



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, January 19th 2023





Market Watch

Thursday, January 19, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,682.01	0.17	-0.58	1.94	1.94	1.94	9,984 SAR	1.70	15.44
Qatar (QE Index)	10,810.57	2.12	-1.63	1.21	1.21	1.21	553 QAR	1.37	12.26
Dubai (DFMGI)	3,352.50	0.11	1.20	0.51	0.51	0.51	484 AED	1.21	13.01
Abu Dhabi (ADI)	10,186.71	-0.48	0.38	-0.19	-0.19	-0.19	1,435 AED	1.99	19.65
Bahrain (BAX)	1,927.19	0.83	1.94	1.68	1.68	1.68	20 BHD	1.70	15.07
MUSCAT SE INDEX	4,798.46	-0.80	-1.66	-1.21	-1.21	-1.21	5 OMR	0.95	13.25
SP GCC Comp LMC	180.98	0.44	-0.11	1.22	1.22	1.22			
SP UAE PRICE INDEX	139.04	-0.41	1.28	1.12	1.12	1.12			

Developed Markets

MSCI World Index	2,725.40	-1.04	-1.28	3.17	3.17	3.17			
U.S. (S&P 500)	3,972.61	-0.76	-2.12	1.55	1.55	1.55			
U.K. (FTSE 100)	7,770.59	-1.07	-0.60	3.97	3.97	3.97			
Japan (Topix)	1,926.87	-1.00	0.39	1.26	1.26	1.26			

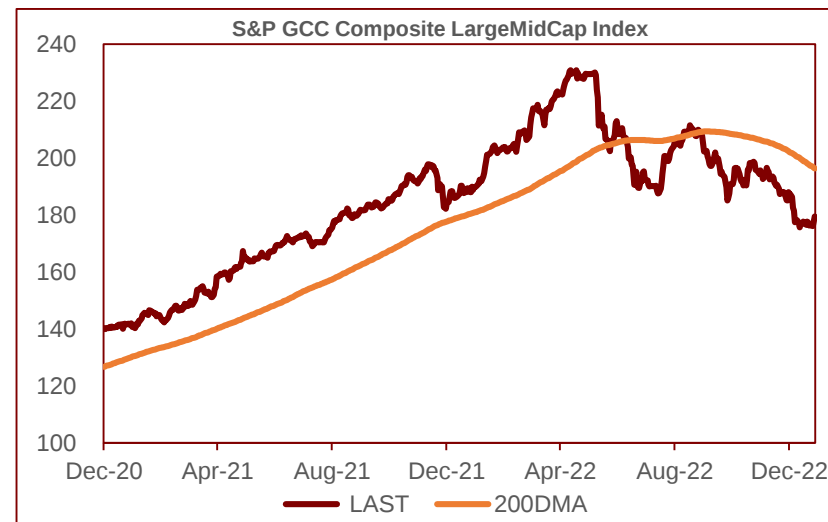
Emerging Markets

MSCI EM Index	1,036.24	-0.21	0.94	7.48	7.48	7.48			
China (SSE Composite)	3,264.81	0.49	2.43	4.89	4.89	4.89			
India (Sensex)	60,621.77	-0.31	1.50	0.03	0.03	0.03			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,256.91	0.60	1.76	-0.48	-0.48	-0.48	46.90 KWD	2.11	28.29
Kuwait Premier Index	8,057.77	0.71	2.06	-0.71	-0.71	-0.71	36.84 KWD	2.24	24.46
Kuwait Main Index	5,621.41	0.16	0.59	0.44	0.44	0.44	10.06 KWD	1.64	42.40
NIC 50	9,027.99	0.74	2.05	-0.72	-0.72	5.93	28.60 KWD	2.22	23.46

Kuwait Sector

Banking	1,806.66	0.85	2.14	0.71	0.71	0.71	30.40 KWD	1.35	25.46
Telecom	1,212.69	1.69	4.19	2.64	2.64	2.64	3.72 KWD	2.01	11.98
Industrials	967.76	-0.26	-0.58	-10.30	-10.30	-10.30	3.40 KWD	0.77	17.98
Financial services	1,259.06	-0.71	1.79	0.14	0.14	0.14	3.58 KWD	0.74	16.51
Real estate	1,175.53	0.24	-0.14	-2.75	-2.75	-2.75	2.55 KWD	0.59	23.87
Basic materials	843.44	-0.36	0.75	-2.50	-2.50	-2.50	0.76 KWD	1.28	8.15
Health care	443.69	-3.93	-3.93	-3.93	-3.93	-3.93	0.22 KWD	2.47	11.92
Consumer services	493.31	-0.27	2.56	2.78	2.78	2.78	0.71 KWD	0.94	11.18
Insurance	1,549.93	0.33	-0.21	-0.06	-0.06	-0.06	0.64 KWD	0.80	9.50
Consumer Disc	1,394.67	0.44	-1.62	-6.20	-6.20	-6.20	0.15 KWD	0.98	0.00
Energy	1,114.22	-1.43	-1.37	-2.13	-2.13	-2.13	0.23 KWD	0.80	4.54
Technology	732.59	-5.00	2.75	5.22	5.22	5.22	0.01 KWD	0.90	0.00
Utilities	476.32	0.56	-2.16	-3.72	-3.72	-3.72	0.20 KWD	1.68	14.88



What Move the GCC markets

Oil Prices

Oil futures fell Thursday, extending losses from the previous day, as a surprise jump in U.S. crude stocks weighed on the market along with fears of a recession that were heightened by disappointing U.S. retail sales and output data. Brent crude futures lost 83 cents, or 1%, to \$84.15 a barrel

Kuwait Market

The market closed up today by + 0.60% at 7,256.91 value traded 52.6 million KD, Premier market value traded reached 37.2 million KD up by + 0.71% at 8,057.77.

KSA Market

The market closed up today by + 0.17% at 10,682.01.

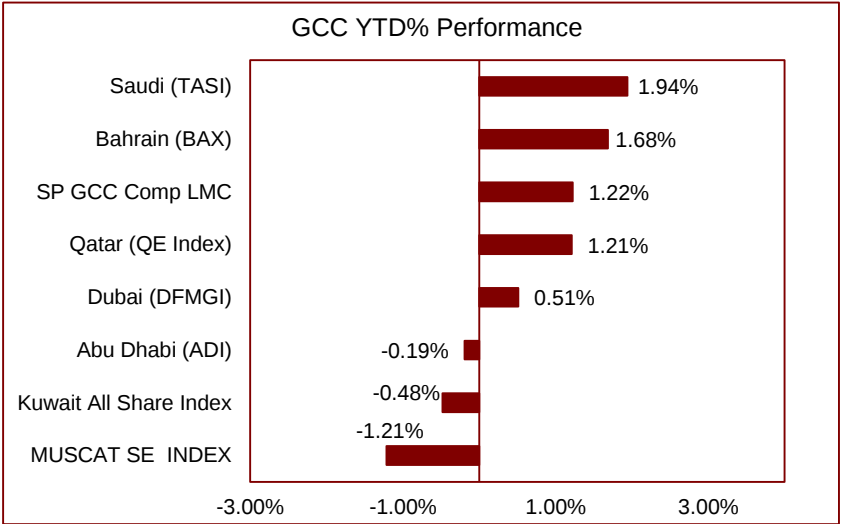


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.100	1.85	2.80	2.04	2.04	2.04	8.30 KWD	2.11	27.00
KFH	0.820	0.61	2.24	-0.36	-0.36	-0.36	11.00 KWD	3.38	32.00
Zain	0.560	0.72	3.32	-0.53	-0.53	-0.53	2.42 KWD	2.01	11.98
BOUBYAN BANK	0.809	1.13	4.12	1.38	1.38	1.38	3.02 KWD	3.21	34.00
Agility	0.584	-0.17	-1.85	-18.89	-18.89	-18.89	1.56 KWD	1.08	38.17
Saudi Arabia									
ARAMCO	32.20	0.16	0.16	0.31	0.31	0.31	7,089.85 SAR	5.10	12.29
SABIC	94.50	-0.63	-0.21	5.70	5.70	5.70	283.73 SAR	1.55	35.00
STC	37.50	0.67	-0.53	2.46	2.46	2.46	187.65 SAR	2.55	15.46
AL-RAJHI BANK	77.70	0.26	-0.26	3.32	3.32	3.32	311.06 SAR	3.61	20.38
NCB	48.05	-0.93	-3.51	-4.85	-4.85	-4.85	215.35 SAR	1.31	11.70
United Arab Emirates									
ETISALAT.AD	25.70	-0.39	4.39	12.42	12.42	12.42	206.60 AED	5.10	21.10
FAB.AD	15.70	-0.63	-0.25	-8.19	-8.19	-8.19	173.45 AED	1.54	12.47
EMIRATES NBD	12.70	-0.78	-0.78	-2.31	-2.31	-2.31	81.17 AED	0.92	7.58
DB ISLAMIC BK	5.60	-0.36	1.63	-1.75	-1.75	-1.75	40.33 AED	0.99	8.18
EMAAR PROPERT	5.85	0.69	0.52	-0.17	-0.17	-0.17	52.06 AED	0.74	6.74
Qatar									
QNB	17.60	3.53	-1.95	-2.22	-2.22	-2.22	162.56 QAR	1.55	12.25
INDUSTRIES QAT	13.71	3.47	1.03	7.03	7.03	7.03	82.95 QAR	2.05	8.73
QA ISLAMIC BK	19.00	3.26	-4.19	2.37	2.37	2.37	44.90 QAR	1.65	11.76
MASRAF AL RAYA	3.03	1.81	-5.78	-4.32	-4.32	-4.32	28.22 QAR	1.17	18.99
MESAIEED PETRO	2.17	0.23	-2.03	2.02	2.02	2.02	27.26 QAR	1.59	14.39
OMAN									
BANK MUSCAT	0.279	-0.36	0.36	1.45	1.45	1.45	2.09 OMR	0.96	8.33
OMANTEL	0.948	6.76	0.85	3.04	3.04	3.04	0.71 OMR	1.20	7.69
BANK DHOFAR	0.170	-5.03	-5.03	-2.86	-2.86	-2.86	0.51 QAR	0.72	14.93
NAT BANK OF OMAN	0.285	0.00	-1.38	-1.38	-1.38	-1.38	0.46 QAR	0.80	12.71
OMINVEST	0.420	0.00	-2.33	0.00	0.00	0.00	0.28 QAR	0.84	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
11-Jan 23	24.71%	17.26%	0.06%	1.30%	0.37%	4.48%	17.68%	12.26%	5.85%	5.12%
18-Jan 23	24.67%	17.07%	0.06%	1.33%	0.37%	4.50%	17.67%	12.29%	5.86%	5.16%

End of Report
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Sources, Boursa 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 1.69 % Banking 0.85 % Utilities 0.56 % respectively

KSA
Saudi Armco has a positive performance today by + 0.16 %, SABIC has a negative performance today by -0.63 %, STC has a positive performance today by + 0.67 %, Al Rajhi Bank has a positive performance today by + 0.26 %

U.A.E
ETISALAT .AD has a negative performance today by -0.39 %, FAB.AD has a negative performance today by -0.63 %



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