



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

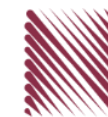
GCC DAILY MORNING BRIEF

Monday, June 19th 2023



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

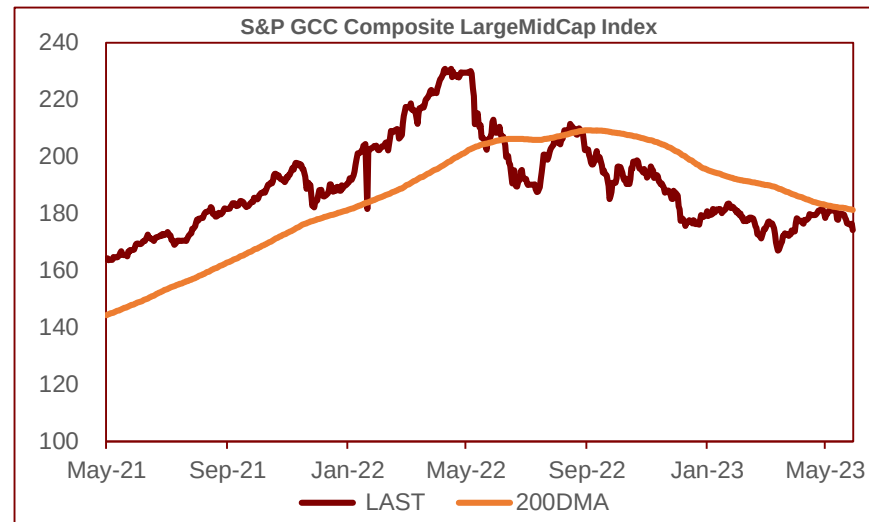


Market Watch

Monday, June 19, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,421.70	-0.83	0.22	3.70	7.85	9.00	10,845 SAR	2.06	18.43
Qatar (QE Index)	10,282.04	0.16	0.24	1.25	0.68	-3.74	548 QAR	1.41	11.46
Dubai (DFMGI)	3,787.07	-0.05	2.70	5.88	11.16	13.52	541 AED	1.42	19.59
Abu Dhabi (ADI)	9,453.32	0.07	1.09	0.50	0.24	-7.42	1,435 AED	1.80	20.78
Bahrain (BAX)	1,957.53	-0.03	0.16	-0.30	3.76	3.28	20 BHD	6.46	18.00
MUSCAT SE INDEX	4,679.97	-0.06	0.46	1.16	-3.77	-3.65	5 OMR	1.00	13.25
SP GCC Comp LMC	179.27	-0.53	0.58	2.90	3.22	0.28			
SP UAE PRICE INDEX	134.21	-0.19	2.44	2.52	4.87	-2.39			
Developed Markets									
MSCI World Index	2,955.12	-0.24	2.53	5.52	5.86	13.54			
U.S. (S&P 500)	4,409.59	0.00	2.69	5.50	7.31	14.85			
U.K. (FTSE 100)	7,588.48	-0.71	-0.15	1.91	-0.57	1.84			
Japan (Topix)	2,290.50	-0.43	4.52	7.50	14.32	21.08			
Emerging Markets									
MSCI EM Index	1,023.42	-0.64	2.95	6.77	3.35	7.01			
China (SSE Composite)	3,255.81	-0.54	1.31	1.60	-0.52	5.39			
India (Sensex)	63,168.30	-0.34	0.51	0.87	7.08	3.83			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,042.54	-0.07	2.68	3.62	-0.12	-3.42	45.49 KWD	1.70	18.21
Kuwait Premier Index	7,822.77	0.02	2.87	4.38	0.01	-3.61	35.54 KWD	1.66	18.06
Kuwait Main Index	5,475.66	-0.42	1.94	0.64	-0.46	-2.16	9.95 KWD	1.82	18.76
NIC 50	8,902.84	0.14	2.86	4.37	0.00	-1.99	28.60 KWD	1.64	17.06
Kuwait Sector									
Banking	1,704.95	0.02	1.81	3.30	-2.73	-4.96	28.70 KWD	1.22	19.06
Telecom	1,107.98	-0.31	1.66	1.06	-2.14	-6.22	3.40 KWD	1.36	8.80
Industrials	1,005.76	-0.39	3.45	3.96	1.91	-6.78	3.54 KWD	0.82	20.92
Financial services	1,239.17	-0.22	4.93	4.64	3.61	-1.44	3.58 KWD	0.74	20.19
Real estate	1,212.91	-0.03	7.84	8.79	12.29	0.35	2.62 KWD	0.59	22.34
Basic materials	970.44	-0.12	3.92	5.64	13.22	12.18	0.83 KWD	1.54	8.55
Health care	458.52	1.61	2.30	-0.07	0.67	-0.72	0.23 KWD	0.97	6.82
Consumer services	591.74	3.75	12.73	17.61	32.89	23.29	0.78 KWD	0.87	14.36
Insurance	2,163.02	-0.94	2.58	1.26	13.25	39.48	0.89 KWD	0.81	10.92
Consumer Disc	1,582.82	-0.45	2.37	2.79	8.27	6.46	0.18 KWD	1.08	0.00
Energy	987.78	-2.89	-1.43	-0.22	-1.01	-13.24	0.21 KWD	0.72	4.38
Technology	646.75	0.00	3.37	-6.32	1.72	-7.11	0.01 KWD	0.80	0.00
Utilities	515.79	4.25	8.29	6.52	10.73	4.25	0.22 KWD	1.97	16.05



What Move the GCC markets

Oil Prices

Oil prices were mixed on Tuesday ahead of a decision on lending benchmarks by China, with the world's second-largest economy widely expected to cut key rates to shore up a slowing recovery. Brent crude was 3 cents higher at \$76.12 a barrel.

Kuwait Market

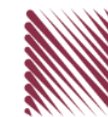
The market closed down today by – 0.07% at 7,042.54 value traded 39.8 million KD, Premier market value traded reached 30 million KD up + 0.02% at 7,822.77.

KSA Market

The market closed down today by – 0.83% at 11,421.70.

DAILY MARKETS WRAP,

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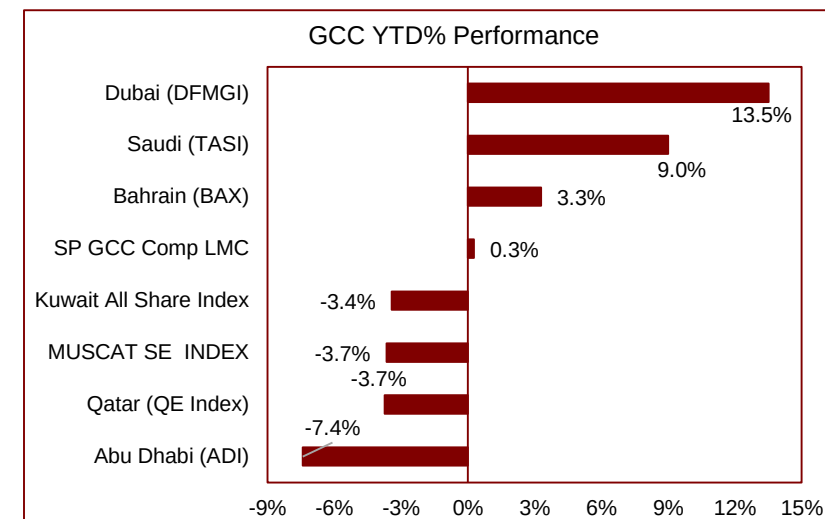
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.940	0.11	0.86	2.17	-6.53	-8.44	7.45 KWD	1.89	27.00
KFH	0.743	-0.13	2.34	5.09	-1.05	-0.69	10.97 KWD	1.89	32.00
Zain	0.519	-0.19	1.57	-0.19	-3.89	-7.82	2.25 KWD	1.75	11.06
BOUBYAN BANK	0.640	0.47	3.73	6.67	5.51	-14.99	2.54 KWD	2.86	34.00
Agility	0.635	-1.24	3.76	3.93	2.25	-11.81	1.70 KWD	0.89	22.89
Saudi Arabia									
ARAMCO	32.10	-0.62	-1.08	1.90	9.32	10.00	7,769.03 SAR	5.21	13.90
SABIC	88.10	-0.68	-1.01	-0.11	-2.44	-1.45	264.33 SAR	1.41	35.00
STC	43.70	-0.68	0.92	1.04	9.11	19.40	218.52 SAR	2.92	17.94
AL-RAJHI BANK	72.80	-1.36	-0.82	2.97	-0.95	-3.19	291.23 SAR	2.93	17.20
NCB	37.00	-0.54	-2.12	0.27	8.13	-1.83	222.02 SAR	1.29	12.01
United Arab Emirates									
ETISALAT.AD	22.42	-0.27	0.00	-2.86	1.63	-1.92	206.60 AED	5.10	21.10
FAB.AD	13.46	0.45	4.83	5.98	4.50	-21.29	148.71 AED	1.33	12.68
EMIRATES NBD	14.90	0.00	6.43	9.16	13.31	14.62	94.13 AED	0.98	5.63
DB ISLAMIC BK	5.45	-0.91	2.44	3.61	4.21	-4.39	39.47 AED	0.98	7.58
EMAAR PROPERT	6.53	-0.91	7.40	6.18	16.61	11.43	57.72 AED	0.81	6.88
Qatar									
QNB	16.30	0.74	1.24	1.81	1.43	-9.44	150.35 QAR	1.48	10.76
INDUSTRIES QAT	11.40	-1.98	-3.06	-4.84	-12.31	-11.01	68.88 QAR	1.89	9.48
QA ISLAMIC BK	18.00	0.17	0.84	2.74	1.24	-3.02	42.47 QAR	1.60	11.00
MASRAF AL RAYA	2.62	-0.30	0.42	2.86	-11.24	-17.28	24.36 QAR	1.04	19.95
MESAIEED PETRO	1.97	0.00	-2.24	-0.20	2.34	-7.62	24.65 QAR	1.51	15.50
OMAN									
BANK MUSCAT	0.266	0.76	-0.37	1.53	-3.27	-3.27	2.00 OMR	0.92	8.33
OMANTEL	0.976	9.91	0.41	1.24	-11.27	6.09	0.73 OMR	1.20	7.69
BANK DHOFAR	0.174	-0.57	0.58	-0.57	8.75	-0.57	0.52 QAR	0.73	14.93
NAT BANK OF OMAN	0.275	-1.79	0.73	0.73	2.61	-4.84	0.45 QAR	0.69	12.71
OMINVEST	0.360	1.12	-1.64	-2.70	-27.42	-14.29	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 down today by -0.07 %The leading sector bottom performance indices today are Energy -2.89 % Insurance -0.94 % Consumer Disc -0.45 % respectively.

KSA

Saudi Armco have negative performance today by -0.62 %, SABIC have negative performance today by -0.67%. STC have negative performance today by -0.68 %, Al Rajhi Bank have negative performance today by -1.36 %

U.A.E

ETISALAT .AD have negative performance today by -0.27 %, FAB.AD has a positive performance today by + 0.45 %.



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