



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, May 17th 2023



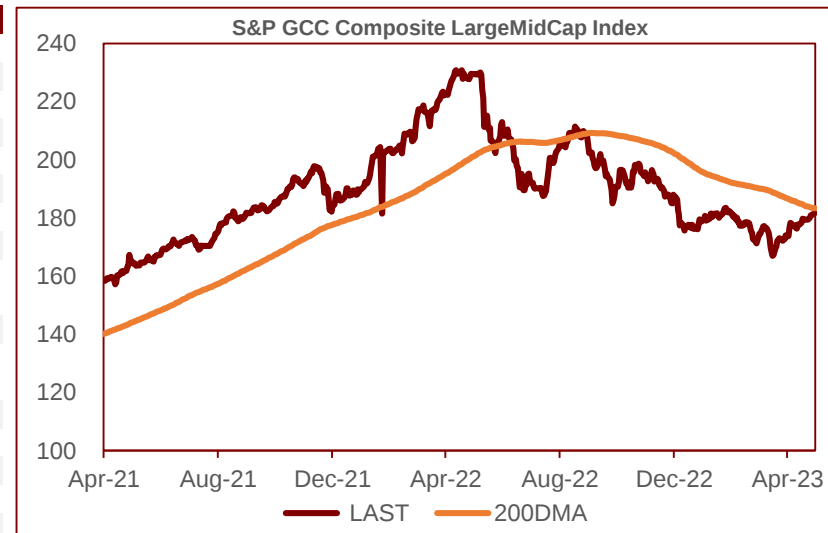


Market Watch

Wednesday, May 17, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,277.60	0.64	2.85	-0.27	6.49	7.63	10,807 SAR	1.95	17.63
Qatar (QE Index)	10,681.79	2.04	5.87	4.92	4.59	0.01	568 QAR	1.42	11.47
Dubai (DFMGI)	3,565.82	1.62	2.25	0.59	4.67	6.89	510 AED	1.20	25.69
Abu Dhabi (ADI)	9,525.97	0.53	-0.34	-2.69	1.02	-6.71	1,435 AED	1.81	21.44
Bahrain (BAX)	1,940.35	0.11	3.13	1.89	2.85	2.38	20 BHD	1.66	17.88
MUSCAT SE INDEX	4,695.16	-0.31	-2.41	-0.49	-3.45	-3.34	5 OMR	1.00	13.25
SP GCC Comp LMC	179.28	0.80	0.89	-1.30	3.23	0.28			
SP UAE PRICE INDEX	132.27	0.86	-0.11	-3.79	3.36	-3.80			
Developed Markets									
MSCI World Index	2,820.92	0.66	-0.29	-0.53	1.06	8.38			
U.S. (S&P 500)	4,158.77	1.19	0.30	-0.26	1.20	8.32			
U.K. (FTSE 100)	7,723.23	-0.36	-1.53	-1.87	1.20	3.64			
Japan (Topix)	2,133.61	0.30	6.26	3.70	6.49	12.79			
Emerging Markets									
MSCI EM Index	975.83	-0.35	-2.13	-0.12	-1.46	2.03			
China (SSE Composite)	3,284.23	-0.21	-1.03	-1.17	0.35	6.31			
India (Sensex)	61,560.64	-0.60	1.87	0.73	4.36	1.18			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,745.55	-1.01	-3.50	-5.56	-4.33	-7.50	43.67 KWD	1.62	19.36
Kuwait Premier Index	7,417.83	-1.10	-4.39	-6.25	-5.16	-8.60	33.85 KWD	1.57	18.83
Kuwait Main Index	5,466.43	-0.65	0.49	-2.50	-0.62	-2.33	9.82 KWD	1.78	21.18
NIC 50	8,864.77	0.00	-4.40	-6.26	-5.17	-2.41	28.60 KWD	1.55	17.83
Kuwait Sector									
Banking	1,647.06	-1.29	-4.53	-6.22	-6.04	-8.19	27.76 KWD	1.19	19.83
Telecom	1,083.82	-0.83	-4.59	-7.73	-4.28	-8.26	3.33 KWD	1.33	8.60
Industrials	964.44	-0.81	-1.34	-4.08	-2.28	-10.61	3.39 KWD	0.78	20.92
Financial services	1,165.96	-0.45	-3.75	-5.24	-2.51	-7.26	3.35 KWD	0.69	20.27
Real estate	1,082.97	-0.62	-3.12	-5.36	0.26	-10.40	2.36 KWD	0.50	20.15
Basic materials	860.11	-2.60	2.74	-3.58	0.34	-0.58	0.77 KWD	1.37	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	513.16	0.22	14.36	12.31	15.24	6.92	0.73 KWD	0.81	12.71
Insurance	2,177.05	2.60	14.80	3.00	13.98	40.38	0.90 KWD	0.76	9.38
Consumer Disc	1,473.82	-0.25	3.16	1.14	0.81	-0.88	0.16 KWD	0.96	0.00
Energy	927.63	-2.69	-7.07	-5.23	-7.04	-18.52	0.19 KWD	0.62	4.41
Technology	582.00	0.00	-6.65	0.00	-8.47	-16.41	0.01 KWD	0.72	0.00
Utilities	481.58	0.55	3.98	4.57	3.39	-2.66	0.20 KWD	1.84	14.99



What Move the GCC markets

Oil Prices

Oil prices rose Wednesday even after a surprise rise in U.S. crude inventories stoked demand concerns as economic worries competed with a tighter supply outlook for later in the year. Brent crude futures rose 44 cents, or 0.6%, to \$75.35 a barrel.

Kuwait Market

The market closed down today by - 1.01% at 6,745.55 value traded 42.2 million KD, Premier market value traded reached 37.0 million KD down by - 1.10% at 7,417.83.

KSA Market

The market closed up today by + 0.64% at 11,277.60

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



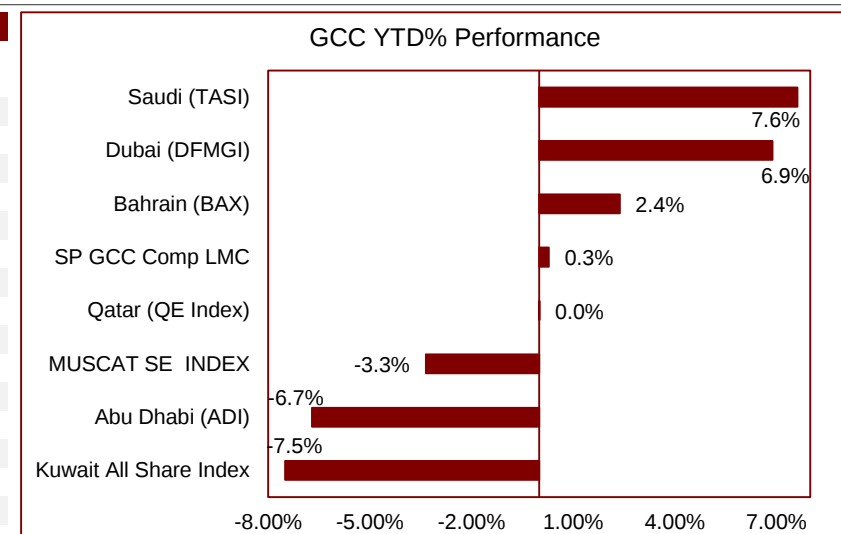
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.916	-1.08	-4.88	-8.76	-8.92	-10.78	7.27 KWD	1.84	27.00
KFH	0.704	-1.54	-4.86	-4.99	-6.25	-5.91	10.40 KWD	1.79	32.00
Zain	0.514	-0.19	-6.55	-8.70	-4.81	-8.70	2.22 KWD	1.73	10.96
BOUBYAN BANK	0.579	-2.53	-8.10	-12.41	-4.55	-23.09	2.29 KWD	2.59	34.00
Agility	0.609	-0.65	1.84	-1.14	-1.93	-15.42	1.63 KWD	0.85	21.95
Saudi Arabia									
ARAMCO	32.10	-0.93	7.49	-2.73	9.32	10.00	7,763.64 SAR	5.21	13.95
SABIC	91.00	0.00	-0.22	-2.05	0.78	1.79	272.84 SAR	1.46	35.00
STC	44.15	-0.34	3.88	-0.56	10.24	20.63	220.62 SAR	2.95	18.07
AL-RAJHI BANK	75.00	0.40	-0.79	-2.47	2.04	-0.27	299.82 SAR	3.02	17.41
NCB	37.00	3.64	-0.35	0.36	8.13	-1.83	221.87 SAR	1.29	11.52
United Arab Emirates									
ETISALAT.AD	22.50	-0.35	-4.01	-6.25	1.99	-1.57	206.60 AED	5.10	21.10
FAB.AD	13.60	1.04	3.34	-4.09	5.59	-20.47	150.24 AED	1.34	12.81
EMIRATES NBD	13.95	0.36	7.31	-1.06	6.08	7.31	88.11 AED	0.92	5.27
DB ISLAMIC BK	5.33	0.19	0.38	-4.14	1.91	-6.49	38.59 AED	0.95	7.41
EMAAR PROPERT	6.00	1.52	0.50	1.18	7.14	2.39	53.03 AED	0.74	6.32
Qatar									
QNB	16.85	3.88	8.71	10.13	4.85	-6.39	155.50 QAR	1.53	11.12
INDUSTRIES QAT	13.09	0.77	0.38	1.08	0.69	2.19	79.12 QAR	2.17	10.88
QA ISLAMIC BK	18.70	4.47	5.23	4.53	5.17	0.75	44.15 QAR	1.66	11.42
MASRAF AL RAYA	2.74	1.90	1.74	4.74	-7.24	-13.56	25.47 QAR	1.08	20.84
MESAIEED PETRO	2.05	1.14	4.12	4.17	6.67	-3.71	25.71 QAR	1.58	16.15
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	1.21	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	0.280	-0.71	-1.41	1.82	4.48	-3.11	0.46 QAR	0.71	12.71
OMINVEST	0.382	0.00	-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, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -1.01 %The leading sector bottom performance indices today are Energy -2.69 % Basic materials -2.6 % Banking -1.29 % respectively

KSA

Saudi Armco has a negative performance today by -0.93 %, SABIC has a flat performance today, STC have negative performance today by -0.34 %, Al Rajhi Bank has a positive performance today by + 0.4 %

U.A.E

ETISALAT .AD have negative performance today by -0.35 %, FAB.AD has a positive performance today by + 1.04 %



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