



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, March 13th 2023



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

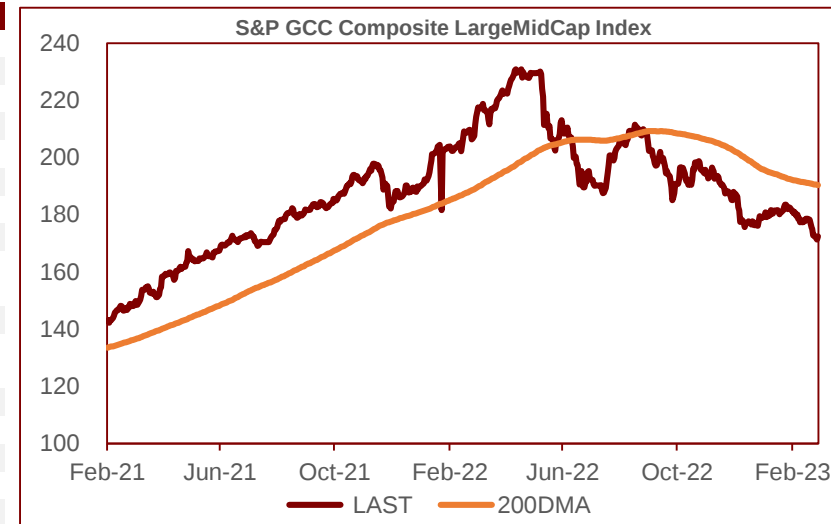


Market Watch

Monday, March 13th 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,305.09	-0.76	-1.51	2.00	-1.65	-1.65	10,022 SAR	1.67	16.33
Qatar (QE Index)	10,408.42	-1.49	-3.06	-1.54	-2.55	-2.55	525 QAR	1.34	11.22
Dubai (DFMGI)	3,351.88	-0.92	-1.62	-2.43	0.55	0.55	484 AED	1.17	18.97
Abu Dhabi (ADI)	9,749.02	-0.71	-1.04	-0.88	-4.44	-4.44	1,435 AED	1.85	23.37
Bahrain (BAX)	1,909.25	-0.05	-0.13	-1.17	0.74	0.74	20 BHD	1.73	18.00
MUSCAT SE INDEX	4,898.97	0.65	0.92	2.96	0.75	0.75	5 OMR	0.96	13.25
SP GCC Comp LMC	172.92	-1.14	-2.09	0.29	-3.28	-3.28			
SP UAE PRICE INDEX	133.08	-1.32	-1.71	-2.33	-3.21	-3.21			
Developed Markets									
MSCI World Index	2,643.64	-0.52	-1.77	-2.61	1.57	1.57			
U.S. (S&P 500)	3,855.76	-0.15	-1.60	-2.88	0.42	0.42			
U.K. (FTSE 100)	7,548.63	-2.58	-4.20	-4.16	1.30	1.30			
Japan (Topix)	1,947.54	-1.51	-3.38	0.39	5.78	5.78			
Emerging Markets									
MSCI EM Index	961.50	0.65	-0.71	-0.26	0.54	0.54			
China (SSE Composite)	3,247.80	1.20	-0.23	-0.33	5.81	5.81			
India (Sensex)	57,937.80	-1.52	-2.62	-1.23	-4.28	-4.28			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,209.36	-0.29	-0.90	-0.37	-1.02	-1.02	46.67 KWD	1.74	26.76
Kuwait Premier Index	8,054.36	-0.25	-0.97	-0.13	-0.70	-0.70	36.83 KWD	1.74	22.85
Kuwait Main Index	5,448.33	-0.45	-0.58	-1.44	-2.28	-2.28	9.85 KWD	1.72	41.45
NIC 50	8,996.91	-0.24	-0.98	-0.14	-0.71	-0.96	28.60 KWD	1.72	21.85
Kuwait Sector									
Banking	1,810.61	-0.19	-0.92	0.28	1.17	1.17	30.54 KWD	1.28	23.85
Telecom	1,154.43	-0.54	-1.58	-1.69	-2.53	-2.53	3.53 KWD	1.95	11.62
Industrials	970.77	-0.12	-0.97	-2.15	-10.17	-10.17	3.40 KWD	0.81	17.98
Financial services	1,203.21	-0.80	-1.68	-2.78	-4.41	-4.41	3.44 KWD	0.65	16.65
Real estate	1,114.55	0.04	-0.74	-2.41	-7.79	-7.79	2.42 KWD	0.53	21.42
Basic materials	844.83	-0.38	0.02	0.09	-2.34	-2.34	0.76 KWD	1.28	8.17
Health care	462.30	0.00	0.00	0.49	0.10	0.10	0.23 KWD	2.48	13.39
Consumer services	468.25	-0.51	-1.79	-1.72	-2.01	-2.01	0.76 KWD	0.90	12.13
Insurance	1,648.76	-0.06	1.73	1.22	6.23	6.23	0.68 KWD	0.80	10.16
Consumer Disc	1,502.86	-1.62	2.06	3.14	1.03	1.03	0.14 KWD	0.94	0.00
Energy	1,041.79	-1.67	1.26	2.35	-8.50	-8.50	0.22 KWD	0.54	4.28
Technology	643.11	-4.95	-4.95	-5.05	-7.63	-7.63	0.01 KWD	0.79	0.00
Utilities	478.95	0.55	0.00	0.00	-3.19	-3.19	0.20 KWD	1.71	13.84



What Move the GCC markets

Oil Prices

Oil prices slipped in Monday Asian morning trade as concerns about possible further U.S. interest rate hikes continue to rattle investors, though a recovery in Chinese demand and a weaker dollar provided some support. Brent crude futures fell 15 cents, or -0.18%, to \$82.63 per barrel

Kuwait Market

The market closed down today by - 0.29% at 7,209.36 value traded 35.8 million KD, Premier market value traded reached 31.2 million KD down by - 0.25% at 8,054.36.

KSA Market

The market closed down today by - 0.76% at 10,305.09.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



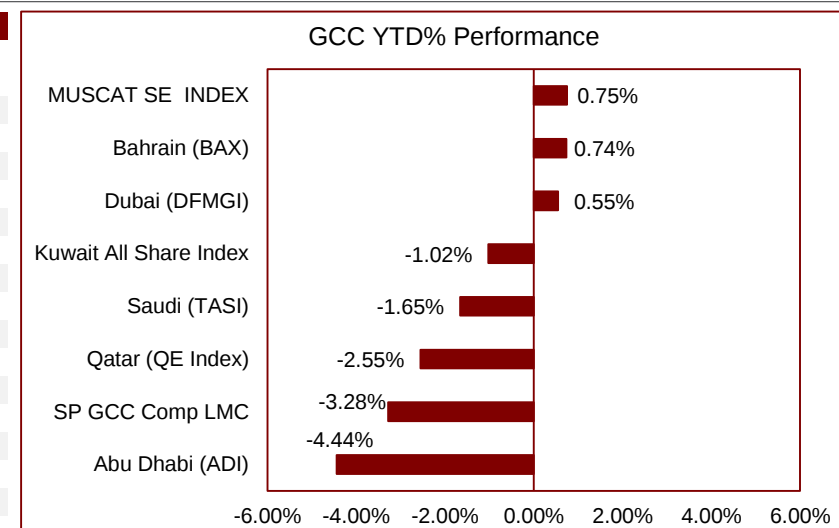
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.106	0.36	-0.36	3.36	2.60	2.60	8.35 KWD	2.06	27.00
KFH	0.862	-0.12	-0.92	0.58	4.74	4.74	11.56 KWD	1.96	32.00
Zain	0.543	-0.37	-1.63	-2.86	-3.55	-3.55	2.35 KWD	1.95	11.62
BOUBYAN BANK	0.710	-2.34	-3.79	-7.19	-11.03	-11.03	2.65 KWD	2.80	34.00
Agility	0.591	0.34	-1.17	-1.99	-17.92	-17.92	1.58 KWD	1.09	38.63
Saudi Arabia									
ARAMCO	32.95	0.46	0.46	3.62	2.65	2.65	7,249.19 SAR	5.22	12.34
SABIC	91.50	0.55	1.22	3.39	2.35	2.35	274.51 SAR	1.48	35.00
STC	37.35	-1.19	-2.23	6.26	2.05	2.05	186.75 SAR	2.53	15.50
AL-RAJHI BANK	72.60	-1.49	-3.20	3.27	-3.46	-3.46	290.41 SAR	2.90	18.90
NCB	44.60	-2.83	-3.98	-5.61	-11.68	-11.68	199.72 SAR	1.19	11.20
United Arab Emirates									
ETISALAT.AD	24.62	-2.46	-3.07	-3.45	7.70	7.70	206.60 AED	5.10	21.10
FAB.AD	14.00	-0.71	-0.71	-0.57	-18.13	-18.13	154.65 AED	1.34	11.86
EMIRATES NBD	12.90	0.00	0.78	-5.15	-0.77	-0.77	81.48 AED	0.87	6.52
DB ISLAMIC BK	5.61	-1.58	-1.58	-2.26	-1.58	-1.58	40.62 AED	0.98	8.03
EMAAR PROPERT	5.33	-2.91	-3.09	-4.82	-9.04	-9.04	47.11 AED	0.67	6.38
Qatar									
QNB	16.01	-2.79	-3.15	-4.99	-11.06	-11.06	147.15 QAR	1.41	11.14
INDUSTRIES QAT	14.25	0.14	-0.56	2.37	11.24	11.24	85.79 QAR	2.05	9.78
QA ISLAMIC BK	17.91	-4.02	-7.63	-3.71	-3.50	-3.50	42.11 QAR	1.55	11.09
MASRAF AL RAYA	2.72	-0.77	-2.61	0.70	-14.25	-14.25	25.16 QAR	1.05	17.25
MESAIEED PETRO	2.07	-4.70	-6.85	-1.57	-2.77	-2.77	25.85 QAR	1.49	14.70
OMAN									
BANK MUSCAT	0.289	0.35	0.35	-1.03	5.09	5.09	2.17 OMR	0.97	8.33
OMANTEL	1.015	14.30	0.50	5.73	10.33	10.33	0.76 OMR	1.29	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	0.275	-0.36	-0.36	3.38	-4.84	-4.84	0.45 QAR	0.70	12.71
OMINVEST	0.500	2.04	4.17	9.65	19.05	19.05	0.33 QAR	0.99	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

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed and others authorized to receive it.

Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.29 %The leading sector bottom performance indices today are Technology -4.95 % Energy -1.67 % Consumer Disc -1.62 % respectively

KSA

Saudi Armco has a positive performance today by + 0.46 %, SABIC has a positive performance today by + 0.55 %, STC has a negative performance today by -1.19 %, Al Rajhi Bank has a negative performance today by -1.49 %

U.A.E

ETISALAT .AD has a negative performance today by -2.46 %, FAB.AD has a negative performance today by -0.71 %



شركة الاستثمار الوطنية
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