



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, April 18th 2023



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

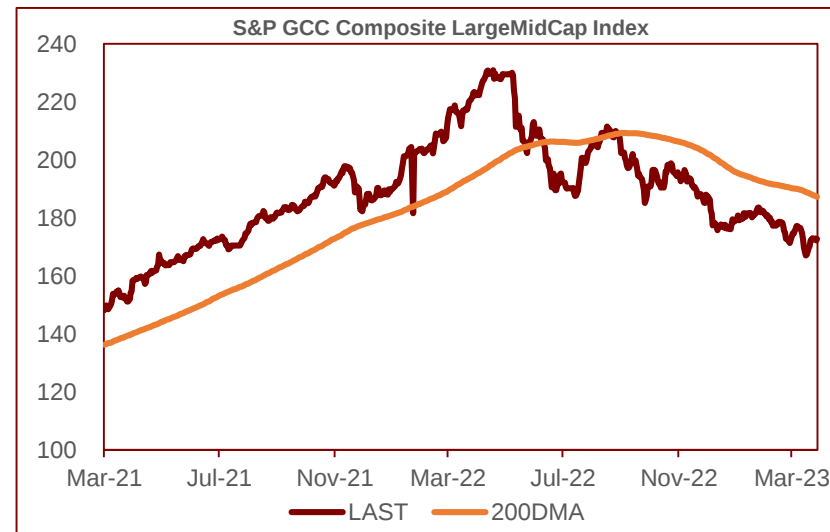


Market Watch

18 April 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,163.57	0.00	1.81	5.42	5.42	6.54	10,636 SAR	1.83	17.74
Qatar (QE Index)	9,952.49	-0.46	-1.36	-2.55	-2.55	-6.82	523 QAR	1.27	10.79
Dubai (DFMGI)	3,511.67	-0.06	0.69	3.08	3.08	5.26	502 AED	1.22	23.28
Abu Dhabi (ADI)	9,638.10	-0.08	0.84	2.20	2.20	-5.61	1,435 AED	1.75	20.96
Bahrain (BAX)	1,883.70	-0.03	0.11	-0.15	-0.15	-0.61	19 BHD	1.67	18.00
MUSCAT SE INDEX	4,748.98	-0.49	-1.29	-2.35	-2.35	-2.23	5 OMR	1.01	13.25
SP GCC Comp LMC	179.78	0.00	1.17	3.52	3.52	0.56			
SP UAE PRICE INDEX	134.57	0.00	1.62	5.15	5.15	-2.13			
Developed Markets									
MSCI World Index	2,835.89	0.31	0.24	1.59	1.59	8.96			
U.S. (S&P 500)	4,154.87	0.09	0.21	1.11	1.11	8.21			
U.K. (FTSE 100)	7,909.44	0.38	0.84	3.64	3.64	6.14			
Japan (Topix)	2,040.89	0.69	1.64	1.87	1.87	7.89			
Emerging Markets									
MSCI EM Index	1,000.55	-0.32	0.35	1.04	1.04	4.62			
China (SSE Composite)	3,393.33	0.23	2.26	3.68	3.68	9.84			
India (Sensex)	59,727.01	-0.31	-1.16	1.25	1.25	-1.83			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,126.02	0.60	1.95	1.07	1.07	-2.28	45.56 KWD	1.63	21.71
Kuwait Premier Index	7,900.50	0.33	1.83	1.01	1.01	-2.65	35.72 KWD	1.65	21.90
Kuwait Main Index	5,574.27	1.78	2.47	1.34	1.34	-0.40	9.85 KWD	1.54	21.05
NIC 50	8,950.25	0.30	1.82	1.00	1.00	-1.47	28.60 KWD	1.63	20.90
Kuwait Sector									
Banking	1,756.18	0.30	1.79	0.19	0.19	-2.10	29.25 KWD	1.26	22.90
Telecom	1,190.48	3.28	4.80	5.14	5.14	0.76	3.52 KWD	1.94	12.19
Industrials	994.51	0.12	1.73	0.77	0.77	-7.82	3.48 KWD	0.76	17.61
Financial services	1,235.73	0.99	2.01	3.32	3.32	-1.71	3.49 KWD	0.67	21.87
Real estate	1,121.40	0.45	0.32	3.82	3.82	-7.22	2.43 KWD	0.50	13.70
Basic materials	847.08	0.32	1.19	-1.18	-1.18	-2.08	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	451.47	-0.90	0.61	1.39	1.39	-5.93	0.72 KWD	0.85	13.66
Insurance	2,001.35	1.59	5.54	4.78	4.78	29.05	0.83 KWD	0.81	10.16
Consumer Disc	1,430.96	0.54	0.16	-2.12	-2.12	-3.76	0.14 KWD	0.91	0.00
Energy	994.01	-1.20	-0.42	-0.39	-0.39	-12.69	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	457.89	-0.57	-1.14	-1.70	-1.70	-7.45	0.20 KWD	1.67	13.54



What Move the GCC markets

Oil Prices

Oil prices rose in early Asian trade on Wednesday as U.S. crude inventories were seen falling and on strong Chinese economic data, signaling strengthening fuel demand. Brent crude futures gained 7 cents to \$84.84 a barrel.

Kuwait Market

The market closed up today by + 0.6% at 7,126.02 value traded 48.1 million KD, Premier market value traded reached 42.2 million KD up by + 0.33% at 7,900.5

KSA Market

Eid Al Fiter Holiday for the Saudi Exchange Trading will discontinue at the end of trading day 17-04-2023. Trading will resume after the holiday on 25-04-2023.

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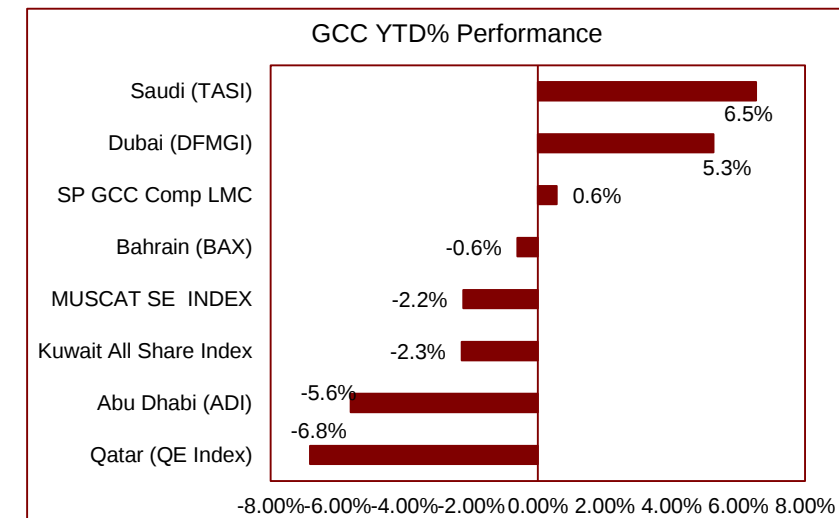
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.991	0.00	2.91	-1.46	-1.46	-3.47	7.86 KWD	1.93	27.00
KFH	0.746	0.54	0.81	-0.65	-0.65	-0.29	11.02 KWD	1.87	32.00
Zain	0.560	0.90	1.82	3.70	3.70	-0.53	2.42 KWD	1.97	12.36
BOUBYAN BANK	0.663	0.91	5.24	9.30	9.30	-11.93	2.63 KWD	2.77	34.00
Agility	0.613	-0.33	2.51	-1.29	-1.29	-14.86	1.64 KWD	0.98	23.62
Saudi Arabia									
ARAMCO	34.65	0.00	5.48	7.28	7.28	7.94	7,621.37 SAR	5.26	12.36
SABIC	92.00	0.00	0.88	1.88	1.88	2.91	275.94 SAR	1.48	35.00
STC	42.55	0.00	0.12	6.24	6.24	16.26	212.70 SAR	2.88	17.43
AL-RAJHI BANK	76.50	0.00	1.19	4.08	4.08	1.73	305.93 SAR	3.05	19.38
NCB	50.40	0.00	1.31	9.92	9.92	-0.20	225.64 SAR	1.35	12.14
United Arab Emirates									
ETISALAT.AD	23.88	0.34	1.88	8.25	8.25	4.46	206.60 AED	5.10	21.10
FAB.AD	13.42	-0.30	1.98	4.19	4.19	-21.52	148.26 AED	1.29	11.37
EMIRATES NBD	13.25	1.15	1.92	0.76	0.76	1.92	83.70 AED	0.90	6.69
DB ISLAMIC BK	5.39	0.56	1.51	3.06	3.06	-5.44	39.03 AED	0.94	7.71
EMAAR PROPERT	6.09	-0.98	2.01	8.75	8.75	3.92	53.83 AED	0.78	7.31
Qatar									
QNB	15.05	-0.27	-2.90	-6.35	-6.35	-16.39	139.01 QAR	1.37	9.94
INDUSTRIES QAT	12.51	-0.32	-4.06	-3.77	-3.77	-2.34	75.69 QAR	1.80	8.59
QA ISLAMIC BK	17.71	-1.34	-0.34	-0.39	-0.39	-4.58	41.85 QAR	1.57	10.82
MASRAF AL RAYA	2.62	-2.06	-2.75	-11.34	-11.34	-17.38	24.37 QAR	1.03	19.92
MESAIEED PETRO	1.96	-0.15	-0.51	1.93	1.93	-7.99	24.59 QAR	1.41	13.91
OMAN									
BANK MUSCAT	0.273	-0.36	-0.73	-0.73	-0.73	-0.73	2.05 OMR	0.92	8.33
OMANTEL	1.015	14.30	0.00	-7.73	-7.73	10.33	0.76 OMR	1.20	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	0.280	-1.41	-1.41	4.48	4.48	-3.11	0.46 QAR	0.71	12.71
OMINVEST	0.422	-0.47	1.44	-14.92	-14.92	0.48	0.28 QAR	0.79	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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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.6 %The leading sector best performance indices today are Telecom 3.28 % Insurance 1.59 % Financial services 0.99 % respectively

KSA

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U.A.E

ETISALAT .AD has a positive performance today by + 0.34 %, FAB.AD have negative performance today by -0.3 %



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