



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, April 16th 2023



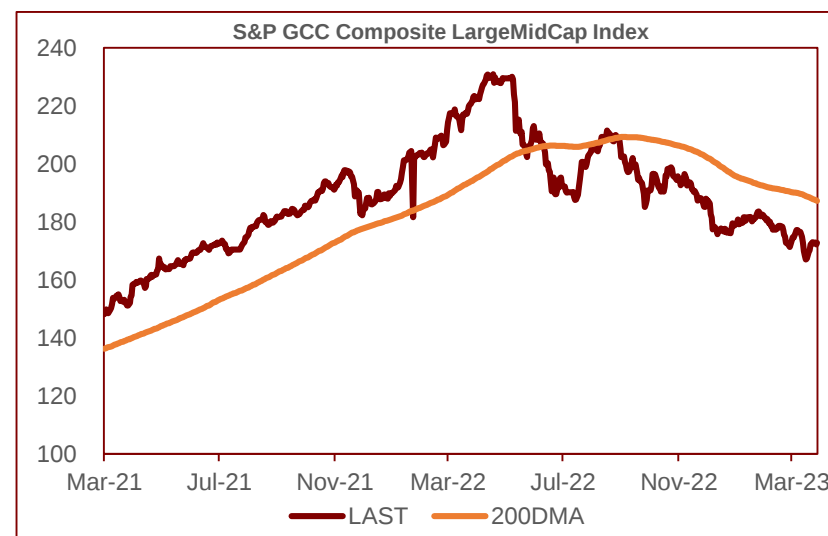


Market Watch

16 April 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,032.57	0.62	0.62	4.18	4.18	5.29	10,278 SAR	1.83	17.74
Qatar (QE Index)	10,055.11	-0.35	-0.35	-1.54	-1.54	-5.86	530 QAR	1.27	10.79
Dubai (DFMGI)	3,491.93	0.13	0.13	2.50	2.50	4.67	502 AED	1.22	23.28
Abu Dhabi (ADI)	9,623.05	0.68	0.68	2.04	2.04	-5.76	1,435 AED	1.75	20.96
Bahrain (BAX)	1,884.85	0.18	0.18	-0.09	-0.09	-0.55	19 BHD	1.67	18.00
MUSCAT SE INDEX	4,759.69	-1.07	-1.07	-2.13	-2.13	-2.01	5 OMR	1.01	13.25
SP GCC Comp LMC	178.48	0.44	0.44	2.77	2.77	-0.16			
SP UAE PRICE INDEX	133.02	0.45	0.45	3.94	3.94	-3.26			
Developed Markets									
MSCI World Index	2,825.75	-0.12	-0.12	1.23	1.23	8.57			
U.S. (S&P 500)	4,137.64	-0.21	-0.21	0.69	0.69	7.77			
U.K. (FTSE 100)	7,871.91	0.36	0.36	3.15	3.15	5.64			
Japan (Topix)	2,018.72	0.54	0.54	0.76	0.76	6.71			
Emerging Markets									
MSCI EM Index	1,000.49	0.35	0.35	1.03	1.03	4.61			
China (SSE Composite)	3,338.15	0.60	0.60	1.99	1.99	8.06			
India (Sensex)	60,431.00	0.00	0.00	2.44	2.44	-0.67			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,027.99	0.55	0.55	-0.32	-0.32	-3.62	45.56 KWD	1.63	21.71
Kuwait Premier Index	7,802.96	0.57	0.57	-0.24	-0.24	-3.85	35.72 KWD	1.65	21.90
Kuwait Main Index	5,462.86	0.42	0.42	-0.69	-0.69	-2.39	9.85 KWD	1.54	21.05
NIC 50	8,838.33	0.61	0.56	-0.25	-0.25	-2.70	28.60 KWD	1.63	20.90
Kuwait Sector									
Banking	1,734.58	0.54	0.54	-1.04	-1.04	-3.31	29.25 KWD	1.26	22.90
Telecom	1,147.15	0.98	0.98	1.32	1.32	-2.90	3.52 KWD	1.94	12.19
Industrials	987.33	1.00	1.00	0.04	0.04	-8.49	3.48 KWD	0.76	17.61
Financial services	1,200.90	-0.87	-0.87	0.41	0.41	-4.48	3.49 KWD	0.67	21.87
Real estate	1,115.66	-0.20	-0.20	3.28	3.28	-7.70	2.43 KWD	0.50	13.70
Basic materials	841.58	0.53	0.53	-1.82	-1.82	-2.72	0.76 KWD	1.51	7.78
Health care	462.45	0.00	0.00	1.53	1.53	0.13	0.23 KWD	1.06	10.54
Consumer services	449.75	0.23	0.23	1.00	1.00	-6.29	0.72 KWD	0.85	13.66
Insurance	2,024.62	6.76	6.76	6.00	6.00	30.55	0.83 KWD	0.81	10.16
Consumer Disc	1,431.84	0.22	0.22	-2.06	-2.06	-3.70	0.14 KWD	0.91	0.00
Energy	1,001.61	0.34	0.34	0.37	0.37	-12.03	0.21 KWD	0.61	4.41
Technology	623.47	0.00	0.00	-1.94	-1.94	-10.45	0.01 KWD	0.77	0.00
Utilities	468.42	1.14	1.14	0.56	0.56	-5.32	0.20 KWD	1.67	13.54



What Move the GCC markets

Oil Prices

Oil prices edged up on Monday, supported by OPEC+'s plans to cut more output, while investors eyed Chinese economic data for signs of a demand recovery by the world's No. 2 oil consumer. Brent crude futures nudged 17 cents higher to \$86.48 a barrel.

Kuwait Market

The market closed up today by + 0.55% at 7,027.99 value traded 22 million KD, Premier market value traded reached 18.6 million KD up by + 0.57% at 7,802.96

KSA Market

The market closed up today by + 0.62% at 11,032.57.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



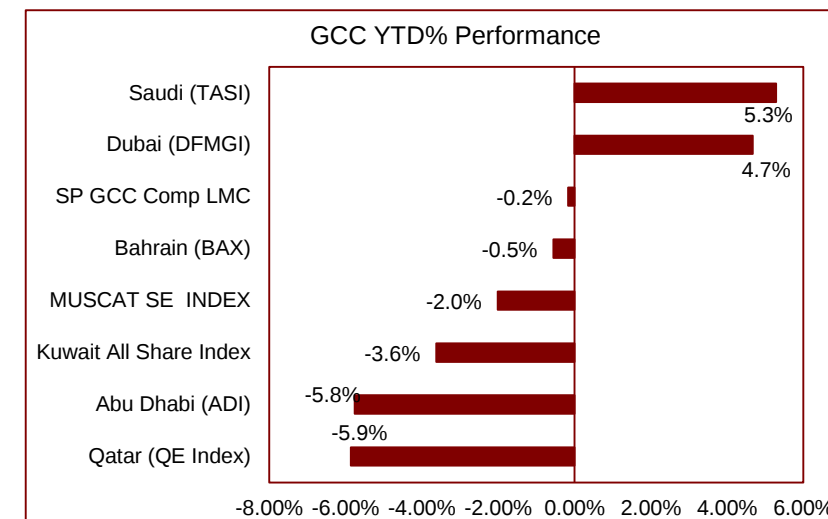
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	0.973	1.04	1.04	-3.25	-3.25	-5.23	7.72 KWD	1.90	27.00
KFH	0.741	0.14	0.14	-1.32	-1.32	-0.96	10.95 KWD	1.85	32.00
Zain	0.552	0.36	0.36	2.22	2.22	-1.95	2.39 KWD	1.94	12.19
BOUBYAN BANK	0.642	1.90	1.90	5.84	5.84	-14.72	2.55 KWD	2.68	34.00
Agility	0.609	1.84	1.84	-1.93	-1.93	-15.42	1.63 KWD	0.97	23.46
Saudi Arabia									
ARAMCO	33.10	0.76	0.76	2.48	2.48	3.12	7,282.00 SAR	5.02	12.36
SABIC	91.20	0.00	0.00	1.00	1.00	2.01	273.60 SAR	1.47	35.00
STC	42.05	-1.06	-1.06	4.99	4.99	14.89	210.25 SAR	2.85	17.43
AL-RAJHI BANK	76.50	1.19	1.19	4.08	4.08	1.73	306.00 SAR	3.05	19.38
NCB	49.85	0.20	0.20	8.72	8.72	-1.29	223.23 SAR	1.33	12.14
United Arab Emirates									
ETISALAT.AD	23.48	0.17	0.17	6.44	6.44	2.71	206.60 AED	5.10	21.10
FAB.AD	13.24	0.61	0.61	2.80	2.80	-22.57	146.27 AED	1.27	11.21
EMIRATES NBD	13.00	0.00	0.00	-1.14	-1.14	0.00	82.12 AED	0.88	6.57
DB ISLAMIC BK	5.34	0.56	0.56	2.10	2.10	-6.32	38.67 AED	0.93	7.64
EMAAR PROPERT	6.02	0.84	0.84	7.50	7.50	2.73	53.21 AED	0.77	7.23
Qatar									
QNB	15.40	-0.65	-0.65	-4.17	-4.17	-14.44	142.07 QAR	1.40	10.17
INDUSTRIES QAT	12.85	-1.46	-1.46	-1.15	-1.15	0.31	77.65 QAR	1.85	8.82
QA ISLAMIC BK	17.85	0.45	0.45	0.39	0.39	-3.83	42.13 QAR	1.58	10.91
MASRAF AL RAYA	2.68	-0.52	-0.52	-9.31	-9.31	-15.48	24.89 QAR	1.03	17.01
MESAIEED PETRO	1.95	-1.02	-1.02	1.41	1.41	-8.46	24.43 QAR	1.41	13.84
OMAN									
BANK MUSCAT	0.274	-0.36	-0.36	-0.36	-0.36	-0.36	2.05 OMR	0.92	8.33
OMANTEL	1.000	12.61	-1.48	-9.09	-9.09	8.70	0.75 OMR	1.18	7.69
BANK DHOFAR	0.160	0.00	0.00	0.00	0.00	-8.57	0.48 QAR	0.67	14.93
NAT BANK OF OMAN	0.278	-2.11	-2.11	3.73	3.73	-3.81	0.45 QAR	0.71	12.71
OMINVEST	0.424	1.92	1.92	-14.52	-14.52	0.95	0.28 QAR	0.80	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
5-April 23	24.85%	16.26%	0.06%	1.38%	0.41%	4.65%	17.70%	14.34%	6.07%	5.07%
12-April 23	24.87%	16.21%	0.06%	1.38%	0.41%	4.65%	17.70%	14.35%	6.12%	5.06%

End of Report

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Leading Sector, Security Performance

Kuwait

The market is up today by + 0.55 %The leading sector best performance indices today are Insurance 6.76 % Utilities 1.14 % Industrials 1 % respectively

KSA

Saudi Armco has a positive performance today by + 0.76 %, SABIC flat performance today 0 %. STC have negative performance today by -1.06 %, Al Rajhi Bank has a positive performance today by + 1.19 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.17 %, FAB.AD has a positive performance today by + 0.61 %



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