



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, April 19th 2023



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

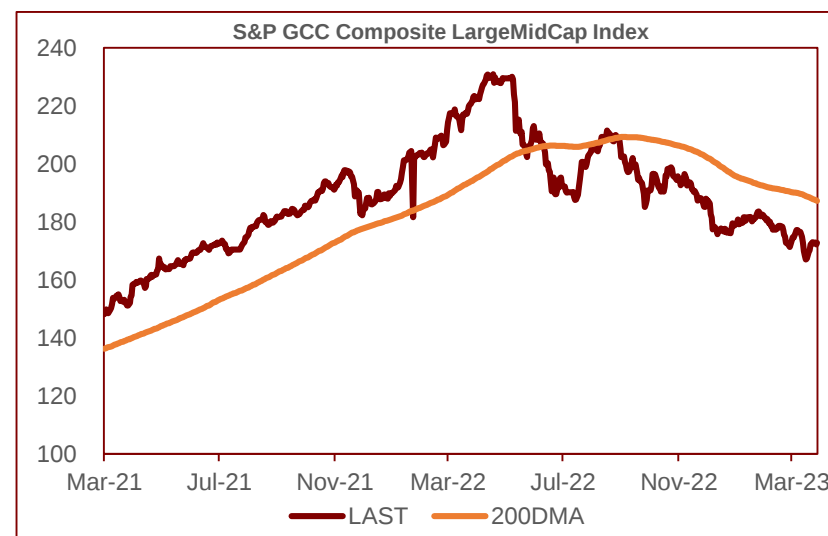


Market Watch

19 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)	9,948.01	-0.05	-1.41	-2.59	-2.59	-6.86	524 QAR	1.29	10.65
Dubai (DFMGI)	3,471.00	-1.16	-0.47	1.89	1.89	4.04	496 AED	1.22	23.19
Abu Dhabi (ADI)	9,633.78	-0.04	0.79	2.16	2.16	-5.65	1,435 AED	1.74	20.92
Bahrain (BAX)	1,885.11	0.08	0.19	-0.08	-0.08	-0.54	20 BHD	1.61	18.00
MUSCAT SE INDEX	4,743.46	-0.12	-1.41	-2.46	-2.46	-2.35	5 OMR	1.02	13.25
SP GCC Comp LMC	179.44	-0.16	0.98	3.32	3.32	0.37			
SP UAE PRICE INDEX	133.22	-0.87	0.60	4.10	4.10	-3.11			
Developed Markets									
MSCI World Index	2,833.39	-0.09	0.15	1.50	1.50	8.86			
U.S. (S&P 500)	4,154.52	-0.01	0.20	1.10	1.10	8.20			
U.K. (FTSE 100)	7,898.77	-0.13	0.71	3.50	3.50	6.00			
Japan (Topix)	2,040.38	-0.02	1.62	1.84	1.84	7.86			
Emerging Markets									
MSCI EM Index	990.37	-1.02	-0.67	0.01	0.01	3.55			
China (SSE Composite)	3,370.13	-0.68	1.56	2.97	2.97	9.09			
India (Sensex)	59,567.80	-0.27	-1.43	0.98	0.98	-2.09			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,123.18	-0.04	1.91	1.03	1.03	-2.32	46.15 KWD	1.67	21.87
Kuwait Premier Index	7,895.06	-0.07	1.76	0.94	0.94	-2.72	36.11 KWD	1.70	22.01
Kuwait Main Index	5,579.17	0.09	2.56	1.43	1.43	-0.31	10.04 KWD	1.56	21.39
NIC 50	8,957.24	0.08	1.75	0.93	0.93	-1.39	28.60 KWD	1.68	21.01
Kuwait Sector									
Banking	1,755.92	-0.01	1.78	0.18	0.18	-2.12	29.59 KWD	1.28	23.01
Telecom	1,177.40	-1.10	3.65	3.99	3.99	-0.34	3.61 KWD	1.97	6.86
Industrials	995.16	0.07	1.80	0.83	0.83	-7.76	3.51 KWD	0.79	18.02
Financial services	1,228.39	-0.59	1.40	2.71	2.71	-2.29	3.58 KWD	0.71	22.41
Real estate	1,122.60	0.11	0.43	3.93	3.93	-7.12	2.44 KWD	0.51	13.74
Basic materials	851.82	0.56	1.75	-0.62	-0.62	-1.54	0.76 KWD	1.53	7.88
Health care	462.45	0.00	0.00	1.53	1.53	0.13	0.23 KWD	1.06	10.54
Consumer services	449.42	-0.45	0.16	0.93	0.93	-6.36	0.72 KWD	0.85	13.84
Insurance	2,101.79	5.02	10.83	10.04	10.04	35.53	0.86 KWD	0.77	10.16
Consumer Disc	1,427.87	-0.22	-0.06	-2.33	-2.33	-3.97	0.14 KWD	0.91	0.00
Energy	1,015.79	2.19	1.76	1.79	1.79	-10.78	0.21 KWD	0.62	4.45
Technology	623.47	0.00	0.00	-1.94	-1.94	-10.45	0.01 KWD	0.77	0.00
Utilities	457.89	0.00	-1.14	-1.70	-1.70	-7.45	0.19 KWD	1.64	13.23



What Move the GCC markets

Oil Prices

Oil prices slid about 2% to a two-week low on Wednesday despite a sharp decline in U.S. crude inventories, as the dollar strengthened on fears that looming Federal Reserve interest rate hikes could curb energy demand in the world's top consumer. Brent futures for June delivery fell \$1.65, or 2.0%, to settle at \$83.12 a barrel.

Kuwait Market

The market closed down today by - 0.04% at 7,123.18 value traded 40.3 million KD, Premier market value traded reached 35.5 million KD down by - 0.07% at 7,895.06

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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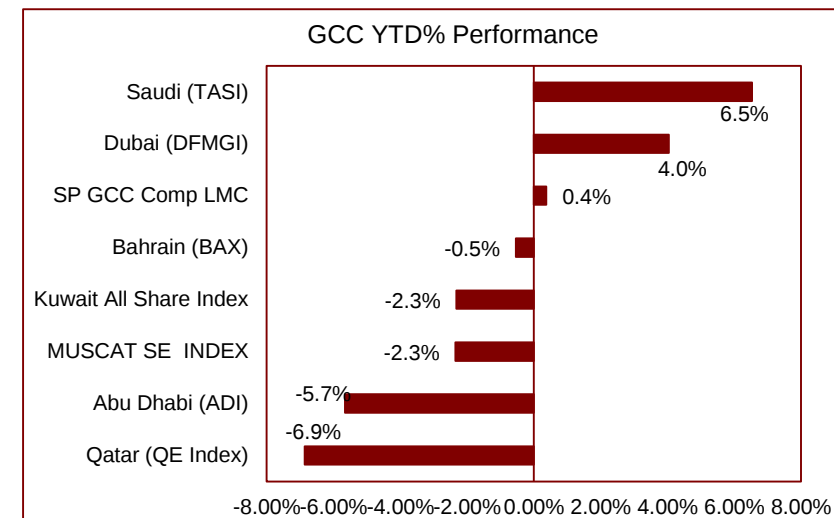
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.994	0.30	3.22	-1.16	-1.16	-3.18	7.89 KWD	2.00	27.00
KFH	0.743	-0.40	0.41	-1.05	-1.05	-0.69	10.98 KWD	1.86	32.00
Zain	0.560	0.00	1.82	3.70	3.70	-0.53	2.42 KWD	1.97	12.36
BOUBYAN BANK	0.676	1.96	7.30	11.44	11.44	-10.21	2.68 KWD	3.02	34.00
Agility	0.614	0.16	2.68	-1.13	-1.13	-14.72	1.64 KWD	0.98	23.65
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	23.38	-2.09	-0.26	5.98	5.98	2.27	206.60 AED	5.10	21.10
FAB.AD	13.34	-0.60	1.37	3.57	3.57	-21.99	147.38 AED	1.28	11.37
EMIRATES NBD	13.20	-0.38	1.54	0.38	0.38	1.54	83.38 AED	0.89	6.69
DB ISLAMIC BK	5.32	-1.30	0.19	1.72	1.72	-6.67	38.52 AED	0.93	7.71
EMAAR PROPERT	6.00	-1.48	0.50	7.14	7.14	2.39	53.03 AED	0.77	7.31
Qatar									
QNB	15.18	0.86	-2.06	-5.54	-5.54	-15.67	140.21 QAR	1.38	10.02
INDUSTRIES QAT	12.42	-0.72	-4.75	-4.46	-4.46	-3.04	75.14 QAR	1.79	8.52
QA ISLAMIC BK	17.31	-2.26	-2.59	-2.64	-2.64	-6.73	40.90 QAR	1.53	10.58
MASRAF AL RAYA	2.60	-0.76	-3.49	-12.01	-12.01	-18.01	24.18 QAR	1.03	19.77
MESAIEED PETRO	1.98	0.92	0.41	2.86	2.86	-7.15	24.81 QAR	1.43	14.04
OMAN									
BANK MUSCAT	0.272	-0.37	-1.09	-1.09	-1.09	-1.09	2.04 OMR	0.91	8.33
OMANTEL	1.020	14.86	0.49	-7.27	-7.27	10.87	0.77 OMR	1.20	7.69
BANK DHOFAR	0.155	-3.13	-3.13	-3.13	-3.13	-11.43	0.46 QAR	0.65	14.93
NAT BANK OF OMAN	0.282	0.71	-0.70	5.22	5.22	-2.42	0.46 QAR	0.72	12.71
OMINVEST	0.422	0.00	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, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.04 %The leading sector bottom performance indices today are Telecom -1.1 % Financial services -0.59 % Consumer services -0.45 % respectively.

KSA

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U.A.E

ETISALAT .AD have negative performance today by -2.09 %, FAB.AD have negative performance today by -0.6 %.



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NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw