



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, February 14th 2023

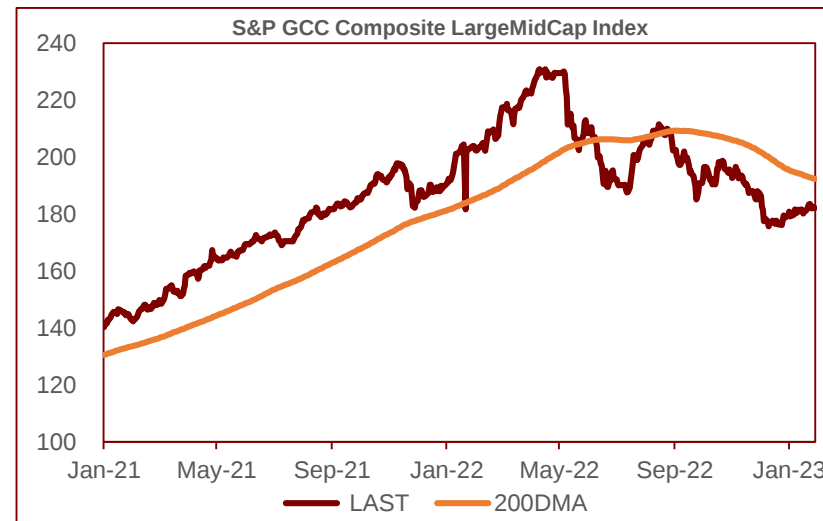




Market Watch

Tuesday, February 14, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,496.59	-0.22	0.81	-2.74	0.17	0.17	10,089 SAR	1.70	14.89
Qatar (QE Index)	10,391.34	0.00	-0.32	-4.95	-2.71	-2.71	523 QAR	1.30	11.92
Dubai (DFMGI)	3,459.10	-0.31	0.39	4.72	3.69	3.69	499 AED	1.20	18.53
Abu Dhabi (ADI)	10,020.37	0.10	0.10	2.13	-1.87	-1.87	1,435 AED	1.92	27.05
Bahrain (BAX)	1,937.86	0.14	0.05	0.50	2.25	2.25	20 BHD	1.57	18.00
MUSCAT SE INDEX	4,618.69	-2.55	-3.14	-1.80	-4.92	-4.92	5 OMR	0.93	13.25
SP GCC Comp LMC	177.70	-0.22	0.20	-2.05	-0.60	-0.60			
SP UAE PRICE INDEX	139.43	0.04	0.17	4.13	1.40	1.40			
Developed Markets									
MSCI World Index	2,812.53	0.09	0.79	0.99	8.06	8.06			
U.S. (S&P 500)	4,136.13	-0.03	1.34	1.46	7.73	7.73			
U.K. (FTSE 100)	7,953.85	0.08	0.54	2.34	6.74	6.74			
Japan (Topix)	1,993.09	0.78	0.41	0.90	5.36	5.36			
Emerging Markets									
MSCI EM Index	1,014.49	0.09	-0.98	-1.65	6.08	6.08			
China (SSE Composite)	3,293.28	0.28	0.70	1.16	6.60	6.60			
India (Sensex)	61,032.26	0.99	0.37	2.49	0.31	0.31			
Kuwait									
Kuwait All Share Index	7,330.43	-0.08	-0.13	0.73	0.53	0.53	47.40 KWD	1.75	28.53
Kuwait Premier Index	8,189.77	-0.13	-0.14	1.29	0.91	0.91	37.46 KWD	1.78	23.53
Kuwait Main Index	5,539.38	0.12	-0.07	-1.49	-1.03	-1.03	9.94 KWD	1.63	47.43
NIC 50	9,159.05	0.00	-0.15	1.28	0.90	7.47	28.60 KWD	1.76	22.53
Kuwait Sector									
Banking	1,840.73	-0.19	-0.14	1.51	2.61	2.61	31.00 KWD	1.33	24.53
Telecom	1,149.74	0.23	-0.20	-4.00	-2.68	-2.68	3.53 KWD	1.98	11.77
Industrials	994.49	0.70	0.23	1.49	-7.82	-7.82	3.49 KWD	0.78	18.26
Financial services	1,260.37	0.10	0.02	0.52	0.25	0.25	3.58 KWD	0.69	16.64
Real estate	1,158.19	-0.72	-1.38	-2.58	-4.18	-4.18	2.52 KWD	0.55	22.07
Basic materials	855.95	0.14	-0.06	-0.83	-1.06	-1.06	0.76 KWD	1.28	8.28
Health care	447.32	0.00	0.00	0.82	-3.15	-3.15	0.22 KWD	2.35	13.55
Consumer services	470.35	0.07	-0.65	-1.93	-2.00	-2.00	0.72 KWD	0.94	11.28
Insurance	1,570.71	-0.03	-0.22	1.10	1.28	1.28	0.65 KWD	0.83	9.50
Consumer Disc	1,429.88	-0.10	1.33	1.86	-3.83	-3.83	0.14 KWD	0.94	0.00
Energy	1,096.25	0.21	1.07	-0.20	-3.71	-3.71	0.23 KWD	0.59	4.78
Technology	720.22	0.00	-1.88	3.56	3.45	3.45	0.01 KWD	0.88	0.00
Utilities	486.84	1.09	2.21	1.65	-1.60	-1.60	0.20 KWD	1.71	15.21



What Move the GCC markets

Oil Prices

Oil prices dipped on Tuesday after the U.S. government said it would release more crude from its Strategic Petroleum Reserve, while traders look out for U.S. inflation data for further queues. Brent crude futures fell 80 cents, or 0.9%, to \$85.81 per barrel,

Kuwait Market

The market closed down today by – 0.08% at 7,330.43 value traded 39.3 million KD, Premier market value traded reached 33.4 million KD down by – 0.13% at 8,189.77.

KSA Market

The market closed down today by - 0.22% at 10,496.59.

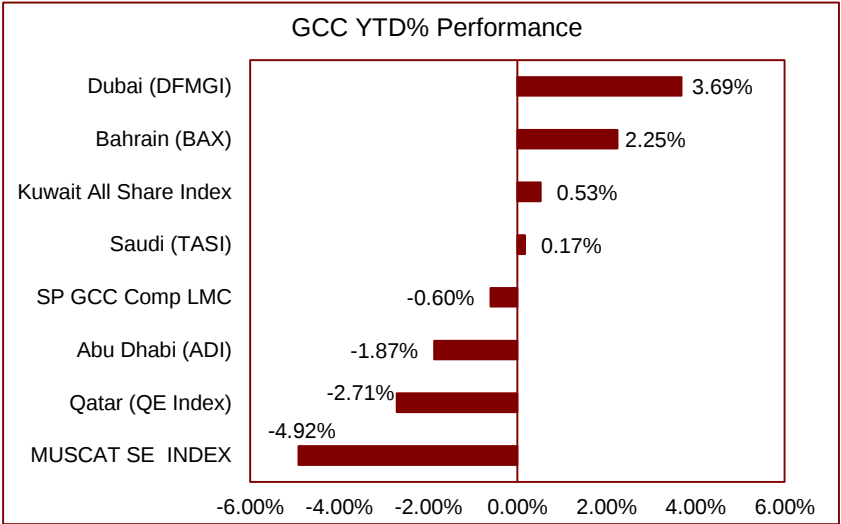


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.100	0.00	-0.90	0.27	2.04	2.04	8.31 KWD	2.05	27.00
KFH	0.876	-0.34	1.04	4.78	6.44	6.44	11.76 KWD	1.99	32.00
Zain	0.550	0.55	-0.18	-0.72	-2.31	-2.31	2.38 KWD	1.98	11.77
BOUBYAN BANK	0.753	-1.18	-2.96	-3.95	-5.64	-5.64	2.82 KWD	2.97	34.00
Agility	0.605	0.50	-0.82	2.37	-15.97	-15.97	1.62 KWD	1.12	39.54
Saudi Arabia									
ARAMCO	32.95	-0.15	1.70	0.00	2.65	2.65	7,253.06 SAR	5.22	12.61
SABIC	94.50	1.50	2.38	1.94	5.70	5.70	283.66 SAR	1.55	35.00
STC	36.40	0.00	0.28	-1.36	-0.55	-0.55	182.10 SAR	2.48	15.11
AL-RAJHI BANK	76.30	-0.52	-1.29	-6.95	1.46	1.46	305.37 SAR	3.05	19.67
NCB	48.20	-1.63	-0.41	1.90	-4.55	-4.55	215.96 SAR	1.29	11.96
United Arab Emirates									
ETISALAT.AD	27.18	-0.07	1.12	5.76	18.90	18.90	206.60 AED	5.10	21.10
FAB.AD	14.38	0.00	-0.14	5.74	-15.91	-15.91	158.86 AED	1.38	12.18
EMIRATES NBD	13.60	0.00	-0.73	5.02	4.62	4.62	85.91 AED	0.92	6.87
DB ISLAMIC BK	5.73	0.17	1.42	3.24	0.53	0.53	41.49 AED	1.00	8.20
EMAAR PROPERT	5.77	0.35	0.87	3.78	-1.54	-1.54	51.00 AED	0.72	6.95
Qatar									
QNB	16.20	0.00	-0.49	-10.00	-10.00	-10.00	148.89 QAR	1.42	11.27
INDUSTRIES QAT	14.01	0.00	-0.07	-0.28	9.37	9.37	84.34 QAR	2.02	9.62
QA ISLAMIC BK	18.05	0.00	-1.42	-8.24	-2.75	-2.75	42.44 QAR	1.56	11.17
MASRAF AL RAYA	2.61	0.00	-0.08	-4.40	-17.69	-17.69	24.15 QAR	1.01	16.56
MESAIEED PETRO	2.05	0.00	1.28	-4.65	-3.62	-3.62	25.63 QAR	1.50	13.59
OMAN									
BANK MUSCAT	0.282	-1.40	-1.74	2.17	2.55	2.55	2.12 OMR	0.95	8.33
OMANTEL	0.912	2.70	-5.79	-3.80	-0.87	-0.87	0.68 OMR	1.16	7.69
BANK DHOFAR	0.150	-1.96	-1.96	0.00	-14.29	-14.29	0.45 QAR	0.63	14.93
NAT BANK OF OMAN	0.250	-6.02	-7.41	-8.76	-13.49	-13.49	0.41 QAR	0.63	12.71
OMINVEST	0.420	-2.33	-2.33	0.48	0.00	0.00	0.28 QAR	0.84	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 -0.08 %The leading sector bottom performance indices today are Real estate -0.72 % Banking -0.19 % Consumer Disc -0.1 % respectively

KSA
Saudi Armco has a negative performance today by -0.15 %, SABIC have positive performance today by + 1.50 %, STC flat performance today 0 %, Al Rajhi Bank have negative performance today by -0.52 %

U.A.E
ETISALAT .AD has a negative performance today by -0.07 %, FAB.AD flat performance today



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