

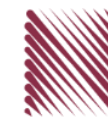


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, April 20th 2023





Market Watch

Thursday, April 20th 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,265.11	1.19	1.81	5.42	5.42	6.54	10,952 SAR	1.82	18.35
Qatar (QE Index)	9,930.33	-0.18	-1.58	-2.76	-2.76	-7.03	522 QAR	1.27	10.61
Dubai (DFMGI)	3,506.38	-1.16	-0.47	1.89	1.89	4.04	501 AED	1.22	23.04
Abu Dhabi (ADI)	9,646.47	-0.04	0.79	2.16	2.16	-5.65	1,435 AED	1.75	20.90
Bahrain (BAX)	1,887.37	0.12	0.31	0.04	0.04	-0.42	20 BHD	1.62	18.00
MUSCAT SE INDEX	4,743.92	-0.12	-1.41	-2.46	-2.46	-2.35	5 OMR	1.02	13.25
SP GCC Comp LMC	180.28	0.01	1.00	3.34	3.34	0.39			
SP UAE PRICE INDEX	134.26	-0.01	0.59	4.09	4.09	-3.12			

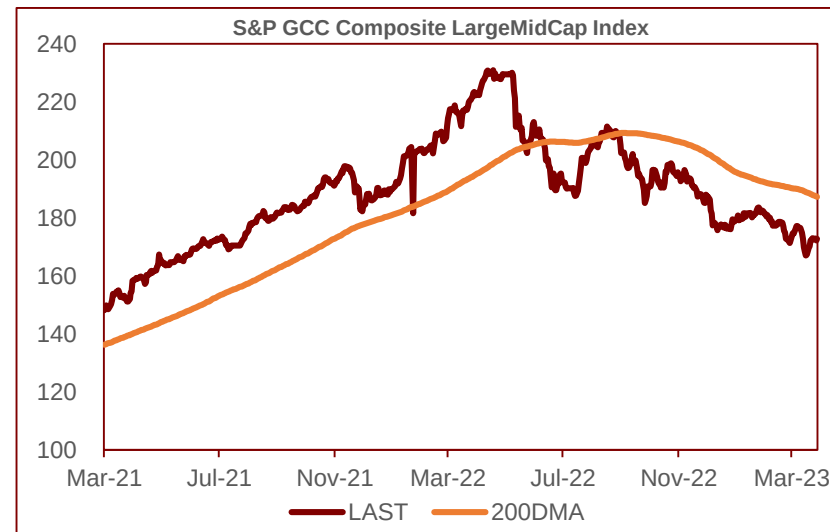
Developed Markets

MSCI World Index	2,789.54	-0.38	-0.24	1.11	1.11	8.45			
U.S. (S&P 500)	4,071.63	-0.60	-0.40	0.50	0.50	7.56			
U.K. (FTSE 100)	7,891.13	0.05	0.76	3.55	3.55	6.05			
Japan (Topix)	2,042.15	-0.03	1.58	1.81	1.81	7.82			

Emerging Markets

MSCI EM Index	965.60	-0.06	-0.73	-0.05	-0.05	3.49			
China (SSE Composite)	3,264.87	-0.09	1.47	2.88	2.88	8.99			
India (Sensex)	60,130.71	0.11	-1.32	1.09	1.09	-1.99			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,155.67	0.46	2.37	1.49	1.49	-1.87	46.30 KWD	1.68	21.95
Kuwait Premier Index	7,935.65	0.51	2.28	1.46	1.46	-2.22	36.25 KWD	1.71	22.18
Kuwait Main Index	5,590.37	0.20	2.76	1.63	1.63	-0.11	10.05 KWD	1.57	21.12
NIC 50	8,957.24	0.00	2.27	1.45	1.45	-1.39	28.60 KWD	1.69	21.18
Kuwait Sector									
Banking	1,763.11	0.41	2.19	0.59	0.59	-1.72	29.68 KWD	1.29	23.18
Telecom	1,178.08	0.06	3.71	4.05	4.05	-0.29	3.61 KWD	1.99	6.58
Industrials	996.96	0.18	1.98	1.02	1.02	-7.59	3.51 KWD	0.79	18.09
Financial services	1,234.16	0.47	1.88	3.19	3.19	-1.84	3.59 KWD	0.74	22.67
Real estate	1,132.03	0.84	1.27	4.80	4.80	-6.34	2.45 KWD	0.52	13.82
Basic materials	882.32	3.58	5.40	2.94	2.94	1.99	0.78 KWD	1.59	8.19
Health care	462.45	0.00	0.00	1.53	1.53	0.13	0.23 KWD	1.06	10.54
Consumer services	450.44	0.23	0.38	1.16	1.16	-6.15	0.72 KWD	0.86	14.01
Insurance	2,149.60	2.27	13.35	12.55	12.55	38.61	0.88 KWD	0.77	10.16
Consumer Disc	1,435.95	0.57	0.50	-1.78	-1.78	-3.42	0.14 KWD	0.91	0.00
Energy	1,016.75	0.09	1.86	1.89	1.89	-10.70	0.21 KWD	0.64	4.45
Technology	592.91	-4.90	-4.90	-6.75	-6.75	-14.84	0.01 KWD	0.73	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

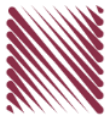
Oil prices slid about 2% to a two-week low on Thursday despite a sharp decline in U.S. crude inventories, as the dollar strengthened on fears that looming Federal Reserve interest rate hikes could curb energy demand in the world's top consumer. Brent futures settled at \$81.10 a barrel.

Kuwait Market

The market closed up today by + 0.46% at 7,155.67 value traded 29.3 million KD, Premier market value traded reached 25.2 million KD up by + 0.51% at 7,935.65

KSA Market

The market closed up today by + 1.19 % at 11,265.11



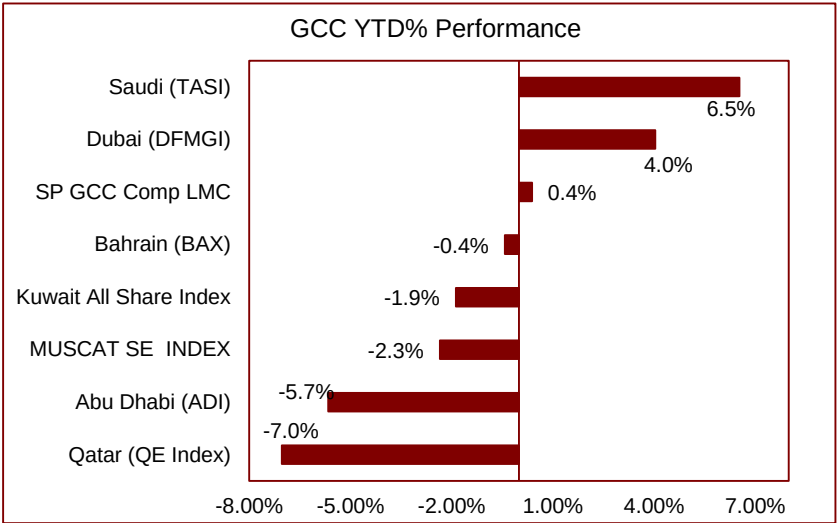
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.995	0.10	3.32	-1.07	-1.07	-3.08	7.88 KWD	2.00	27.00
KFH	0.745	0.27	0.68	-0.79	-0.79	-0.43	10.99 KWD	1.86	32.00
Zain	0.565	0.89	2.73	4.63	4.63	0.36	2.44 KWD	1.99	12.48
BOUBYAN BANK	0.691	2.22	9.68	13.91	13.91	-8.21	2.74 KWD	3.09	34.00
Agility	0.615	0.16	2.84	-0.97	-0.97	-14.58	1.65 KWD	0.98	23.69
Saudi Arabia									
ARAMCO	34.65	4.68	5.48	7.28	7.28	7.94	7,920.21 SAR	5.46	13.04
SABIC	92.00	0.88	0.88	1.88	1.88	2.91	282.01 SAR	1.52	35.00
STC	42.55	1.19	0.12	6.24	6.24	16.26	217.51 SAR	2.95	17.45
AL-RAJHI BANK	76.50	0.00	1.19	4.08	4.08	1.73	308.41 SAR	3.08	19.61
NCB	50.40	1.10	1.31	9.92	9.92	-0.20	223.91 SAR	1.34	12.30
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	148.27 AED	1.29	11.37
EMIRATES NBD	13.20	-0.38	1.54	0.38	0.38	1.54	84.02 AED	0.90	6.72
DB ISLAMIC BK	5.32	-1.30	0.19	1.72	1.72	-6.67	38.52 AED	0.95	7.40
EMAAR PROPERT	6.00	-1.48	0.50	7.14	7.14	2.39	53.04 AED	0.77	7.21
Qatar									
QNB	15.08	-0.66	-2.71	-6.16	-6.16	-16.22	139.29 QAR	1.37	9.96
INDUSTRIES QAT	12.33	-0.72	-5.44	-5.15	-5.15	-3.75	74.60 QAR	1.78	8.46
QA ISLAMIC BK	17.45	0.81	-1.80	-1.86	-1.86	-5.98	41.23 QAR	1.55	10.66
MASRAF AL RAYA	2.57	-1.19	-4.64	-13.06	-13.06	-18.98	23.89 QAR	1.01	19.54
MESAIEED PETRO	1.97	-0.15	0.25	2.71	2.71	-7.29	24.77 QAR	1.42	14.02
OMAN									
BANK MUSCAT	0.272	0.00	-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	1.22	7.69
BANK DHOFAR	0.155	0.00	-3.13	-3.13	-3.13	-11.43	0.46 QAR	0.65	14.93
NAT BANK OF OMAN	0.282	0.00	-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
12-April 23	24.87%	16.21%	0.06%	1.38%	0.41%	4.65%	17.70%	14.35%	6.12%	5.06%
19-April 23	24.85%	16.25%	0.06%	1.38%	0.42%	4.67%	17.70%	14.29%	6.13%	5.07%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.46 %The leading sector best performance indices today are Basic materials 3.58 % Insurance 2.27 % Real estate 0.84 % respectively

KSA

Saudi Armco has a positive performance today by + 4.68 %, SABIC has a positive performance today by + 0.88 %, STC has a positive performance today by + 1.19 %, Al Rajhi Bank has a flat performance today

U.A.E

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



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