



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, February 16th 2023

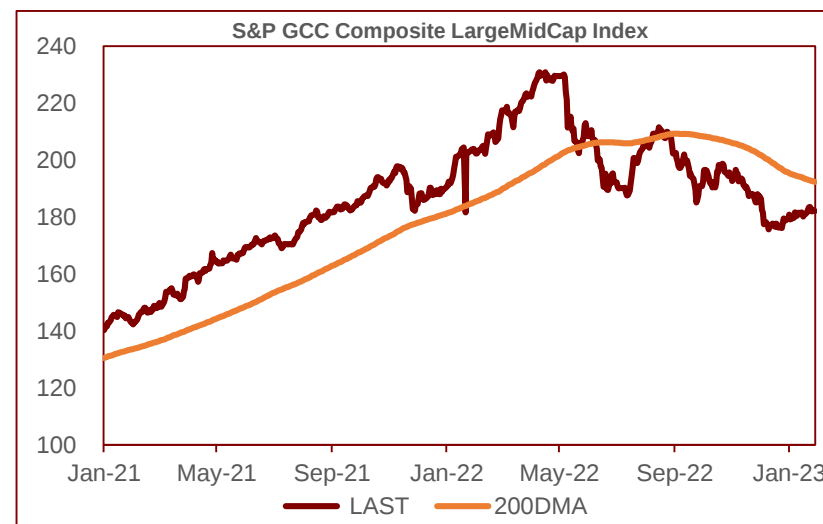




Market Watch

Thursday, February 16, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,493.17	-0.23	1.31	-2.26	0.67	0.67	10,049 SAR	1.71	14.85
Qatar (QE Index)	10,716.45	1.83	2.08	-2.66	-0.37	-0.37	542 QAR	1.35	12.55
Dubai (DFMGI)	3,457.72	0.17	0.69	5.04	4.00	4.00	496 AED	1.20	18.05
Abu Dhabi (ADI)	9,977.24	-0.27	-0.48	1.54	-2.43	-2.43	1,435 AED	1.92	22.81
Bahrain (BAX)	1,937.47	-0.05	-0.07	0.39	2.13	2.13	20 BHD	1.53	18.00
MUSCAT SE INDEX	4,653.35	0.44	-2.42	-1.06	-4.20	-4.20	5 OMR	0.93	13.25
SP GCC Comp LMC	178.29	-0.01	0.71	-1.55	-0.10	-0.10			
SP UAE PRICE INDEX	138.47	-0.33	-0.45	3.48	0.77	0.77			
Developed Markets									
MSCI World Index	2,779.88	-0.88	0.00	0.20	7.22	7.22			
U.S. (S&P 500)	4,079.09	-1.38	0.22	0.34	6.53	6.53			
U.K. (FTSE 100)	8,004.36	0.18	1.28	3.10	7.53	7.53			
Japan (Topix)	1,991.93	0.67	0.81	1.31	5.78	5.78			
Emerging Markets									
MSCI EM Index	999.42	0.62	-1.31	-1.97	5.73	5.73			
China (SSE Composite)	3,224.02	-0.96	-0.65	-0.20	5.17	5.17			
India (Sensex)	61,002.57	0.07	0.84	2.97	0.79	0.79			
Kuwait									
Kuwait All Share Index	7,364.47	-0.08	0.33	1.20	0.99	0.99	47.63 KWD	1.78	28.51
Kuwait Premier Index	8,232.43	-0.17	0.38	1.82	1.44	1.44	37.64 KWD	1.80	23.73
Kuwait Main Index	5,550.73	0.34	0.14	-1.29	-0.82	-0.82	9.98 KWD	1.66	46.63
NIC 50	9,159.05	0.00	0.37	1.81	1.43	7.47	28.60 KWD	1.78	22.73
Kuwait Sector									
Banking	1,850.21	-0.35	0.37	2.03	3.14	3.14	31.16 KWD	1.32	24.73
Telecom	1,149.87	0.12	-0.19	-3.99	-2.67	-2.67	3.53 KWD	1.97	11.73
Industrials	996.90	0.17	0.47	1.74	-7.60	-7.60	3.50 KWD	0.78	18.27
Financial services	1,262.34	0.16	0.18	0.68	0.41	0.41	3.58 KWD	0.68	17.94
Real estate	1,167.21	1.26	-0.61	-1.82	-3.43	-3.43	2.54 KWD	0.55	22.41
Basic materials	858.79	0.44	0.27	-0.50	-0.73	-0.73	0.77 KWD	1.28	8.31
Health care	447.32	0.00	0.00	0.82	-3.15	-3.15	0.22 KWD	2.35	13.55
Consumer services	471.73	-0.22	-0.36	-1.64	-1.71	-1.71	0.73 KWD	0.94	11.02
Insurance	1,595.13	1.69	1.33	2.67	2.86	2.86	0.66 KWD	0.84	10.09
Consumer Disc	1,450.87	1.21	2.81	3.36	-2.42	-2.42	0.14 KWD	0.95	0.00
Energy	1,095.69	0.01	1.02	-0.26	-3.76	-3.76	0.23 KWD	0.58	4.74
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 prices angled upward in early Asian trade on Thursday as the market shrugged off a giant U.S. crude inventory build and the International Energy Agency boosted its demand outlook. Brent crude futures rose 26 cents to \$85.64 per barrel.

Kuwait Market

The market closed down today by - 0.08% at 7,364.47 value traded 40.5 million KD, Premier market value traded reached 35.5 million KD down by - 0.17% at 8,232.43.

KSA Market

The market closed down today by - 0.23% at 10,493.17.



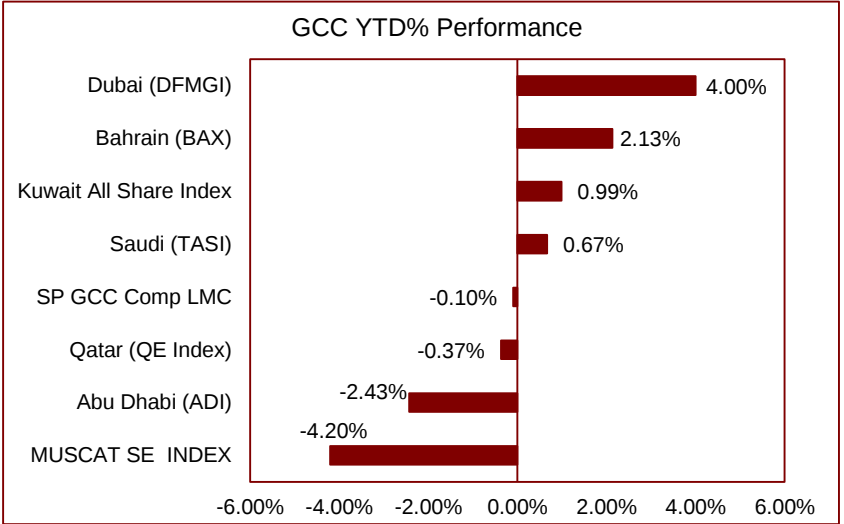
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.108	-0.45	-0.18	1.00	2.78	2.78	8.37 KWD	2.06	27.00
KFH	0.878	-0.45	1.27	5.02	6.68	6.68	11.79 KWD	2.00	32.00
Zain	0.548	-0.18	-0.54	-1.08	-2.66	-2.66	2.37 KWD	1.97	11.73
BOUBYAN BANK	0.778	0.26	0.26	-0.77	-2.51	-2.51	2.91 KWD	3.06	34.00
Agility	0.608	0.33	-0.33	2.88	-15.56	-15.56	1.63 KWD	1.12	39.74
Saudi Arabia									
ARAMCO	33.05	-0.45	2.01	0.30	2.96	2.96	7,217.92 SAR	5.20	12.63
SABIC	95.60	1.06	3.58	3.13	6.94	6.94	285.38 SAR	1.56	35.00
STC	36.45	-0.41	0.41	-1.22	-0.41	-0.41	181.30 SAR	2.47	15.13
AL-RAJHI BANK	76.20	-0.65	-1.42	-7.07	1.33	1.33	302.08 SAR	3.01	19.54
NCB	48.95	0.41	1.14	3.49	-3.07	-3.07	218.14 SAR	1.30	11.95
United Arab Emirates									
ETISALAT.AD	26.96	-0.74	0.30	4.90	17.94	17.94	206.60 AED	5.10	21.10
FAB.AD	14.00	-1.82	-2.78	2.94	-18.13	-18.13	155.11 AED	1.35	11.89
EMIRATES NBD	13.40	-1.11	-2.19	3.47	3.08	3.08	83.70 AED	0.90	6.69
DB ISLAMIC BK	5.72	-0.69	1.24	3.06	0.35	0.35	41.93 AED	1.01	8.29
EMAAR PROPERT	5.68	-0.35	-0.70	2.16	-3.07	-3.07	50.65 AED	0.72	6.90
Qatar									
QNB	16.20	1.50	-0.49	-10.00	-10.00	-10.00	155.04 QAR	1.47	11.66
INDUSTRIES QAT	14.00	2.94	-0.14	-0.36	9.29	9.29	84.33 QAR	2.00	9.55
QA ISLAMIC BK	19.51	2.68	6.55	-0.81	5.12	5.12	47.81 QAR	1.75	12.50
MASRAF AL RAYA	2.78	5.54	6.47	1.87	-12.30	-12.30	26.14 QAR	1.08	17.80
MESAIEED PETRO	2.07	-0.96	2.27	-3.72	-2.68	-2.68	26.19 QAR	1.50	14.78
OMAN									
BANK MUSCAT	0.284	0.35	-1.05	2.90	3.27	3.27	2.13 OMR	0.96	8.33
OMANTEL	0.936	5.41	-3.31	-1.27	1.74	1.74	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	0.262	4.80	-2.96	-4.38	-9.34	-9.34	0.43 QAR	0.66	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 down today by -0.08 %The leading sector bottom performance indices today are Banking -0.35 % Consumer services -0.22 % Health care 0 % respectively

KSA

Saudi Armco has a negative performance today by -0.45 %, SABIC has a positive performance today by + 1.06%, STC has a negative performance today by -0.41 %, Al Rajhi Bank has a negative performance today by -0.65 %

U.A.E

ETISALAT .AD has a negative performance today by -0.74 %, FAB.AD has a negative performance today by -1.82 %



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