

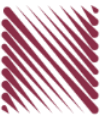


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, February 20th 2023

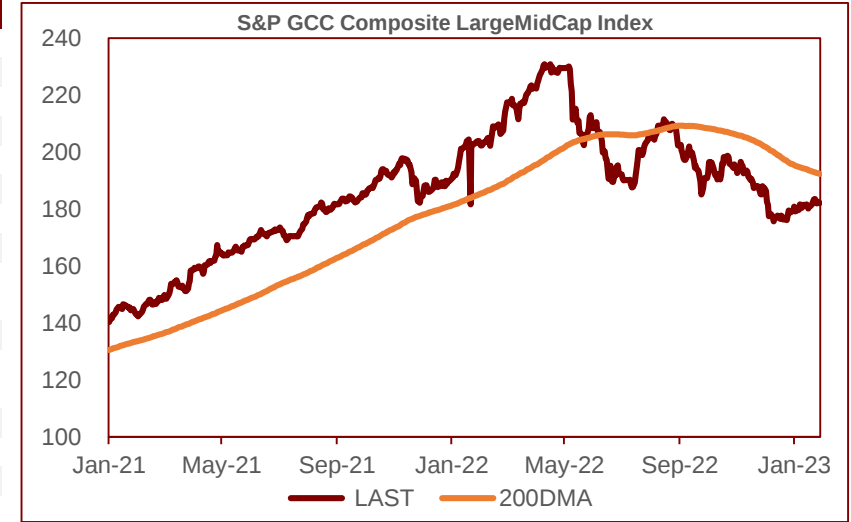




Market Watch

Monday, February 20, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	10,370.97	-1.68	-1.68	-3.91	-1.03	-1.03	9,947 SAR	1.67	14.74
Qatar (QE Index)	10,716.74	0.71	0.71	-1.97	0.33	0.33	538 QAR	1.37	12.03
Dubai (DFMGI)	3,462.13	-0.22	-0.22	4.81	3.78	3.78	497 AED	1.20	18.04
Abu Dhabi (ADI)	9,975.87	0.13	0.13	1.67	-2.30	-2.30	1,435 AED	1.92	22.88
Bahrain (BAX)	1,937.96	0.12	0.12	0.50	2.25	2.25	20 BHD	1.53	18.00
MUSCAT SE INDEX	4,664.17	0.23	0.23	-0.83	-3.98	-3.98	5 OMR	0.94	13.25
SP GCC Comp LMC	176.92	-0.94	-0.94	-2.48	-1.04	-1.04			
SP UAE PRICE INDEX	138.45	-0.08	-0.08	3.40	0.69	0.69			
Developed Markets									
MSCI World Index	2,783.26	-0.26	-0.26	-0.06	6.94	6.94			
U.S. (S&P 500)	4,079.09	-0.28	-0.28	0.06	6.24	6.24			
U.K. (FTSE 100)	8,014.31	0.02	0.02	3.12	7.55	7.55			
Japan (Topix)	1,999.71	-0.07	-0.07	1.24	5.71	5.71			
Emerging Markets									
MSCI EM Index	1,005.21	-0.59	-0.59	-2.55	5.11	5.11			
China (SSE Composite)	3,290.34	1.27	1.27	1.06	6.51	6.51			
India (Sensex)	60,691.54	-1.02	-1.02	1.92	-0.25	-0.25			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	7,357.68	-0.09	-0.09	1.10	0.90	0.90	47.62 KWD	1.78	28.47
Kuwait Premier Index	8,224.44	-0.10	-0.10	1.72	1.34	1.34	37.63 KWD	1.80	23.64
Kuwait Main Index	5,546.84	-0.07	-0.07	-1.36	-0.89	-0.89	10.00 KWD	1.66	46.75
NIC 50	9,159.05	0.00	-0.11	1.71	1.33	0.83	28.60 KWD	1.78	22.64
Kuwait Sector									
Banking	1,850.10	-0.01	-0.01	2.03	3.13	3.13	31.17 KWD	1.31	24.64
Telecom	1,143.25	-0.58	-0.58	-4.54	-3.23	-3.23	3.51 KWD	1.96	11.64
Industrials	990.87	-0.60	-0.60	1.12	-8.16	-8.16	3.48 KWD	0.78	18.18
Financial services	1,258.08	-0.34	-0.34	0.34	0.07	0.07	3.58 KWD	0.68	18.18
Real estate	1,169.22	0.17	0.17	-1.65	-3.27	-3.27	2.54 KWD	0.53	22.30
Basic materials	858.26	-0.06	-0.06	-0.56	-0.79	-0.79	0.77 KWD	1.28	8.31
Health care	447.32	0.00	0.00	0.82	-3.15	-3.15	0.22 KWD	2.34	12.75
Consumer services	483.04	2.40	2.40	0.72	0.64	0.64	0.74 KWD	0.94	11.22
Insurance	1,605.11	0.63	0.63	3.31	3.50	3.50	0.66 KWD	0.82	9.56
Consumer Disc	1,455.62	0.33	0.33	3.70	-2.10	-2.10	0.15 KWD	0.97	0.00
Energy	1,091.47	-0.39	-0.39	-0.64	-4.13	-4.13	0.23 KWD	0.58	4.74
Technology	720.22	0.00	0.00	3.56	3.45	3.45	0.01 KWD	0.88	0.00
Utilities	484.21	-0.54	-0.54	1.10	-2.13	-2.13	0.20 KWD	1.70	15.13



What Move the GCC markets

Oil Prices

Oil prices were little changed in early Asian trade on Monday, after settling down \$2 a barrel on Friday, as rising supplies in the United States and forecasts of more interest rate hikes cooled optimism over China's demand recovery. Brent crude slid 9 cents, or 0.1%, to \$82.91 a barrel.

Kuwait Market

The market closed down today by – 0.09% at 7,357.68 value traded 32.6 million KD, Premier market value traded reached 25.9 million KD down by – 0.10% at 8,224.44.

KSA Market

The market closed down today by – 1.68% at 10,370.97.



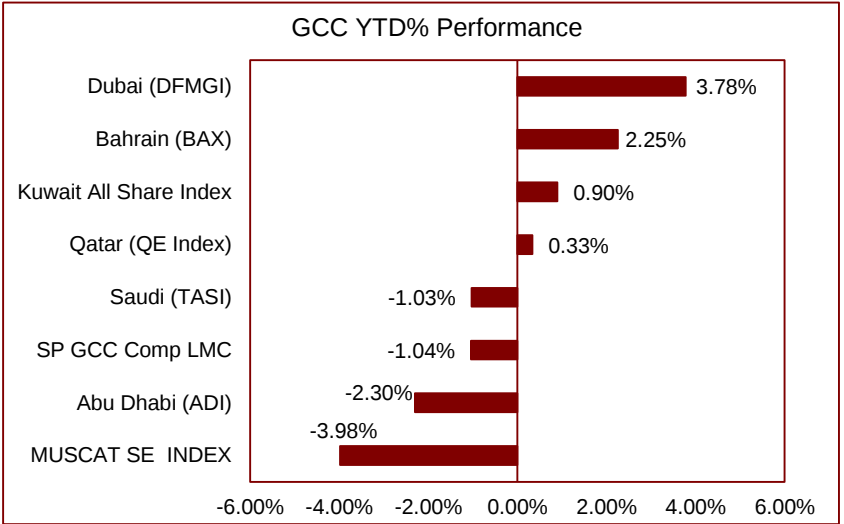
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.113	0.45	0.45	1.46	3.25	3.25	8.41 KWD	2.07	27.00
KFH	0.878	0.00	0.00	5.02	6.68	6.68	11.79 KWD	2.00	32.00
Zain	0.544	-0.73	-0.73	-1.81	-3.37	-3.37	2.35 KWD	1.96	11.64
BOUBYAN BANK	0.770	-1.03	-1.03	-1.79	-3.51	-3.51	2.88 KWD	3.03	34.00
Agility	0.601	-1.15	-1.15	1.69	-16.53	-16.53	1.61 KWD	1.11	39.28
Saudi Arabia									
ARAMCO	32.50	-1.66	-1.66	-1.37	1.25	1.25	7,150.00 SAR	5.15	12.53
SABIC	94.20	-1.46	-1.46	1.62	5.37	5.37	282.60 SAR	1.55	35.00
STC	35.35	-3.02	-3.02	-4.20	-3.42	-3.42	176.75 SAR	2.41	14.86
AL-RAJHI BANK	74.50	-2.23	-2.23	-9.15	-0.93	-0.93	298.00 SAR	2.97	19.36
NCB	48.00	-1.94	-1.94	1.48	-4.95	-4.95	214.94 SAR	1.28	11.89
United Arab Emirates									
ETISALAT.AD	26.72	-0.89	-0.89	3.97	16.89	16.89	206.60 AED	5.10	21.10
FAB.AD	14.14	1.00	1.00	3.97	-17.31	-17.31	156.20 AED	1.36	11.98
EMIRATES NBD	13.45	0.37	0.37	3.86	3.46	3.46	84.95 AED	0.91	6.79
DB ISLAMIC BK	5.77	0.87	0.87	3.96	1.23	1.23	41.78 AED	1.01	8.26
EMAAR PROPERT	5.72	0.70	0.70	2.88	-2.39	-2.39	50.56 AED	0.72	6.89
Qatar									
QNB	16.60	2.47	2.47	-7.78	-7.78	-7.78	152.57 QAR	1.46	11.55
INDUSTRIES QAT	13.91	-0.64	-0.64	-1.00	8.59	8.59	83.74 QAR	2.00	9.55
QA ISLAMIC BK	20.20	3.54	3.54	2.69	8.84	8.84	47.50 QAR	1.75	12.50
MASRAF AL RAYA	2.79	0.14	0.14	2.01	-12.17	-12.17	25.77 QAR	1.08	17.67
MESAIEED PETRO	2.13	3.09	3.09	-0.74	0.33	0.33	26.68 QAR	1.54	15.17
OMAN									
BANK MUSCAT	0.284	0.00	0.00	2.90	3.27	3.27	2.13 OMR	0.96	8.33
OMANTEL	0.952	7.21	2.15	0.42	3.48	3.48	0.71 OMR	1.21	7.69
BANK DHOFAR	0.150	0.00	0.00	0.00	-14.29	-14.29	0.45 QAR	0.63	14.93
NAT BANK OF OMAN	0.258	-1.53	-1.53	-5.84	-10.73	-10.73	0.42 QAR	0.65	12.71
OMINVEST	0.420	0.00	0.00	0.48	0.00	0.00	0.28 QAR	0.84	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
8-Feb 23	24.74%	16.79%	0.06%	1.35%	0.39%	4.46%	17.66%	15.22%	5.87%	5.19%
15-Feb 23	24.78%	16.71%	0.06%	1.35%	0.40%	4.42%	17.68%	15.25%	5.85%	5.16%

End of Report

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed and others authorized to receive it.

Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.09 %The leading sector bottom performance indices today are Industrials -0.6 % Telecom -0.58 % Utilities -0.54 % respectively

KSA

Saudi Armco have negative performance today by -1.66 %, SABIC have negative performance today by -1.46 %, STC have negative performance today by -3.02 %, Al Rajhi Bank have negative performance today by -2.23 %

U.A.E

ETISALAT .AD have negative performance today by -0.89 %, FAB.AD has a positive performance today by + 1 %



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw