  | 16.67  | 0.33 QAR      | 0.97 | 6.85  |

| Foreign Holding |        |        |       |       |         |       |        |        |       |       |
|-----------------|--------|--------|-------|-------|---------|-------|--------|--------|-------|-------|
| Date            | NBK    | GBK    | CBK   | ABK   | MUTAHED | KIB   | BURG   | KFH    | BOUB  | WARBA |
| 1-March 23      | 24.76% | 16.62% | 0.06% | 1.33% | 0.42%   | 4.46% | 17.72% | 15.18% | 5.84% | 5.17% |
| 8-March 23      | 24.78% | 16.61% | 0.06% | 1.36% | 0.42%   | 4.69% | 17.70% | 15.06% | 5.84% | 5.25% |

### End of Report

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### Leading Sector, Security Performance

#### Kuwait

The market is down today by -0.62 %The leading sector bottom performance indices today are Consumer services -1.29 % Telecom -1.04 % Financial services -0.89 % respectively

#### KSA

Saudi Armco flat performance today, SABIC has a positive performance today by + 0.66 %, STC has a negative performance today by -1.05 %, Al Rajhi Bank has a negative performance today by -1.73 %

#### U.A.E

ETISALAT .AD have negative performance today by -0.63 %, FAB.AD flat performance today



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