



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, May 16th 2023





Market Watch

Tuesday, May 16, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,206.02	-0.22	2.20	-0.90	5.82	6.94	10,862 SAR	1.96	17.63
Qatar (QE Index)	10,468.51	-0.10	3.75	2.82	2.51	-1.99	557 QAR	1.40	11.35
Dubai (DFMGI)	3,509.10	-0.46	0.62	-1.01	3.01	5.19	504 AED	1.25	24.05
Abu Dhabi (ADI)	9,475.66	0.05	-0.86	-3.20	0.48	-7.20	1,435 AED	1.81	21.87
Bahrain (BAX)	1,938.24	0.00	3.01	1.78	2.74	2.27	20 BHD	1.61	17.87
MUSCAT SE INDEX	4,709.72	-0.13	-2.11	-0.18	-3.15	-3.04	5 OMR	1.00	13.25
SP GCC Comp LMC	177.86	-0.08	0.10	-2.08	2.41	-0.51			
SP UAE PRICE INDEX	131.14	0.22	-0.97	-4.62	2.47	-4.63			

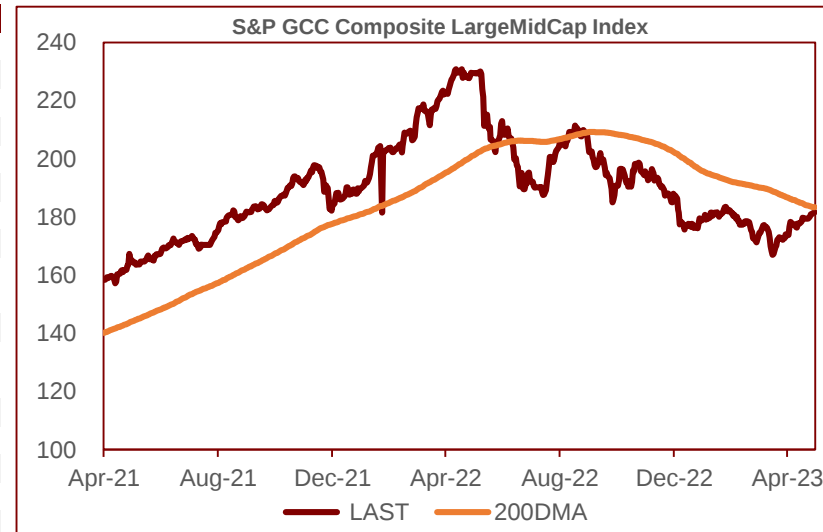
Developed Markets

MSCI World Index	2,802.39	-0.61	-0.95	-1.18	0.39	7.67			
U.S. (S&P 500)	4,109.90	-0.64	-0.88	-1.43	0.01	7.04			
U.K. (FTSE 100)	7,751.08	-0.34	-1.18	-1.52	1.56	4.02			
Japan (Topix)	2,127.18	0.58	5.94	3.39	6.17	12.45			

Emerging Markets

MSCI EM Index	979.24	0.18	-1.78	0.22	-1.12	2.39			
China (SSE Composite)	3,290.99	-0.60	-0.82	-0.97	0.55	6.53			
India (Sensex)	61,932.47	-0.66	2.48	1.34	4.99	1.79			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,814.52	-0.47	-2.51	-4.59	-3.35	-6.55	44.13 KWD	1.64	19.63
Kuwait Premier Index	7,500.11	-0.54	-3.33	-5.21	-4.11	-7.58	34.26 KWD	1.59	19.17
Kuwait Main Index	5,502.27	-0.20	1.14	-1.86	0.03	-1.69	9.87 KWD	1.77	21.23
NIC 50	8,864.77	0.00	-3.34	-5.22	-4.12	-2.41	28.60 KWD	1.57	18.17
Kuwait Sector									
Banking	1,668.54	-0.67	-3.29	-4.99	-4.81	-6.99	28.14 KWD	1.21	20.17
Telecom	1,092.91	-0.20	-3.79	-6.96	-3.48	-7.49	3.36 KWD	1.34	8.68
Industrials	972.28	-0.26	-0.54	-3.30	-1.49	-9.88	3.42 KWD	0.76	21.39
Financial services	1,171.18	-0.41	-3.32	-4.81	-2.07	-6.85	3.37 KWD	0.68	20.16
Real estate	1,089.68	0.05	-2.52	-4.77	0.88	-9.85	2.36 KWD	0.51	20.34
Basic materials	883.08	1.56	5.49	-1.00	3.02	2.08	0.78 KWD	1.38	4.46
Health care	458.82	0.00	-0.78	0.40	0.73	-0.66	0.23 KWD	0.98	6.83
Consumer services	512.03	3.25	14.11	12.06	14.99	6.68	0.73 KWD	0.82	13.04
Insurance	2,121.91	0.11	11.89	0.39	11.10	36.83	0.87 KWD	0.76	9.38
Consumer Disc	1,477.51	-0.43	3.41	1.39	1.06	-0.63	0.16 KWD	0.97	0.00
Energy	953.27	0.11	-4.50	-2.61	-4.47	-16.27	0.20 KWD	0.60	4.49
Technology	582.00	0.00	-6.65	0.00	-8.47	-16.41	0.01 KWD	0.72	0.00
Utilities	478.95	0.00	3.41	4.00	2.83	-3.19	0.20 KWD	1.83	14.91



What Move the GCC markets

Oil Prices

Oil futures traded sideways on Tuesday, after mostly weaker-than-expected data from China muddled the outlook for demand from the world's top crude importer while U.S. plans to refill its Strategic Petroleum Reserve (SPR) underpinned prices. Brent crude futures were down 53 cents, or 0.7%, at \$74.70 a barrel.

Kuwait Market

The market closed down today by – 0.47% at 6,814.52 value traded 30.9 million KD, Premier market value traded reached 26.8 million KD down by – 0.54% at 7,500.11.

KSA Market

The market closed down today by – 0.22% at 11,206.02

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



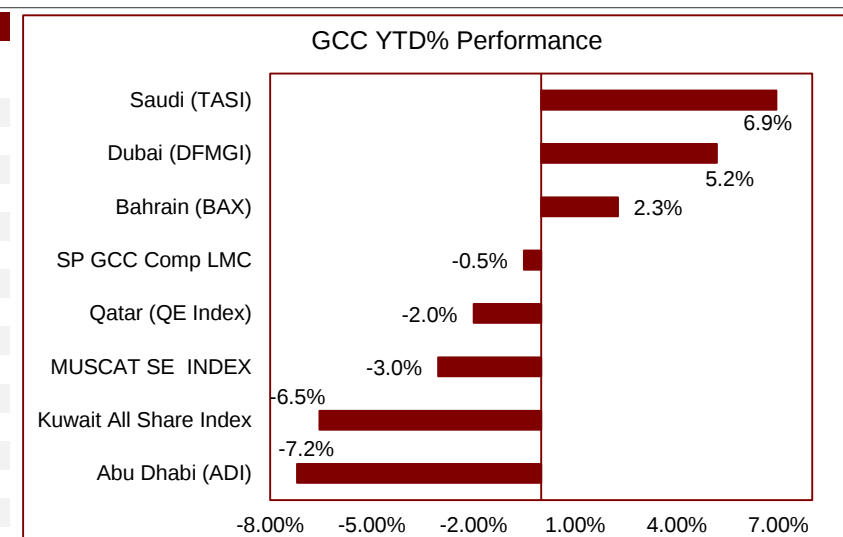
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.926	-1.49	-3.84	-7.77	-7.93	-9.81	7.35 KWD	1.86	27.00
KFH	0.715	-0.28	-3.38	-3.51	-4.78	-4.44	10.57 KWD	1.82	32.00
Zain	0.515	-0.19	-6.36	-8.53	-4.63	-8.53	2.23 KWD	1.74	10.98
BOUBYAN BANK	0.594	-1.16	-5.71	-10.14	-2.08	-21.10	2.36 KWD	2.65	34.00
Agility	0.613	-0.49	2.51	-0.49	-1.29	-14.86	1.64 KWD	0.86	22.10
Saudi Arabia									
ARAMCO	32.40	-2.11	8.49	-1.82	10.34	11.03	7,840.59 SAR	5.25	14.25
SABIC	91.00	0.00	-0.22	-2.05	0.78	1.79	272.99 SAR	1.46	35.00
STC	44.30	-1.45	4.24	-0.23	10.61	21.04	221.49 SAR	3.00	18.34
AL-RAJHI BANK	74.70	0.00	-1.19	-2.86	1.63	-0.66	298.79 SAR	3.01	17.41
NCB	35.70	0.28	-3.85	-3.17	4.33	-5.28	214.20 SAR	1.24	11.49
United Arab Emirates									
ETISALAT.AD	22.58	-0.18	-3.67	-5.92	2.36	-1.22	206.60 AED	5.10	21.10
FAB.AD	13.46	0.90	2.28	-5.08	4.50	-21.29	148.69 AED	1.33	12.68
EMIRATES NBD	13.90	1.83	6.92	-1.42	5.70	6.92	87.80 AED	0.92	5.25
DB ISLAMIC BK	5.32	0.19	0.19	-4.32	1.72	-6.67	38.52 AED	0.95	7.40
EMAAR PROPERT	5.91	-0.67	-1.01	-0.34	5.54	0.85	52.23 AED	0.73	6.23
Qatar									
QNB	16.22	0.12	4.65	6.01	0.93	-9.89	149.81 QAR	1.47	10.71
INDUSTRIES QAT	12.99	-0.23	-0.38	0.31	-0.08	1.41	78.59 QAR	2.15	10.80
QA ISLAMIC BK	17.90	-0.06	0.73	0.06	0.67	-3.56	42.30 QAR	1.59	10.94
MASRAF AL RAYA	2.69	0.37	-0.15	2.79	-8.97	-15.17	25.02 QAR	1.06	20.46
MESAIEED PETRO	2.03	0.70	2.95	3.00	5.47	-4.80	25.44 QAR	1.56	15.97
OMAN									
BANK MUSCAT	0.269	0.00	-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	0.00	10.00	13.55	10.00	0.57	0.53 QAR	0.74	14.93
NAT BANK OF OMAN	0.282	0.71	-0.70	2.55	5.22	-2.42	0.46 QAR	0.71	12.71
OMINVEST	0.382	-2.05	-8.17	-5.91	-22.98	-9.05	0.26 QAR	0.72	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 -0.47 %The leading sector bottom performance indices today are Banking -0.67 % Consumer Disc -0.43 % Financial services -0.41 % respectively

KSA

Saudi Armco has a negative performance today by -2.11 %, SABIC has a flat performance today, STC has a negative performance today by -1.45 %, Al Rajhi Bank has a flat performance today

U.A.E

ETISALAT .AD has a negative performance today by -0.18 %, FAB.AD has a positive performance today by + 0.9 %



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