



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, March 1st 2023





Market Watch

Wednesday, March 1, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	10,192.26	0.89	0.38	0.89	-2.73	-2.73	9,691 SAR	1.67	14.94
Qatar (QE Index)	10,571.82	0.01	0.95	0.01	-1.02	-1.02	537 QAR	1.33	11.51
Dubai (DFMGI)	3,447.05	0.27	1.03	0.27	3.33	3.33	496 AED	1.20	19.45
Abu Dhabi (ADI)	9,853.93	0.09	0.10	0.09	-3.50	-3.50	1,435 AED	1.90	23.19
Bahrain (BAX)	1,931.92	0.00	-0.38	0.00	1.93	1.93	20 BHD	1.73	15.91
MUSCAT SE INDEX	4,780.57	0.57	2.80	0.57	-1.58	-1.58	5 OMR	0.95	13.25
SP GCC Comp LMC	173.54	0.65	0.48	0.65	-2.93	-2.93			
SP UAE PRICE INDEX	136.23	-0.01	0.70	-0.01	-0.92	-0.92			

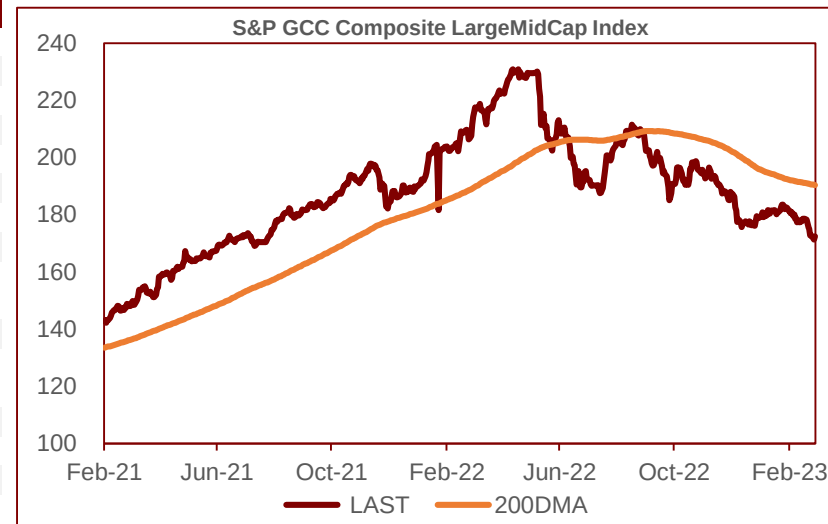
Developed Markets

MSCI World Index	2,706.79	-0.29	-1.12	-0.29	4.00	4.00			
U.S. (S&P 500)	3,951.39	-0.47	-1.52	-0.47	2.91	2.91			
U.K. (FTSE 100)	7,914.93	0.49	0.09	0.49	6.22	6.22			
Japan (Topix)	1,993.20	0.23	1.14	0.23	5.61	5.61			

Emerging Markets

MSCI EM Index	984.19	2.09	-0.36	2.09	2.91	2.91			
China (SSE Composite)	3,312.25	1.00	0.76	1.00	7.22	7.22			
India (Sensex)	59,139.55	0.76	-0.33	0.76	-2.35	-2.35			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	7,256.34	0.16	-0.15	0.16	-0.49	-0.49	46.93 KWD	1.74	27.87
Kuwait Premier Index	8,087.39	0.22	-0.23	0.22	-0.35	-0.35	36.98 KWD	1.76	23.24
Kuwait Main Index	5,544.30	-0.08	0.22	-0.08	-0.94	-0.94	9.96 KWD	1.67	45.18
NIC 50	9,040.79	0.20	-0.24	0.21	-0.36	-0.47	28.60 KWD	1.74	22.24
Kuwait Sector									
Banking	1,815.84	0.33	-0.25	0.33	1.22	1.22	30.57 KWD	1.30	24.24
Telecom	1,171.61	0.01	0.90	0.01	-0.83	-0.83	3.59 KWD	2.00	11.90
Industrials	988.95	-0.15	0.32	-0.15	-8.34	-8.34	3.48 KWD	0.76	18.14
Financial services	1,232.97	-0.25	-0.59	-0.25	-1.93	-1.93	3.52 KWD	0.71	17.15
Real estate	1,137.95	-0.36	0.22	-0.36	-5.85	-5.85	2.47 KWD	0.54	22.13
Basic materials	845.04	0.11	-1.21	0.11	-2.32	-2.32	0.76 KWD	1.28	8.16
Health care	460.03	0.00	0.00	0.00	-0.39	-0.39	0.23 KWD	2.46	13.39
Consumer services	480.62	0.43	-0.21	0.43	0.14	0.14	0.73 KWD	0.90	12.13
Insurance	1,628.53	0.06	-0.13	0.06	5.01	5.01	0.67 KWD	0.83	10.08
Consumer Disc	1,452.70	-0.26	-0.29	-0.26	-2.30	-2.30	0.15 KWD	0.96	0.00
Energy	1,015.49	-0.23	-2.42	-0.23	-10.81	-10.81	0.21 KWD	0.57	4.49
Technology	712.95	5.26	5.26	5.26	2.40	2.40	0.01 KWD	0.87	0.00
Utilities	478.95	0.00	-0.55	0.00	-3.19	-3.19	0.20 KWD	1.69	14.97



What Move the GCC markets

Oil Prices

Oil slipped on Wednesday, giving up an earlier gain, as signs of ample supply and rising U.S. crude inventories countered hopes for higher demand arising from a jump in manufacturing in top crude importer China. Brent crude was down 69 cents, or 0.8%, to \$82.76 a barrel.

Kuwait Market

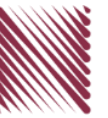
The market closed up today by + 0.16% at 7,256.34 value traded 29.0 million KD, Premier market value traded reached 23.3 million KD up by + 0.22% at 8,087.39.

KSA Market

The market closed up today by + 0.89% at 10,192.26.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



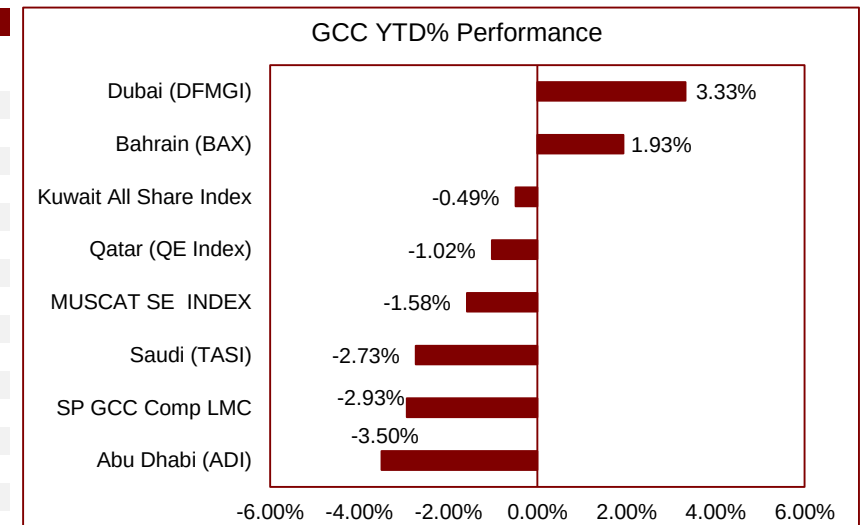
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.083	1.21	0.56	1.21	0.46	0.46	8.18 KWD	2.01	27.00
KFH	0.858	0.12	-1.15	0.12	4.25	4.25	11.51 KWD	1.95	32.00
Zain	0.556	-0.54	0.54	-0.54	-1.24	-1.24	2.40 KWD	2.00	11.90
BOUBAYAN BANK	0.758	-0.92	0.00	-0.92	-5.01	-5.01	2.83 KWD	2.99	34.00
Agility	0.600	-0.50	1.18	-0.50	-16.67	-16.67	1.61 KWD	1.11	39.22
Saudi Arabia									
ARAMCO	31.55	-0.79	-0.79	-0.79	-1.71	-1.71	6,940.82 SAR	5.00	12.15
SABIC	89.10	0.68	-1.98	0.68	-0.34	-0.34	267.29 SAR	1.46	35.00
STC	35.70	1.56	2.88	1.56	-2.46	-2.46	178.50 SAR	2.42	14.42
AL-RAJHI BANK	72.10	2.56	-0.28	2.56	-4.12	-4.12	288.39 SAR	2.88	18.02
NCB	47.00	-0.53	-1.78	-0.53	-6.93	-6.93	210.46 SAR	1.26	11.53
United Arab Emirates									
ETISALAT.AD	25.36	-0.55	-1.01	-0.55	10.94	10.94	206.60 AED	5.10	21.10
FAB.AD	14.06	-0.14	-0.28	-0.14	-17.78	-17.78	155.33 AED	1.35	11.91
EMIRATES NBD	13.60	0.00	1.87	0.00	4.62	4.62	85.91 AED	0.92	6.87
DB ISLAMIC BK	5.74	0.00	1.77	0.00	0.70	0.70	41.56 AED	1.00	8.22
EMAAR PROPERT	5.65	0.89	4.63	0.89	-3.58	-3.58	49.94 AED	0.71	6.81
Qatar									
QNB	16.59	-1.54	2.98	-1.54	-7.83	-7.83	153.23 QAR	1.46	11.54
INDUSTRIES QAT	13.95	0.22	0.79	0.22	8.90	8.90	84.40 QAR	2.01	9.57
QA ISLAMIC BK	18.55	-0.27	1.20	-0.27	-0.05	-0.05	43.83 QAR	1.61	11.48
MASRAF AL RAYA	2.70	0.00	-1.42	0.00	-14.85	-14.85	25.11 QAR	1.04	17.13
MESAIEED PETRO	2.12	1.00	0.71	1.00	-0.24	-0.24	26.66 QAR	1.53	15.08
OMAN									
BANK MUSCAT	0.290	-0.68	1.75	-0.68	5.45	5.45	2.18 OMR	0.98	8.33
OMANTEL	0.964	8.56	3.43	0.42	4.78	4.78	0.72 OMR	1.22	7.69
BANK DHOFAR	0.152	0.00	0.66	0.00	-13.14	-13.14	0.46 QAR	0.64	14.93
NAT BANK OF OMAN	0.270	1.50	2.27	1.50	-6.57	-6.57	0.44 QAR	0.69	12.71
OMINVEST	0.480	5.26	14.29	5.26	14.29	14.29	0.32 QAR	0.95	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
15-Feb 23	24.78%	16.71%	0.06%	1.35%	0.40%	4.42%	17.68%	15.25%	5.85%	5.16%
22-Feb 23	24.76%	16.65%	0.06%	1.34%	0.42%	4.46%	17.71%	15.22%	5.84%	5.12%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.16 %The leading sector best performance indices today are Technology 5.26 % Consumer services 0.43 % Banking 0.33 % respectively

KSA

Saudi Armco has a negative performance today by -0.79 %, SABIC has a positive performance today by + 0.68 %, STC has a positive performance today by + 1.56 %, Al Rajhi Bank has a positive performance today by + 2.56 %

U.A.E

ETISALAT .AD has a negative performance today by -0.55 %, FAB.AD has a negative performance today by -0.14 %



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