

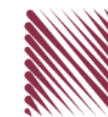


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, June 1st 2023



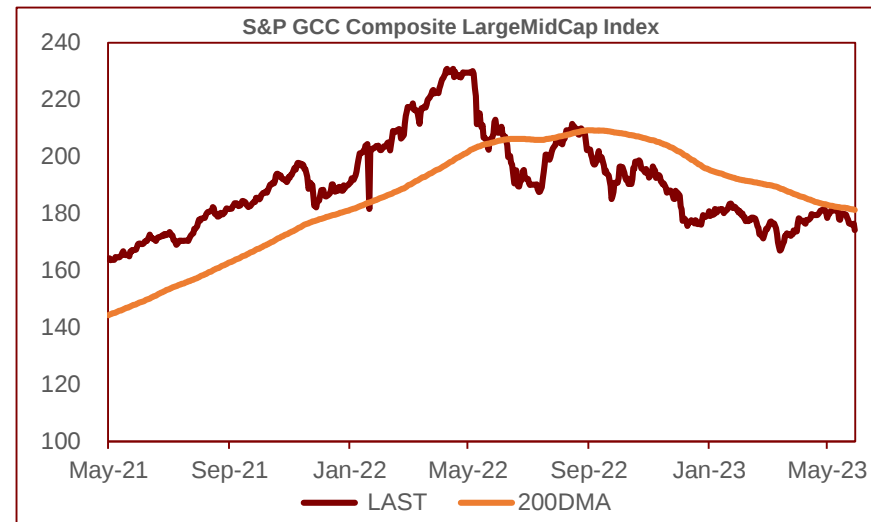


Market Watch

Thursday, June 1, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,014.95	0.01	-1.52	0.01	4.01	5.12	10,610 SAR	1.97	17.82
Qatar (QE Index)	10,208.90	0.53	-2.36	0.53	-0.04	-4.42	545 QAR	1.36	11.23
Dubai (DFMGI)	3,603.25	0.15	1.60	0.15	5.15	7.38	514 AED	1.35	17.15
Abu Dhabi (ADI)	9,406.08	-0.43	-0.36	-0.43	-0.68	-8.27	1,435 AED	1.77	20.59
Bahrain (BAX)	1,957.96	-0.28	-0.22	-0.28	3.78	3.31	20 BHD	1.65	17.64
MUSCAT SE INDEX	4,630.63	0.09	-0.24	0.09	-4.78	-4.67	5 OMR	0.99	13.25
SP GCC Comp LMC	174.32	-0.13	-1.47	-0.13	0.18	-2.68			
SP UAE PRICE INDEX	131.45	-0.60	0.18	-0.60	1.68	-5.37			
Developed Markets									
MSCI World Index	2,873.37	1.11	1.24	1.11	1.44	8.80			
U.S. (S&P 500)	4,282.37	0.99	1.68	0.99	2.72	9.94			
U.K. (FTSE 100)	7,607.28	0.59	-1.06	0.59	-1.85	0.52			
Japan (Topix)	2,182.70	0.88	0.15	0.88	7.28	13.62			
Emerging Markets									
MSCI EM Index	984.36	0.34	-0.23	0.34	-2.88	0.57			
China (SSE Composite)	3,230.07	0.00	0.11	0.00	-2.08	3.73			
India (Sensex)	62,547.11	-0.31	0.90	-0.31	5.83	2.61			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,787.14	-0.14	0.33	-0.14	-3.74	-6.93	43.99 KWD	1.64	17.37
Kuwait Premier Index	7,480.23	-0.19	0.22	-0.19	-4.37	-7.83	34.17 KWD	1.59	17.07
Kuwait Main Index	5,443.77	0.06	0.72	0.06	-1.04	-2.73	9.83 KWD	1.82	18.46
NIC 50	8,565.81	-0.29	0.21	-0.20	-4.38	-5.70	28.60 KWD	1.57	16.07
Kuwait Sector									
Banking	1,648.95	-0.09	-0.25	-0.09	-5.93	-8.08	27.87 KWD	1.18	18.07
Telecom	1,097.52	0.10	2.87	0.10	-3.07	-7.10	3.37 KWD	1.33	8.65
Industrials	962.39	-0.52	0.21	-0.52	-2.49	-10.80	3.39 KWD	0.79	19.58
Financial services	1,182.96	-0.10	1.01	-0.10	-1.09	-5.91	3.41 KWD	0.69	19.01
Real estate	1,110.32	-0.41	0.83	-0.41	2.79	-8.14	2.41 KWD	0.54	20.82
Basic materials	926.35	0.84	2.89	0.84	8.07	7.08	0.80 KWD	1.54	6.24
Health care	451.56	-1.58	-1.58	-1.58	-0.86	-2.23	0.22 KWD	0.93	6.50
Consumer services	508.49	1.07	-2.13	1.07	14.20	5.95	0.75 KWD	0.84	13.95
Insurance	2,150.80	0.68	0.32	0.68	12.61	38.69	0.89 KWD	0.77	8.71
Consumer Disc	1,518.46	-1.39	2.09	-1.39	3.86	2.13	0.15 KWD	0.95	0.00
Energy	1,001.74	1.19	0.38	1.19	0.39	-12.01	0.21 KWD	0.72	4.24
Technology	675.85	-2.11	16.27	-2.11	6.29	-2.93	0.01 KWD	0.84	0.00
Utilities	476.32	-1.63	-0.55	-1.63	2.26	-3.72	0.20 KWD	1.82	14.82



What Move the GCC markets

Oil Prices

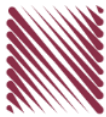
Oil prices rose more than 2% on Friday after the U.S. Congress passed a debt ceiling deal that averted a government default in the world's biggest oil consumer and jobs data fed hopes for a possible pause in interest rate hikes ahead of a meeting of OPEC and its allies this weekend. Brent futures settled up 2.49% to \$76.13 a barrel.

Kuwait Market

The market closed down today by - 0.14% at 6,787.14 value traded 37.5 million KD, Premier market value traded reached 25.4 million KD down by - 0.19% at 7,480.23

KSA Market

The market closed up today by + 0.01% at 11,014.95.

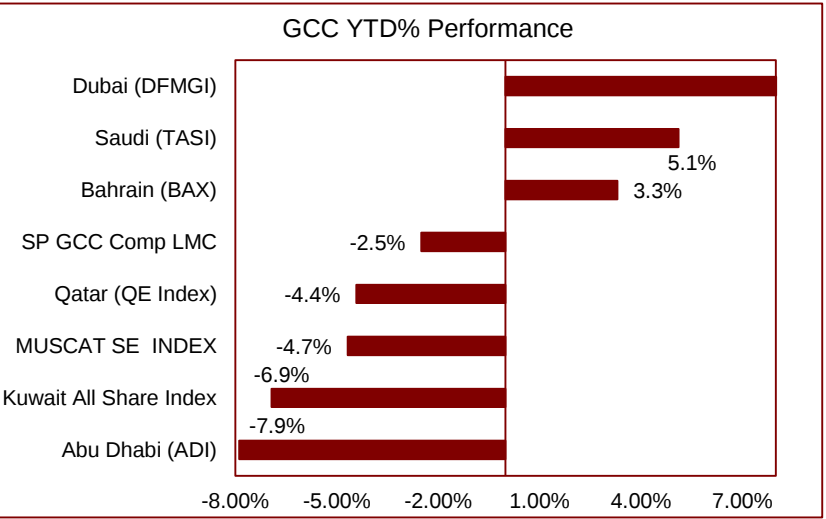


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.917	-0.33	-0.65	-0.33	-8.82	-10.68	7.27 KWD	1.84	27.00
KFH	0.710	0.42	0.14	0.42	-5.45	-5.10	10.48 KWD	1.81	32.00
Zain	0.515	-0.96	1.78	-0.96	-4.63	-8.53	2.23 KWD	1.74	10.98
BOUBYAN BANK	0.600	0.00	0.67	0.00	-1.09	-20.30	2.38 KWD	2.68	34.00
Agility	0.607	-0.65	0.33	-0.65	-2.25	-15.69	1.62 KWD	0.85	21.88
Saudi Arabia									
ARAMCO	31.65	0.48	-0.78	0.48	7.79	8.46	7,658.07 SAR	5.13	13.56
SABIC	88.30	0.11	-2.00	0.11	-2.21	-1.23	264.90 SAR	1.42	35.00
STC	42.25	-2.31	-0.94	-2.31	5.49	15.44	211.22 SAR	2.82	17.64
AL-RAJHI BANK	72.30	2.26	-0.69	2.26	-1.63	-3.86	289.15 SAR	2.91	16.48
NCB	36.65	-0.68	-2.40	-0.68	7.10	-2.76	219.90 SAR	1.28	11.91
United Arab Emirates									
ETISALAT.AD	22.50	-2.51	-1.06	-2.51	1.99	-1.57	206.60 AED	5.10	21.10
FAB.AD	12.70	0.00	-1.55	0.00	-1.40	-25.73	142.51 AED	1.27	11.96
EMIRATES NBD	13.65	0.00	0.37	0.00	3.80	5.00	87.17 AED	0.91	5.16
DB ISLAMIC BK	5.27	0.19	1.93	0.19	0.76	-7.54	38.38 AED	0.95	7.33
EMAAR PROPERT	6.06	-1.46	3.59	-1.46	8.21	3.41	53.92 AED	0.76	6.39
Qatar									
QNB	16.06	0.31	-2.67	0.31	-0.06	-10.78	148.34 QAR	1.46	10.60
INDUSTRIES QAT	12.00	0.17	-6.03	0.17	-7.69	-6.32	72.60 QAR	1.99	9.98
QA ISLAMIC BK	17.71	1.08	-0.56	1.08	-0.39	-4.58	41.85 QAR	1.57	10.82
MASRAF AL RAYA	2.60	1.96	-2.48	1.96	-12.01	-18.01	24.18 QAR	1.03	19.77
MESAIEED PETRO	1.95	-0.91	-2.64	-0.91	1.61	-8.27	24.51 QAR	1.50	15.39
OMAN									
BANK MUSCAT	0.264	0.76	1.93	0.76	-4.00	-4.00	1.97 OMR	0.91	8.33
OMANTEL	0.960	8.11	0.00	-0.41	-12.73	4.35	0.72 OMR	1.18	7.69
BANK DHOFAR	0.175	0.00	-0.57	0.00	9.38	0.00	0.52 QAR	0.74	14.93
NAT BANK OF OMAN	0.273	0.00	1.11	0.00	1.87	-5.54	0.44 QAR	0.69	12.71
OMINVEST	0.370	0.00	-2.63	0.00	-25.40	-11.90	0.25 QAR	0.69	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
17-May 23	24.73%	15.98%	0.06%	1.35%	0.23%	4.62%	17.67%	14.04%	6.07%	4.96%
24-May 23	24.55%	15.75%	0.06%	1.35%	0.23%	4.61%	17.69%	14.02%	6.09%	4.96%

End of Report
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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is down today by -0.14 %The leading sector bottom performance indices today are Technology -2.11 % Utilities -1.63 % Health care -1.58 % respectively

KSA
Saudi Armco has a positive performance today by + 0.48 %, SABIC have positive performance today by + 0.11 %. STC have negative performance today by -2.31 %, Al Rajhi Bank has a positive performance today by + 2.26 %

U.A.E
ETISALAT .AD have negative performance today by -2.51 %, FAB.AD flat performance today 0 %.



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