



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, May 15th 2023



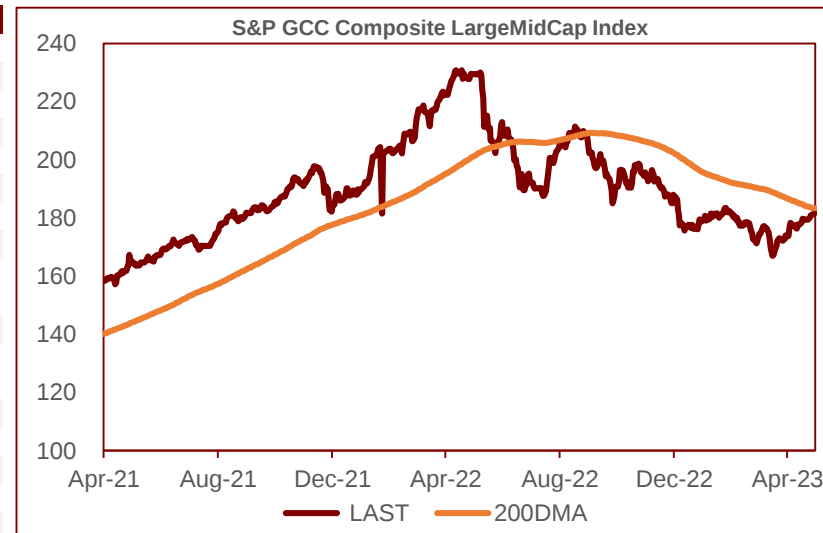


Market Watch

Monday, May 15, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,230.20	-1.04	2.42	-0.69	6.04	7.17	11,031 SAR	1.91	17.73
Qatar (QE Index)	10,479.41	-1.78	3.86	2.93	2.61	-1.89	557 QAR	1.39	11.41
Dubai (DFMGI)	3,525.43	-0.95	1.09	-0.55	3.48	5.68	506 AED	1.25	22.44
Abu Dhabi (ADI)	9,471.29	-1.70	-0.91	-3.25	0.44	-7.25	1,435 AED	1.80	22.41
Bahrain (BAX)	1,938.24	-0.13	3.01	1.78	2.74	2.27	20 BHD	1.61	17.94
MUSCAT SE INDEX	4,715.84	0.23	-1.98	-0.05	-3.03	-2.92	5 OMR	1.01	13.25
SP GCC Comp LMC	178.01	-1.55	0.18	-2.00	2.50	-0.43			
SP UAE PRICE INDEX	130.85	-2.49	-1.19	-4.83	2.24	-4.84			
Developed Markets									
MSCI World Index	2,819.47	0.36	-0.34	-0.58	1.00	8.33			
U.S. (S&P 500)	4,136.28	0.30	-0.24	-0.80	0.66	7.73			
U.K. (FTSE 100)	7,777.70	0.30	-0.84	-1.18	1.91	4.37			
Japan (Topix)	2,114.85	0.88	5.32	2.79	5.56	11.80			
Emerging Markets									
MSCI EM Index	977.48	0.46	-1.96	0.04	-1.29	2.21			
China (SSE Composite)	3,310.74	1.17	-0.23	-0.38	1.16	7.17			
India (Sensex)	62,345.71	0.51	3.17	2.02	5.69	2.47			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,847.00	-0.84	-2.04	-4.14	-2.89	-6.10	44.28 KWD	1.64	19.84
Kuwait Premier Index	7,540.77	-0.97	-2.81	-4.70	-3.59	-7.08	34.40 KWD	1.60	19.46
Kuwait Main Index	5,513.19	-0.29	1.35	-1.66	0.23	-1.49	9.88 KWD	1.75	21.14
NIC 50	8,864.77	0.00	-2.82	-4.71	-3.60	-2.41	28.60 KWD	1.58	18.46
Kuwait Sector									
Banking	1,679.76	-1.02	-2.64	-4.36	-4.17	-6.36	28.29 KWD	1.22	20.46
Telecom	1,095.14	0.13	-3.60	-6.77	-3.28	-7.31	3.36 KWD	1.34	8.68
Industrials	974.86	-0.62	-0.28	-3.05	-1.22	-9.64	3.43 KWD	0.76	21.92
Financial services	1,175.99	-1.32	-2.93	-4.42	-1.67	-6.46	3.38 KWD	0.69	20.06
Real estate	1,089.15	-1.23	-2.57	-4.82	0.83	-9.89	2.36 KWD	0.51	20.56
Basic materials	869.53	-0.65	3.87	-2.52	1.44	0.51	0.77 KWD	1.39	4.46
Health care	458.82	3.48	-0.78	0.40	0.73	-0.66	0.23 KWD	0.98	6.83
Consumer services	495.89	1.32	10.51	8.53	11.37	3.32	0.74 KWD	0.81	13.16
Insurance	2,119.53	-0.29	11.77	0.27	10.97	36.67	0.87 KWD	0.76	9.38
Consumer Disc	1,483.89	1.11	3.86	1.83	1.50	-0.20	0.15 KWD	0.95	0.00
Energy	952.21	-2.05	-4.61	-2.72	-4.58	-16.36	0.20 KWD	0.58	4.53
Technology	582.00	0.00	-6.65	0.00	-8.47	-16.41	0.01 KWD	0.72	0.00
Utilities	478.95	1.11	3.41	4.00	2.83	-3.19	0.20 KWD	1.83	14.91



What Move the GCC markets

Oil Prices

Oil prices were steady on Monday as bullish sentiment about tightening supplies from OPEC+ cuts and a resumption in U.S. buying for reserves competed with concerns about fuel demand in the top global oil consumers, the United States and China. Brent crude futures rose 15 cents to \$74.32 a barrel.

Kuwait Market

The market closed down today by – 0.84% at 6,847.0 value traded 44.1 million KD, Premier market value traded reached 37.9 million KD down by – 0.97% at 7,540.77.

KSA Market

The market closed down today by – 1.04% at 11,230.20

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



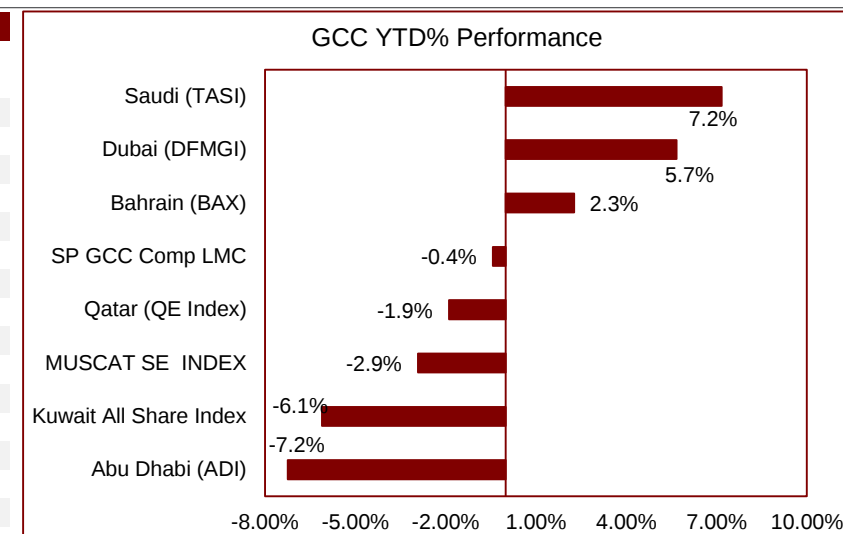
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.940	-1.05	-2.39	-6.37	-6.53	-8.44	7.45 KWD	1.89	27.00
KFH	0.717	-1.38	-3.11	-3.24	-4.52	-4.17	10.58 KWD	1.83	32.00
Zain	0.516	0.00	-6.18	-8.35	-4.44	-8.35	2.23 KWD	1.74	11.00
BOUBAYAN BANK	0.601	-1.80	-4.60	-9.08	-0.92	-20.17	2.38 KWD	2.68	34.00
Agility	0.616	-0.65	3.01	0.00	-0.81	-14.44	1.65 KWD	0.86	22.21
Saudi Arabia									
ARAMCO	33.10	-1.78	10.84	0.30	12.72	13.43	8,009.99 SAR	5.37	14.51
SABIC	91.00	-1.62	-0.22	-2.05	0.78	1.79	272.99 SAR	1.46	35.00
STC	44.95	0.11	5.76	1.24	12.23	22.81	224.74 SAR	3.05	18.32
AL-RAJHI BANK	74.70	-1.06	-1.19	-2.86	1.63	-0.66	298.79 SAR	3.01	17.60
NCB	35.60	-2.33	-4.12	-3.44	4.04	-5.54	213.59 SAR	1.24	11.76
United Arab Emirates									
ETISALAT.AD	22.62	-1.82	-3.50	-5.75	2.54	-1.05	206.60 AED	5.10	21.10
FAB.AD	13.34	-4.44	1.37	-5.92	3.57	-21.99	147.38 AED	1.31	12.56
EMIRATES NBD	13.65	-2.50	5.00	-3.19	3.80	5.00	86.22 AED	0.90	5.16
DB ISLAMIC BK	5.31	-1.85	0.00	-4.50	1.53	-6.84	38.45 AED	0.95	7.38
EMAAR PROPERT	5.95	-1.33	-0.34	0.34	6.25	1.54	52.59 AED	0.76	7.15
Qatar									
QNB	16.20	-2.53	4.52	5.88	0.81	-10.00	149.60 QAR	1.47	10.70
INDUSTRIES QAT	13.02	-0.84	-0.15	0.54	0.15	1.64	78.75 QAR	2.16	10.82
QA ISLAMIC BK	17.91	-3.40	0.79	0.11	0.73	-3.50	42.31 QAR	1.59	10.94
MASRAF AL RAYA	2.68	-2.19	-0.52	2.41	-9.31	-15.48	24.92 QAR	1.06	20.38
MESAIEED PETRO	2.01	-1.95	2.24	2.29	4.74	-5.45	25.26 QAR	1.55	15.86
OMAN									
BANK MUSCAT	0.269	-0.37	-2.18	-1.47	-2.18	-2.18	2.02 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	0.176	2.33	10.00	13.55	10.00	0.57	0.53 QAR	0.74	14.93
NAT BANK OF OMAN	0.280	0.00	-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 -0.84 %The leading sector bottom performance indices today are Energy -2.05 % Financial services -1.32 % Real estate -1.23 % respectively

KSA

Saudi Armco has a negative performance today by -1.78 %, SABIC has a negative performance today by -1.62 %, STC has a positive performance today by + 0.11 %, Al Rajhi Bank has a negative performance today by -1.06 %

U.A.E

ETISALAT .AD has a negative performance today by -1.82 %, FAB.AD has a negative performance today by -4.44 %



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