



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, February 15th 2023

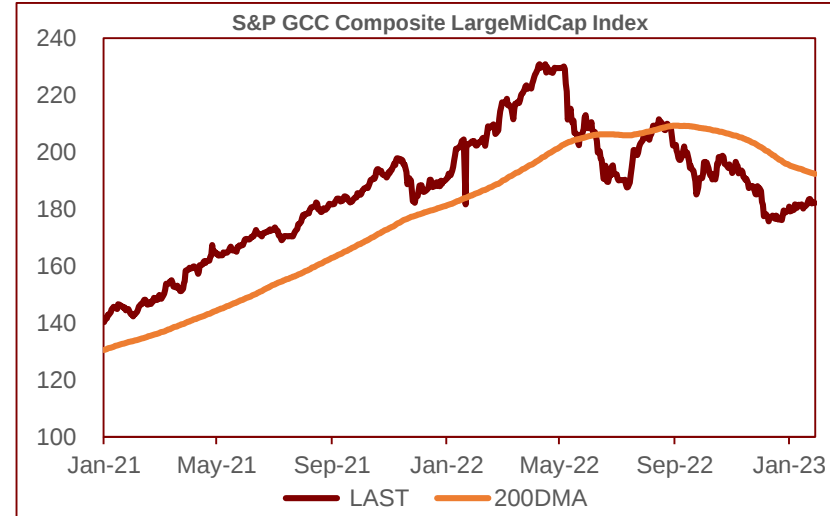




Market Watch

Wednesday, February 15, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,573.05	0.73	1.55	-2.04	0.90	0.90	10,156 SAR	1.70	14.84
Qatar (QE Index)	10,449.93	0.56	0.25	-4.41	-2.16	-2.16	524 QAR	1.32	12.00
Dubai (DFMGI)	3,463.74	0.13	0.52	4.86	3.83	3.83	499 AED	1.20	17.07
Abu Dhabi (ADI)	9,990.10	-0.30	-0.21	1.82	-2.16	-2.16	1,435 AED	1.91	23.11
Bahrain (BAX)	1,936.64	-0.06	-0.02	0.44	2.18	2.18	20 BHD	1.57	18.00
MUSCAT SE INDEX	4,633.18	0.31	-2.84	-1.49	-4.62	-4.62	5 OMR	0.94	13.25
SP GCC Comp LMC	178.62	0.52	0.72	-1.54	-0.09	-0.09			
SP UAE PRICE INDEX	139.02	-0.29	-0.12	3.83	1.11	1.11			
Developed Markets									
MSCI World Index	2,815.45	0.10	0.89	1.09	8.17	8.17			
U.S. (S&P 500)	4,147.60	0.28	1.62	1.74	8.02	8.02			
U.K. (FTSE 100)	7,997.83	0.55	1.10	2.91	7.33	7.33			
Japan (Topix)	1,987.74	-0.27	0.14	0.63	5.08	5.08			
Emerging Markets									
MSCI EM Index	1,004.87	-0.95	-1.92	-2.58	5.07	5.07			
China (SSE Composite)	3,280.49	-0.39	0.31	0.76	6.19	6.19			
India (Sensex)	61,275.09	0.40	0.77	2.90	0.71	0.71			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,370.40	0.55	0.42	1.28	1.07	1.07	47.73 KWD	1.77	28.23
Kuwait Premier Index	8,246.46	0.69	0.55	1.99	1.61	1.61	37.77 KWD	1.81	23.75
Kuwait Main Index	5,532.18	-0.13	-0.20	-1.62	-1.15	-1.15	9.96 KWD	1.63	45.27
NIC 50	9,159.05	0.00	0.54	1.98	1.60	7.47	28.60 KWD	1.79	22.75
Kuwait Sector									
Banking	1,856.68	0.87	0.72	2.39	3.50	3.50	31.30 KWD	1.33	24.75
Telecom	1,148.48	-0.11	-0.31	-4.10	-2.79	-2.79	3.53 KWD	1.98	11.75
Industrials	995.24	0.08	0.31	1.57	-7.75	-7.75	3.50 KWD	0.78	18.24
Financial services	1,260.37	0.00	0.02	0.52	0.25	0.25	3.58 KWD	0.69	16.72
Real estate	1,152.72	-0.47	-1.85	-3.04	-4.63	-4.63	2.51 KWD	0.55	22.02
Basic materials	855.01	-0.11	-0.17	-0.94	-1.17	-1.17	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	472.76	0.51	-0.14	-1.43	-1.50	-1.50	0.72 KWD	0.94	11.14
Insurance	1,568.58	-0.14	-0.35	0.96	1.15	1.15	0.65 KWD	0.83	9.50
Consumer Disc	1,433.46	0.25	1.58	2.12	-3.59	-3.59	0.14 KWD	0.95	0.00
Energy	1,095.62	-0.06	1.01	-0.26	-3.77	-3.77	0.23 KWD	0.57	4.86
Technology	720.22	0.00	-1.88	3.56	3.45	3.45	0.01 KWD	0.88	0.00
Utilities	486.84	0.00	2.21	1.65	-1.60	-1.60	0.20 KWD	1.71	15.21



What Move the GCC markets

Oil Prices

Oil dropped for a second day on Wednesday, as an industry report pointed to ample supplies in the United States and anticipation of further interest rate hikes sparked concerns over weaker fuel demand and the economic outlook, Brent crude futures slid 81 cents, or 0.9%, to \$84.78 a barrel.

Kuwait Market

The market closed up today by + 0.55% at 7,370.40 value traded 31.3 million KD, Premier market value traded reached 27.4 million KD up by + 0.69% at 8,246.46.

KSA Market

The market closed up today by + 0.73% at 10,573.05.



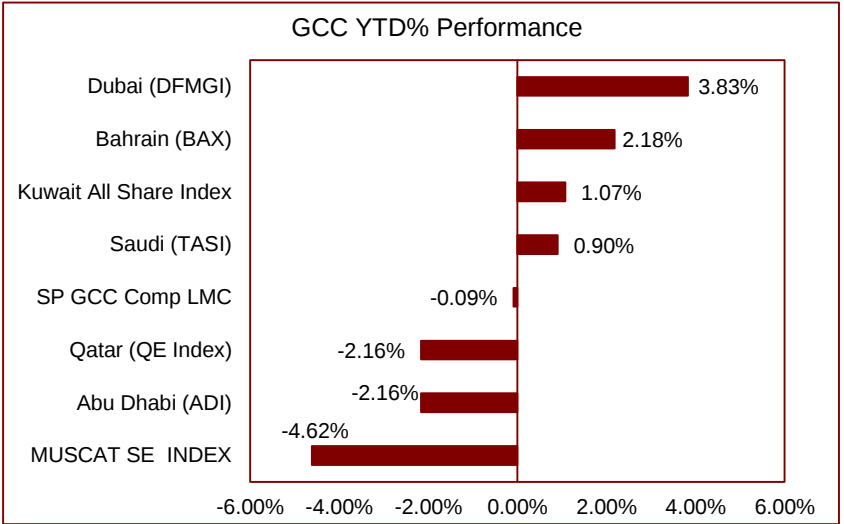
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.113	1.18	0.27	1.46	3.25	3.25	8.42 KWD	2.07	27.00
KFH	0.882	0.68	1.73	5.50	7.17	7.17	11.85 KWD	2.01	32.00
Zain	0.549	-0.18	-0.36	-0.90	-2.49	-2.49	2.38 KWD	1.98	11.75
BOUBYAN BANK	0.776	3.05	0.00	-1.02	-2.76	-2.76	2.90 KWD	3.06	34.00
Agility	0.606	0.17	-0.66	2.54	-15.83	-15.83	1.62 KWD	1.12	39.61
Saudi Arabia									
ARAMCO	33.20	0.76	2.47	0.76	3.43	3.43	7,302.64 SAR	5.26	12.59
SABIC	94.60	0.11	2.49	2.05	5.82	5.82	283.75 SAR	1.55	35.00
STC	36.60	0.55	0.83	-0.81	0.00	0.00	182.97 SAR	2.49	15.11
AL-RAJHI BANK	76.70	0.52	-0.78	-6.46	1.99	1.99	306.74 SAR	3.06	19.56
NCB	48.75	1.14	0.72	3.07	-3.47	-3.47	218.26 SAR	1.30	11.77
United Arab Emirates									
ETISALAT.AD	27.16	-0.07	1.04	5.68	18.81	18.81	206.60 AED	5.10	21.10
FAB.AD	14.26	-0.83	-0.97	4.85	-16.61	-16.61	157.54 AED	1.37	12.08
EMIRATES NBD	13.55	-0.37	-1.09	4.63	4.23	4.23	85.59 AED	0.92	6.85
DB ISLAMIC BK	5.76	0.52	1.95	3.78	1.05	1.05	41.71 AED	1.01	8.24
EMAAR PROPERT	5.70	-1.21	-0.35	2.52	-2.73	-2.73	50.38 AED	0.72	6.87
Qatar									
QNB	15.96	-1.48	-1.97	-11.33	-11.33	-11.33	147.41 QAR	1.40	11.11
INDUSTRIES QAT	13.60	-2.93	-3.00	-3.20	6.17	6.17	82.28 QAR	1.96	9.33
QA ISLAMIC BK	19.00	5.26	3.77	-3.41	2.37	2.37	44.90 QAR	1.65	11.76
MASRAF AL RAYA	2.64	0.96	0.88	-3.48	-16.90	-16.90	24.51 QAR	1.02	16.72
MESAIEED PETRO	2.09	1.95	3.26	-2.79	-1.74	-1.74	26.26 QAR	1.53	13.86
OMAN									
BANK MUSCAT	0.283	0.35	-1.39	2.54	2.91	2.91	2.12 OMR	0.95	8.33
OMANTEL	0.932	4.95	-3.72	-1.69	1.30	1.30	0.70 OMR	1.19	7.69
BANK DHOFAR	0.150	0.00	-1.96	0.00	-14.29	-14.29	0.45 QAR	0.63	14.93
NAT BANK OF OMAN	0.250	0.00	-7.41	-8.76	-13.49	-13.49	0.41 QAR	0.63	12.71
OMINVEST	0.420	0.00	-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
8-Feb 23	24.74%	16.79%	0.06%	1.35%	0.39%	4.46%	17.66%	15.22%	5.87%	5.19%
15-Feb 23	24.78%	16.71%	0.06%	1.35%	0.40%	4.42%	17.68%	15.25%	5.85%	5.16%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.55 %The leading sector best performance indices today are Banking 0.87 % Consumer services 0.51 % Consumer Disc 0.25 % respectively

KSA

Saudi Armco has a positive performance today by + 0.76 %, SABIC has a positive performance today by + 0.10 %, STC has a positive performance today by + 0.55 %, Al Rajhi Bank has a positive performance today by + 0.52 %

U.A.E

ETISALAT .AD has a negative performance today by -0.07 %, FAB.AD has a negative performance today by -0.83 %



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