



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, February 13th 2023





Market Watch

Monday, February 13, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,519.74	1.03	1.03	-2.53	0.39	0.39	10,087 SAR	1.71	14.68
Qatar (QE Index)	10,391.34	-0.32	-0.32	-4.95	-2.71	-2.71	523 QAR	1.30	11.44
Dubai (DFMGI)	3,469.77	0.46	0.70	5.04	4.01	4.01	500 AED	1.20	18.49
Abu Dhabi (ADI)	10,010.22	-0.13	0.00	2.02	-1.97	-1.97	1,435 AED	1.92	20.95
Bahrain (BAX)	1,935.17	-0.09	-0.09	0.36	2.11	2.11	20 BHD	1.57	15.61
MUSCAT SE INDEX	4,739.65	-0.61	-0.61	0.77	-2.43	-2.43	5 OMR	0.95	13.25
SP GCC Comp LMC	178.08	0.36	0.42	-1.84	-0.39	-0.39			
SP UAE PRICE INDEX	139.37	-0.21	0.13	4.09	1.37	1.37			

Developed Markets

MSCI World Index	2,810.04	0.94	0.70	0.90	7.97	7.97			
U.S. (S&P 500)	4,137.29	1.14	1.37	1.49	7.76	7.76			
U.K. (FTSE 100)	7,947.60	0.83	0.46	2.26	6.65	6.65			
Japan (Topix)	1,977.67	-0.47	-0.37	0.12	4.54	4.54			

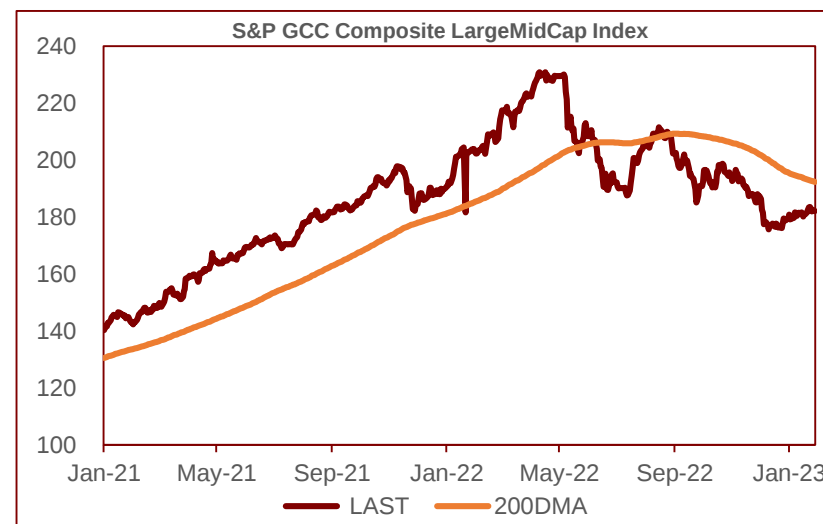
Emerging Markets

MSCI EM Index	1,013.53	-0.01	-1.07	-1.74	5.98	5.98			
China (SSE Composite)	3,284.16	0.72	0.42	0.88	6.31	6.31			
India (Sensex)	60,431.84	-0.41	-0.62	1.48	-0.67	-0.67			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,336.53	-0.05	-0.05	0.81	0.61	0.61	47.48 KWD	1.76	29.05
Kuwait Premier Index	8,200.21	-0.02	-0.02	1.42	1.04	1.04	37.53 KWD	1.79	23.62
Kuwait Main Index	5,532.70	-0.19	-0.19	-1.61	-1.15	-1.15	9.95 KWD	1.63	49.59
NIC 50	9,159.05	-0.29	-0.03	1.41	1.03	7.47	28.60 KWD	1.77	22.62

Kuwait Sector

Banking	1,844.26	0.05	0.05	1.71	2.81	2.81	31.07 KWD	1.33	24.62
Telecom	1,147.13	-0.43	-0.43	-4.22	-2.91	-2.91	3.52 KWD	1.97	11.71
Industrials	987.56	-0.47	-0.47	0.79	-8.46	-8.46	3.47 KWD	0.80	18.29
Financial services	1,259.17	-0.07	-0.07	0.43	0.15	0.15	3.59 KWD	0.69	16.57
Real estate	1,166.60	-0.66	-0.66	-1.87	-3.48	-3.48	2.54 KWD	0.55	22.18
Basic materials	854.75	-0.20	-0.20	-0.97	-1.20	-1.20	0.76 KWD	1.28	8.27
Health care	447.32	0.00	0.00	0.82	-3.15	-3.15	0.22 KWD	2.35	13.55
Consumer services	470.01	-0.72	-0.72	-2.00	-2.07	-2.07	0.72 KWD	0.95	11.34
Insurance	1,571.25	-0.18	-0.18	1.13	1.32	1.32	0.65 KWD	0.83	9.50
Consumer Disc	1,431.26	1.42	1.42	1.96	-3.74	-3.74	0.14 KWD	0.95	0.00
Energy	1,093.98	0.86	0.86	-0.41	-3.91	-3.91	0.23 KWD	0.59	4.74
Technology	720.22	-1.88	-1.88	3.56	3.45	3.45	0.01 KWD	0.88	0.00
Utilities	481.58	1.10	1.10	0.55	-2.66	-2.66	0.20 KWD	1.69	15.05



What Move the GCC markets

Oil Prices

Oil prices slumped on Monday as investors focused on short-term demand concerns ahead of key U.S. inflation data. Brent crude futures fell \$1.15, or 1.3%, to \$85.24 a barrel after a 2.2% gain on Friday.

Kuwait Market

The market closed down today by – 0.05% at 7,336.53 value traded 37.7 million KD, Premier market value traded reached 33.2 million KD down by – 0.02% at 8,200.21.

KSA Market

The market closed up today by + 1.03% at 10,519.74.



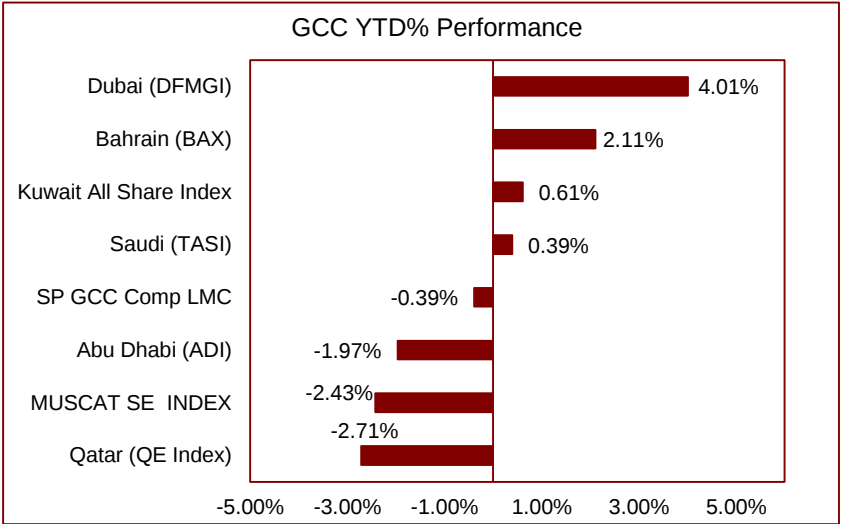
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.100	-0.90	-0.90	0.27	2.04	2.04	8.31 KWD	2.05	27.00
KFH	0.879	1.38	1.38	5.14	6.80	6.80	11.81 KWD	2.00	32.00
Zain	0.547	-0.73	-0.73	-1.26	-2.84	-2.84	2.37 KWD	1.97	11.71
BOUBYAN BANK	0.762	-1.80	-1.80	-2.81	-4.51	-4.51	2.85 KWD	3.00	34.00
Agility	0.602	-1.31	-1.31	1.86	-16.39	-16.39	1.61 KWD	1.11	39.35
Saudi Arabia									
ARAMCO	33.00	1.85	1.85	0.15	2.80	2.80	7,254.58 SAR	5.23	12.40
SABIC	93.10	0.87	0.87	0.43	4.14	4.14	279.09 SAR	1.53	35.00
STC	36.40	0.28	0.28	-1.36	-0.55	-0.55	181.86 SAR	2.48	14.97
AL-RAJHI BANK	76.70	-0.78	-0.78	-6.46	1.99	1.99	306.57 SAR	3.06	19.61
NCB	49.00	1.24	1.24	3.59	-2.97	-2.97	219.26 SAR	1.31	11.79
United Arab Emirates									
ETISALAT.AD	27.20	0.00	1.19	5.84	18.99	18.99	206.60 AED	5.10	21.10
FAB.AD	14.38	0.14	-0.14	5.74	-15.91	-15.91	158.86 AED	1.38	12.18
EMIRATES NBD	13.60	-1.09	-0.73	5.02	4.62	4.62	85.90 AED	0.92	6.87
DB ISLAMIC BK	5.72	0.70	1.24	3.06	0.35	0.35	41.42 AED	1.00	8.19
EMAAR PROPERT	5.75	0.00	0.52	3.42	-1.88	-1.88	50.82 AED	0.72	6.62
Qatar									
QNB	16.20	-0.49	-0.49	-10.00	-10.00	-10.00	148.89 QAR	1.42	11.13
INDUSTRIES QAT	14.01	-0.07	-0.07	-0.28	9.37	9.37	84.34 QAR	2.02	9.95
QA ISLAMIC BK	18.05	-1.42	-1.42	-8.24	-2.75	-2.75	42.44 QAR	1.56	11.28
MASRAF AL RAYA	2.61	-0.08	-0.08	-4.40	-17.69	-17.69	24.15 QAR	1.01	16.57
MESAIEED PETRO	2.05	1.28	1.28	-4.65	-3.62	-3.62	25.63 QAR	1.50	13.61
OMAN									
BANK MUSCAT	0.286	-0.35	-0.35	3.62	4.00	4.00	2.15 OMR	0.96	8.33
OMANTEL	0.968	9.01	0.00	2.11	5.22	5.22	0.73 OMR	1.23	7.69
BANK DHOFAR	0.153	0.00	0.00	2.00	-12.57	-12.57	0.46 QAR	0.64	14.93
NAT BANK OF OMAN	0.266	-1.48	-1.48	-2.92	-7.96	-7.96	0.43 QAR	0.67	12.71
OMINVEST	0.430	0.00	0.00	2.87	2.38	2.38	0.29 QAR	0.86	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
1-Feb 23	24.69%	16.82%	0.06%	1.35%	0.38%	4.47%	17.66%	15.20%	5.86%	5.19%
8-Feb 23	24.74%	16.79%	0.06%	1.35%	0.39%	4.46%	17.66%	15.22%	5.87%	5.19%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.05 %The leading sector bottom performance indices today are Technology -1.88 % Consumer services -0.72 % Real estate -0.66 % respectively

KSA

Saudi Armco has a positive performance today by + 1.85 %, SABIC has a positive performance today by + 0.87 %, STC has a positive performance today by + 0.28 %, Al Rajhi Bank have negative performance today by -0.78 %

U.A.E

ETISALAT .AD flat performance today 0 %, FAB.AD has a positive performance today by + 0.14 %



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