



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, May 14th 2023



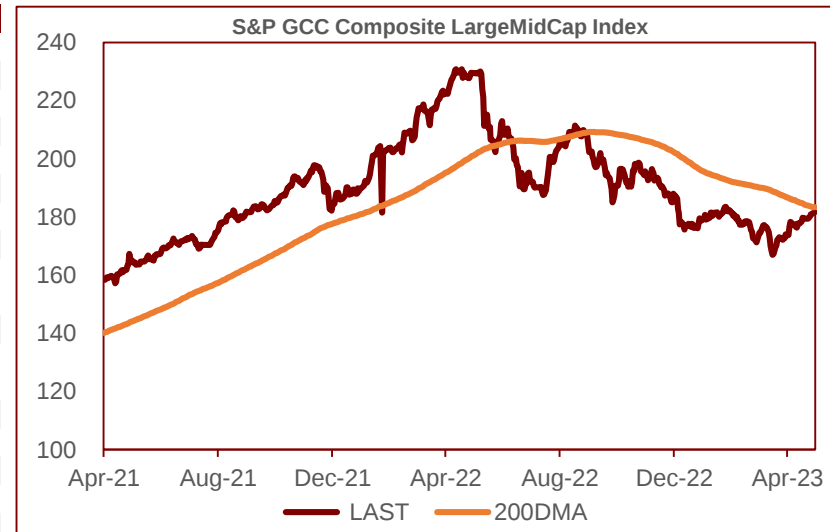


Market Watch

Sunday, May 14, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,348.43	-0.39	3.50	0.36	7.16	8.30	11,203 SAR	1.89	17.72
Qatar (QE Index)	10,669.16	-0.68	5.74	4.79	4.47	-0.11	567 QAR	1.41	11.37
Dubai (DFMGI)	3,559.09	-0.27	2.05	0.40	4.47	6.69	511 AED	1.25	22.87
Abu Dhabi (ADI)	9,634.80	-0.36	0.80	-1.58	2.17	-5.64	1,435 AED	1.75	22.88
Bahrain (BAX)	1,940.83	0.22	3.15	1.91	2.87	2.40	20 BHD	1.61	18.00
MUSCAT SE INDEX	4,704.79	0.82	-2.21	-0.28	-3.26	-3.14	5 OMR	1.01	13.25
SP GCC Comp LMC	180.82	-0.61	1.76	-0.45	4.12	1.14			
SP UAE PRICE INDEX	134.18	-0.72	1.33	-2.40	4.85	-2.41			
Developed Markets									
MSCI World Index	2,809.35	-0.20	-0.70	-0.94	0.64	7.94			
U.S. (S&P 500)	4,124.08	-0.16	-0.53	-1.09	0.36	7.41			
U.K. (FTSE 100)	7,754.62	0.31	-1.13	-1.47	1.61	4.06			
Japan (Topix)	2,096.39	0.64	4.41	1.89	4.64	10.82			
Emerging Markets									
MSCI EM Index	973.00	-0.49	-2.41	-0.41	-1.75	1.74			
China (SSE Composite)	3,272.36	-1.12	-1.39	-1.53	-0.02	5.93			
India (Sensex)	62,027.90	0.20	2.64	1.50	5.15	1.95			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,904.85	-0.61	-1.22	-3.33	-2.07	-5.31	44.68 KWD	1.65	20.10
Kuwait Premier Index	7,614.27	-0.74	-1.86	-3.77	-2.65	-6.18	34.77 KWD	1.63	19.78
Kuwait Main Index	5,529.24	-0.03	1.64	-1.38	0.52	-1.21	9.92 KWD	1.73	21.21
NIC 50	8,864.77	0.00	-1.87	-3.78	-2.66	-2.41	28.60 KWD	1.61	18.78
Kuwait Sector									
Banking	1,697.04	-0.62	-1.64	-3.37	-3.18	-5.40	28.59 KWD	1.23	20.78
Telecom	1,093.67	-1.77	-3.73	-6.89	-3.41	-7.43	3.36 KWD	1.34	8.69
Industrials	980.98	0.19	0.35	-2.44	-0.60	-9.07	3.46 KWD	0.78	22.06
Financial services	1,191.72	-0.62	-1.63	-3.15	-0.36	-5.21	3.43 KWD	0.71	20.06
Real estate	1,102.67	-0.26	-1.36	-3.64	2.08	-8.77	2.39 KWD	0.53	21.00
Basic materials	875.24	0.76	4.55	-1.88	2.11	1.17	0.77 KWD	1.44	4.48
Health care	443.39	-2.40	-4.12	-2.98	-2.66	-4.00	0.22 KWD	0.87	9.39
Consumer services	489.41	-0.27	9.07	7.11	9.91	1.97	0.73 KWD	0.82	13.16
Insurance	2,125.65	0.62	12.09	0.56	11.29	37.07	0.88 KWD	0.77	9.38
Consumer Disc	1,467.53	-0.97	2.71	0.70	0.38	-1.30	0.15 KWD	0.93	0.00
Energy	972.10	-0.19	-2.61	-0.69	-2.58	-14.62	0.20 KWD	0.63	4.49
Technology	582.00	0.00	-6.65	0.00	-8.47	-16.41	0.01 KWD	0.72	0.00
Utilities	473.68	-1.10	2.27	2.86	1.69	-4.26	0.20 KWD	1.81	14.74



What Move the GCC markets

Oil Prices

Oil prices settled more than 1% lower on Friday, falling for the third consecutive week, as the market balanced supply fears against renewed economic concerns in the United States and China. Brent crude futures settled down 81 cents, or 1.1%, to \$74.17.

Kuwait Market

The market closed down today by - 0.61% at 6,904.85 value traded 21.2 million KD, Premier market value traded reached 17.1 million KD down by - 0.74% at 7,614.27.

KSA Market

The market closed down today by - 0.39% at 11,348.43

DAILY MARKETS WRAP,
NIC RESEARCH AND STUDIES DEP



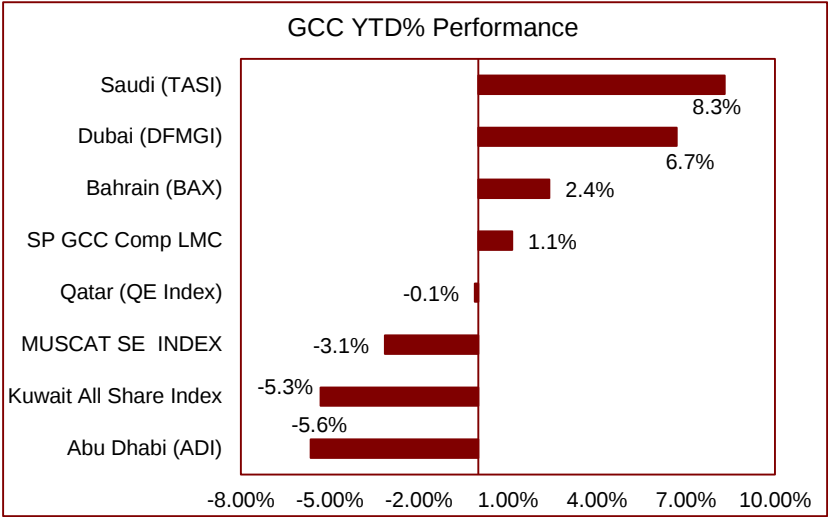
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.950	-1.04	-1.35	-5.38	-5.54	-7.47	7.53 KWD	1.91	27.00
KFH	0.727	-0.55	-1.76	-1.89	-3.18	-2.83	10.73 KWD	1.85	32.00
Zain	0.516	-2.09	-6.18	-8.35	-4.44	-8.35	2.23 KWD	1.74	11.00
BOUBYAN BANK	0.612	-1.29	-2.86	-7.41	0.89	-18.71	2.43 KWD	2.73	34.00
Agility	0.620	0.49	3.68	0.65	-0.16	-13.89	1.66 KWD	0.99	23.89
Saudi Arabia									
ARAMCO	33.70	0.15	12.85	2.12	14.77	15.48	8,155.40 SAR	5.47	14.48
SABIC	92.50	-0.54	1.43	-0.43	2.44	3.47	277.50 SAR	1.48	35.00
STC	44.90	-1.64	5.65	1.13	12.11	22.68	224.50 SAR	3.04	18.63
AL-RAJHI BANK	75.50	-0.13	-0.13	-1.82	2.72	0.40	302.00 SAR	3.04	17.62
NCB	36.45	-0.82	-1.83	-1.13	6.52	-3.29	218.70 SAR	1.27	11.86
United Arab Emirates									
ETISALAT.AD	23.04	-2.21	-1.71	-4.00	4.44	0.79	206.60 AED	5.10	21.10
FAB.AD	13.96	0.00	6.08	-1.55	8.39	-18.36	154.22 AED	1.37	13.15
EMIRATES NBD	14.00	0.00	7.69	-0.71	6.46	7.69	88.43 AED	0.92	5.29
DB ISLAMIC BK	5.41	-0.55	1.88	-2.70	3.44	-5.09	39.17 AED	0.97	7.52
EMAAR PROPERT	6.03	1.17	1.01	1.69	7.68	2.90	53.30 AED	0.77	7.24
Qatar									
QNB	16.62	0.06	7.23	8.63	3.42	-7.67	153.51 QAR	1.51	10.97
INDUSTRIES QAT	13.13	0.00	0.69	1.39	1.00	2.50	79.44 QAR	2.17	10.92
QA ISLAMIC BK	18.54	-1.07	4.33	3.63	4.27	-0.11	43.81 QAR	1.64	11.33
MASRAF AL RAYA	2.74	-2.56	1.71	4.70	-7.28	-13.59	25.48 QAR	1.08	20.84
MESAIEED PETRO	2.05	-1.25	4.27	4.32	6.82	-3.57	25.77 QAR	1.58	16.18
OMAN									
BANK MUSCAT	0.270	1.89	-1.82	-1.10	-1.82	-1.82	2.03 OMR	0.93	8.33
OMANTEL	0.984	10.81	-3.05	-1.60	-10.55	6.96	0.74 OMR	1.16	7.69
BANK DHOFAR	0.172	1.18	7.50	10.97	7.50	-1.71	0.52 QAR	0.72	14.93
NAT BANK OF OMAN	0.280	0.72	-1.41	1.82	4.48	-3.11	0.46 QAR	0.71	12.71
OMINVEST	0.390	0.00	-6.25	-3.94	-21.37	-7.14	0.26 QAR	0.73	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
3-May 23	24.86%	16.06%	0.06%	1.37%	0.44%	4.63%	17.67%	14.19%	6.09%	5.07%
10-May 23	24.78%	16.01%	0.06%	1.35%	0.44%	4.61%	17.66%	14.12%	6.06%	4.98%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.61 %The leading sector bottom performance indices today are Health care -2.4 % Telecom -1.77 % Utilities -1.1 % respectively

KSA

Saudi Armco has a positive performance today by + 0.15 %, SABIC has a negative performance today by -0.53 %, STC has a negative performance today by -1.64 %, Al Rajhi Bank has a negative performance today by -0.13 %

U.A.E

ETISALAT .AD has a negative performance today by -2.21 %, FAB.AD has a flat performance today



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