



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, June 18th 2023



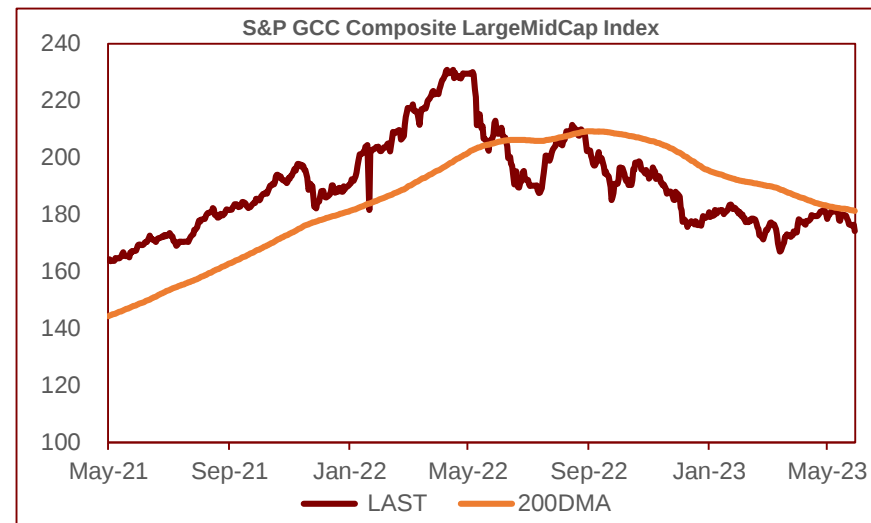


Market Watch

Sunday, June 18, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	11,516.89	0.01	1.05	4.56	8.75	9.91	10,919 SAR	2.11	18.42
Qatar (QE Index)	10,265.83	-0.05	0.08	1.09	0.52	-3.89	548 QAR	1.38	11.33
Dubai (DFMGI)	3,789.13	1.47	2.75	5.94	11.23	13.58	541 AED	1.42	19.53
Abu Dhabi (ADI)	9,446.59	0.66	1.01	0.43	0.17	-7.49	1,435 AED	1.79	20.85
Bahrain (BAX)	1,958.16	0.09	0.19	-0.27	3.79	3.32	20 BHD	6.46	18.00
MUSCAT SE INDEX	4,682.63	0.03	0.51	1.22	-3.71	-3.60	5 OMR	1.00	13.25
SP GCC Comp LMC	180.21	0.29	1.11	3.44	3.77	0.80			
SP UAE PRICE INDEX	134.46	1.47	2.63	2.71	5.07	-2.21			
Developed Markets									
MSCI World Index	2,962.34	-0.14	2.78	5.78	6.12	13.82			
U.S. (S&P 500)	4,409.59	-0.37	2.69	5.50	7.31	14.85			
U.K. (FTSE 100)	7,642.72	0.19	0.57	2.64	0.14	2.56			
Japan (Topix)	2,300.36	0.28	4.97	7.97	14.82	21.60			
Emerging Markets									
MSCI EM Index	1,030.03	0.63	3.62	7.46	4.01	7.70			
China (SSE Composite)	3,273.33	0.63	1.86	2.15	0.01	5.96			
India (Sensex)	63,384.58	0.74	0.85	1.22	7.45	4.18			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	7,047.50	0.63	2.76	3.69	-0.05	-3.35	45.52 KWD	1.70	18.15
Kuwait Premier Index	7,821.46	0.55	2.85	4.36	0.00	-3.63	35.54 KWD	1.66	18.04
Kuwait Main Index	5,498.82	0.92	2.37	1.07	-0.04	-1.75	9.98 KWD	1.83	18.54
NIC 50	8,890.52	0.55	2.84	4.35	-0.01	-2.13	28.60 KWD	1.64	17.04
Kuwait Sector									
Banking	1,704.64	0.42	1.79	3.28	-2.75	-4.98	28.70 KWD	1.22	19.04
Telecom	1,111.37	0.22	1.97	1.37	-1.84	-5.93	3.41 KWD	1.36	8.85
Industrials	1,009.69	0.87	3.85	4.37	2.31	-6.41	3.56 KWD	0.82	20.87
Financial services	1,241.96	1.42	5.17	4.88	3.85	-1.22	3.58 KWD	0.75	19.95
Real estate	1,213.28	0.94	7.87	8.82	12.32	0.38	2.63 KWD	0.60	22.32
Basic materials	971.59	0.47	4.04	5.76	13.35	12.31	0.83 KWD	1.54	8.55
Health care	451.26	-0.33	0.68	-1.65	-0.93	-2.29	0.22 KWD	0.93	6.48
Consumer services	570.36	1.43	8.66	13.36	28.09	18.84	0.78 KWD	0.86	14.19
Insurance	2,183.57	2.16	3.55	2.22	14.32	40.80	0.90 KWD	0.79	11.46
Consumer Disc	1,589.95	1.09	2.83	3.25	8.75	6.94	0.17 KWD	1.04	0.00
Energy	1,017.20	1.78	1.51	2.75	1.94	-10.66	0.21 KWD	0.75	4.41
Technology	646.75	0.00	3.37	-6.32	1.72	-7.11	0.01 KWD	0.80	0.00
Utilities	494.74	0.53	3.87	2.17	6.22	0.00	0.21 KWD	1.89	15.40



What Move the GCC markets

Oil Prices

Global oil prices fell more than \$1 on Monday, backing off last week's gains, as questions over China's economy outweighed OPEC+ output cuts and the seventh straight drop in the number of oil and gas rigs operating in the United States. Brent crude lost \$1.15, or 1.5%, to trade at \$75.46 a barrel.

Kuwait Market

The market closed up today by + 0.63% at 7,047.5 value traded 52.6 million KD, Premier market value traded reached 40.9 million KD up + 0.55% at 7,821.46.

KSA Market

The market closed up today by + 0.01% at 11,516.89.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



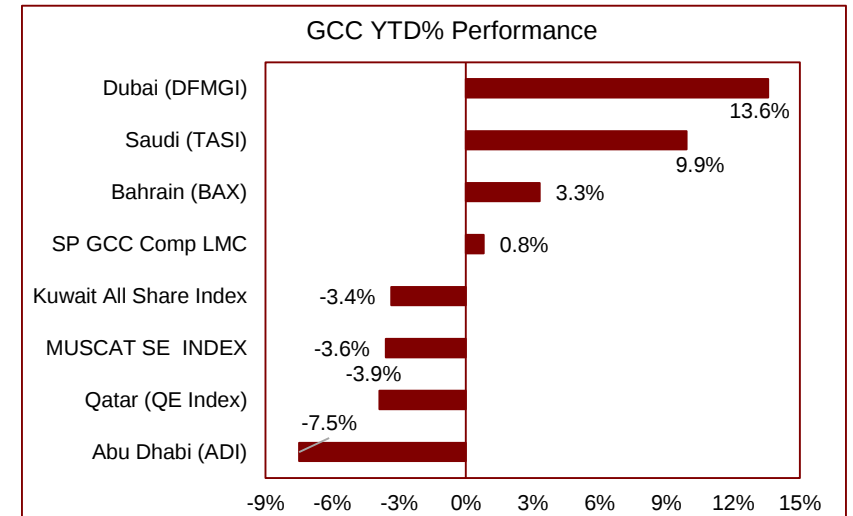
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.939	0.21	0.75	2.07	-6.63	-8.54	7.45 KWD	1.89	27.00
KFH	0.744	0.54	2.48	5.23	-0.92	-0.56	10.98 KWD	1.89	32.00
Zain	0.520	0.00	1.76	0.00	-3.70	-7.64	2.25 KWD	1.75	11.09
BOUBYAN BANK	0.637	0.63	3.24	6.17	5.01	-15.39	2.52 KWD	2.84	34.00
Agility	0.643	0.78	5.07	5.24	3.54	-10.69	1.72 KWD	0.90	23.18
Saudi Arabia									
ARAMCO	32.30	-0.62	-0.46	2.54	10.00	10.69	7,816.60 SAR	5.24	13.99
SABIC	88.70	0.45	-0.34	0.57	-1.77	-0.78	266.10 SAR	1.42	35.00
STC	44.00	-0.23	1.62	1.73	9.86	20.22	220.00 SAR	2.94	17.99
AL-RAJHI BANK	73.80	-0.67	0.54	4.38	0.41	-1.86	295.20 SAR	2.97	17.32
NCB	37.20	0.27	-1.59	0.81	8.71	-1.30	223.20 SAR	1.29	11.97
United Arab Emirates									
ETISALAT.AD	22.48	1.17	0.27	-2.60	1.90	-1.66	206.60 AED	5.10	21.10
FAB.AD	13.40	2.13	4.36	5.51	4.04	-21.64	148.03 AED	1.32	12.62
EMIRATES NBD	14.90	1.02	6.43	9.16	13.31	14.62	94.11 AED	0.98	5.63
DB ISLAMIC BK	5.50	1.48	3.38	4.56	5.16	-3.51	39.82 AED	0.99	7.65
EMAAR PROPERT	6.59	4.60	8.39	7.15	17.68	12.46	58.24 AED	0.82	6.95
Qatar									
QNB	16.18	-0.19	0.50	1.06	0.68	-10.11	149.45 QAR	1.47	10.68
INDUSTRIES QAT	11.63	-0.43	-1.11	-2.92	-10.54	-9.21	70.36 QAR	1.93	9.67
QA ISLAMIC BK	17.97	-1.05	0.67	2.57	1.07	-3.18	42.46 QAR	1.59	10.98
MASRAF AL RAYA	2.63	-0.15	0.73	3.18	-10.96	-17.03	24.47 QAR	1.04	20.01
MESAIEED PETRO	1.97	0.20	-2.24	-0.20	2.34	-7.62	24.69 QAR	1.51	15.50
OMAN									
BANK MUSCAT	0.264	0.00	-1.12	0.76	-4.00	-4.00	1.98 OMR	0.91	8.33
OMANTEL	0.972	9.46	0.00	0.83	-11.64	5.65	0.73 OMR	1.20	7.69
BANK DHOFAR	0.175	0.00	1.16	0.00	9.38	0.00	0.52 QAR	0.74	14.93
NAT BANK OF OMAN	0.280	0.00	2.56	2.56	4.48	-3.11	0.46 QAR	0.71	12.71
OMINVEST	0.356	-0.56	-2.73	-3.78	-28.23	-15.24	0.24 QAR	0.67	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
08-June 23	24.34%	15.37%	0.06%	1.35%	0.23%	4.57%	17.66%	13.9%	6.09%	4.72%
14-June 23	24.3%	15.4%	0.06%	1.39%	0.23%	4.89%	17.66%	13.88%	6.14%	4.69%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.63 %The leading sector best performance indices today are Insurance 2.16 % Energy 1.78 % Consumer services 1.43 % respectively.

KSA

Saudi Armco have negative performance today by -0.62 %, SABIC have positive performance today by + 0.45%. STC have negative performance today by -0.23 %, Al Rajhi Bank have negative performance today by -0.67 %

U.A.E

ETISALAT .AD has a positive performance today by + 1.17 %, FAB.AD has a positive performance today by + 2.13 %



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