



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, June 13th 2023



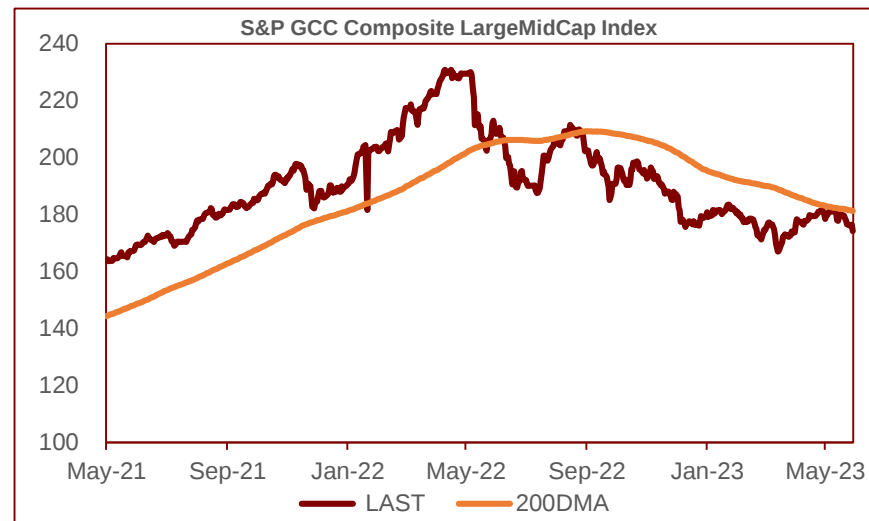


Market Watch

Tuesday, June 13, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	11,413.82	-0.08	0.15	3.63	7.78	8.93	10,862 SAR	2.11	18.39
Qatar (QE Index)	10,215.61	0.64	-0.41	0.60	0.03	-4.36	543 QAR	1.37	11.32
Dubai (DFMGI)	3,712.68	0.29	0.68	3.80	8.98	11.29	528 AED	1.42	19.10
Abu Dhabi (ADI)	9,351.25	-0.31	-0.01	-0.59	-0.84	-8.42	1,435 AED	1.79	20.73
Bahrain (BAX)	1,954.59	0.06	0.01	-0.45	3.60	3.13	20 BHD	6.38	18.00
MUSCAT SE INDEX	4,696.64	-0.02	0.81	1.52	-3.42	-3.31	5 OMR	1.00	13.25
SP GCC Comp LMC	178.23	-0.17	0.00	2.30	2.63	-0.30			
SP UAE PRICE INDEX	131.37	-0.27	0.27	0.35	2.66	-4.45			
Developed Markets									
MSCI World Index	2,929.68	0.81	1.65	4.61	4.95	12.56			
U.S. (S&P 500)	4,369.01	0.69	1.75	4.53	6.32	13.79			
U.K. (FTSE 100)	7,594.78	0.32	-0.07	2.00	-0.48	1.92			
Japan (Topix)	2,264.79	1.16	3.34	6.30	13.04	19.72			
Emerging Markets									
MSCI EM Index	1,013.25	1.01	1.93	5.71	2.32	5.95			
China (SSE Composite)	3,233.67	0.15	0.63	0.91	-1.20	4.67			
India (Sensex)	63,143.16	0.67	0.47	0.83	7.04	3.78			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	6,925.30	0.27	0.97	1.89	-1.78	-5.03	44.82 KWD	1.68	17.92
Kuwait Premier Index	7,688.36	0.24	1.10	2.58	-1.71	-5.27	35.00 KWD	1.64	17.78
Kuwait Main Index	5,396.30	0.39	0.46	-0.82	-1.90	-3.58	9.82 KWD	1.85	18.44
NIC 50	8,739.46	0.21	1.09	2.57	-1.72	-3.79	28.60 KWD	1.62	16.78
Kuwait Sector									
Banking	1,686.06	0.13	0.68	2.15	-3.81	-6.01	28.42 KWD	1.20	18.78
Telecom	1,094.02	-0.14	0.38	-0.22	-3.38	-7.40	3.36 KWD	1.34	8.70
Industrials	975.29	0.35	0.31	0.81	-1.18	-9.60	3.43 KWD	0.80	19.97
Financial services	1,200.02	0.80	1.61	1.34	0.34	-4.55	3.47 KWD	0.74	19.82
Real estate	1,168.91	1.30	3.93	4.84	8.21	-3.29	2.53 KWD	0.55	21.44
Basic materials	964.73	1.18	3.31	5.01	12.55	11.52	0.83 KWD	1.54	8.55
Health care	455.79	0.00	1.69	-0.66	0.07	-1.31	0.24 KWD	0.96	6.69
Consumer services	539.35	2.00	2.75	7.20	21.13	12.38	0.78 KWD	0.84	14.30
Insurance	2,110.36	-0.38	0.08	-1.21	10.49	36.08	0.87 KWD	0.76	10.07
Consumer Disc	1,581.22	0.60	2.26	2.68	8.16	6.35	0.16 KWD	1.00	0.00
Energy	1,003.18	-0.98	0.11	1.33	0.53	-11.89	0.21 KWD	0.74	4.28
Technology	625.65	-3.91	0.00	-9.38	-1.60	-10.14	0.01 KWD	0.78	0.00
Utilities	481.58	0.00	1.10	-0.54	3.39	-2.66	0.20 KWD	1.84	14.99



What Move the GCC markets

Oil Prices

Oil prices climbed 3% on Tuesday, recovering from steep losses the previous session, after China's central bank lowered a short-term lending rate for the first time in 10 months. The rate cut, aimed at adding momentum to a hesitant post-pandemic recovery in the world's second-largest economy and biggest crude importer, is likely increase oil demand. Brent crude futures climbed \$2.22, or 3%, to \$74.06 a barrel.

Kuwait Market

The market closed up today by + 0.27% at 6,925.3 value traded 43.9 million KD, Premier market value traded reached 32.2 million KD up + 0.24% at 7,688.36.

KSA Market

The market closed down today by – 0.08% at 11,413.82.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



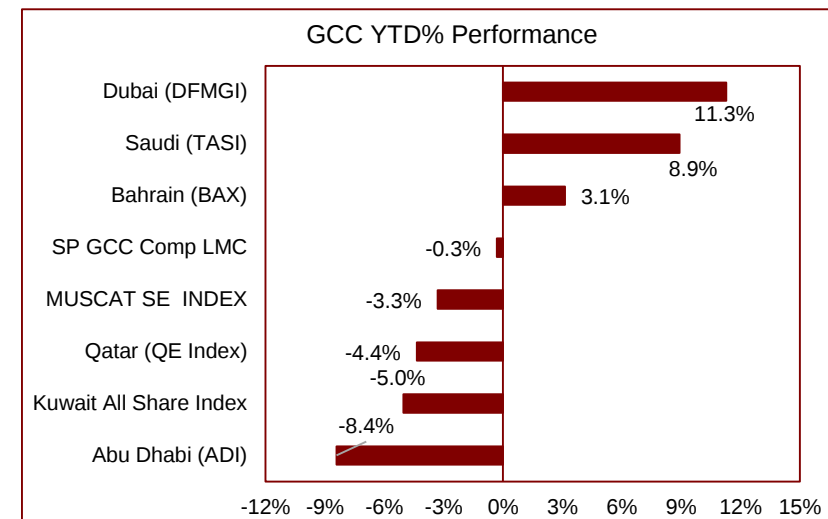
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.934	-0.21	0.21	1.52	-7.13	-9.03	7.41 KWD	1.88	27.00
KFH	0.731	0.00	0.69	3.39	-2.65	-2.30	10.79 KWD	1.86	32.00
Zain	0.510	-0.20	-0.20	-1.92	-5.56	-9.41	2.21 KWD	1.72	10.87
BOUBAYAN BANK	0.639	1.43	3.57	6.50	5.34	-15.12	2.53 KWD	2.85	34.00
Agility	0.615	0.49	0.49	0.65	-0.97	-14.58	1.65 KWD	0.86	22.17
Saudi Arabia									
ARAMCO	32.20	-0.31	-0.77	2.22	9.66	10.34	7,792.40 SAR	5.22	13.90
SABIC	88.70	-0.67	-0.34	0.57	-1.77	-0.78	266.10 SAR	1.42	35.00
STC	43.10	0.23	-0.46	-0.35	7.62	17.76	215.50 SAR	2.88	17.54
AL-RAJHI BANK	73.20	-0.41	-0.27	3.54	-0.41	-2.66	292.80 SAR	2.95	17.13
NCB	37.00	-0.67	-2.12	0.27	8.13	-1.83	222.00 SAR	1.29	12.02
United Arab Emirates									
ETISALAT.AD	22.10	-1.34	-1.43	-4.25	0.18	-3.32	206.60 AED	5.10	21.10
FAB.AD	12.86	-1.08	0.16	1.26	-0.16	-24.80	142.08 AED	1.27	12.11
EMIRATES NBD	14.35	0.70	2.50	5.13	9.13	10.38	90.65 AED	0.95	5.42
DB ISLAMIC BK	5.38	-0.55	1.13	2.28	2.87	-5.61	38.96 AED	0.96	7.48
EMAAR PROPERT	6.08	-0.16	0.00	-1.14	8.57	3.75	53.74 AED	0.75	6.41
Qatar									
QNB	16.12	1.38	0.12	0.69	0.31	-10.44	148.89 QAR	1.46	10.64
INDUSTRIES QAT	11.51	-0.78	-2.13	-3.92	-11.46	-10.15	69.64 QAR	1.91	9.57
QA ISLAMIC BK	17.90	1.13	0.28	2.17	0.67	-3.56	42.30 QAR	1.59	10.94
MASRAF AL RAYA	2.61	0.19	-0.15	2.27	-11.74	-17.75	24.25 QAR	1.03	19.83
MESAIEED PETRO	1.98	0.51	-1.49	0.56	3.13	-6.91	24.88 QAR	1.53	15.62
OMAN									
BANK MUSCAT	0.266	-0.37	-0.37	1.53	-3.27	-3.27	2.00 OMR	0.92	8.33
OMANTEL	0.976	9.91	0.41	1.24	-11.27	6.09	0.73 OMR	1.20	7.69
BANK DHOFAR	0.175	0.00	1.16	0.00	9.38	0.00	0.52 QAR	0.74	14.93
NAT BANK OF OMAN	0.280	0.00	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 + 0.27 %The leading sector best performance indices today are Consumer services 2 % Real estate 1.3 % Basic materials 1.18 % respectively

KSA

Saudi Armco have negative performance today by -0.31 %, SABIC have negative performance today by -0.67 %. STC has a positive performance today by + 0.23 %, Al Rajhi Bank have negative performance today by -0.41 %

U.A.E

ETISALAT .AD have negative performance today by -1.34 %, FAB.AD have negative performance today by -1.08 %



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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