

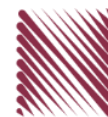


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, March 21st 2023

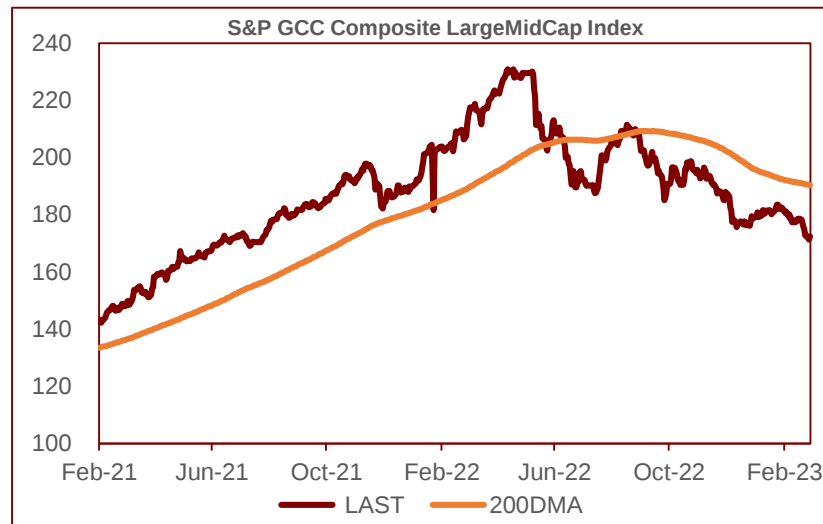




Market Watch

Tuesday, March 21st 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,359.74	1.39	3.84	2.54	-1.13	-1.13	9,750 SAR	1.68	16.48
Qatar (QE Index)	9,876.98	1.01	-0.33	-6.57	-7.53	-7.53	502 QAR	1.20	10.90
Dubai (DFMGI)	3,381.04	1.10	2.24	-1.65	1.35	1.35	488 AED	1.15	18.06
Abu Dhabi (ADI)	9,544.55	-0.01	1.09	-3.05	-6.53	-6.53	1,435 AED	1.72	15.82
Bahrain (BAX)	1,899.50	0.70	0.13	-1.67	0.22	0.22	19 BHD	1.72	18.00
MUSCAT SE INDEX	4,859.36	-0.01	-0.58	2.23	0.04	0.04	5 OMR	1.02	13.25
SP GCC Comp LMC	172.20	1.17	3.11	-0.13	-3.68	-3.68			
SP UAE PRICE INDEX	130.60	0.62	1.93	-4.14	-5.02	-5.02			
Developed Markets									
MSCI World Index	2,711.84	1.25	1.26	-0.10	4.19	4.19			
U.S. (S&P 500)	4,002.87	1.30	1.08	0.82	4.25	4.25			
U.K. (FTSE 100)	7,536.22	1.79	1.70	-4.32	1.13	1.13			
Japan (Topix)	1,929.30	0.00	-0.40	-3.21	1.99	1.99			
Emerging Markets									
MSCI EM Index	952.46	1.01	1.18	-1.20	-0.41	-0.41			
China (SSE Composite)	3,255.65	0.64	0.89	-0.73	5.39	5.39			
India (Sensex)	58,074.68	0.77	0.76	-1.51	-4.55	-4.55			
Kuwait									
Kuwait All Share Index	7,041.79	0.41	-0.06	-2.80	-3.43	-3.43	45.59 KWD	1.68	25.59
Kuwait Premier Index	7,827.03	0.41	-0.16	-3.01	-3.56	-3.56	35.78 KWD	1.67	22.17
Kuwait Main Index	5,446.32	0.41	0.40	-1.85	-2.69	-2.69	9.80 KWD	1.70	38.14
NIC 50	8,745.22	0.42	-0.17	-3.02	-3.57	-3.73	28.60 KWD	1.65	21.17
Kuwait Sector									
Banking	1,753.47	0.18	-0.35	-3.12	-2.25	-2.25	29.54 KWD	1.25	23.17
Telecom	1,152.89	0.17	-0.61	-1.58	-2.42	-2.42	3.54 KWD	1.93	11.49
Industrials	983.85	1.90	2.12	-0.66	-8.81	-8.81	3.46 KWD	0.76	13.97
Financial services	1,178.73	1.04	0.51	-4.64	-6.24	-6.24	3.39 KWD	0.67	18.79
Real estate	1,098.74	0.88	0.28	-3.79	-9.10	-9.10	2.39 KWD	0.52	16.25
Basic materials	824.50	-0.85	-1.08	-2.32	-4.69	-4.69	0.75 KWD	1.33	7.61
Health care	455.49	0.00	-1.47	-0.99	-1.38	-1.38	0.23 KWD	2.48	12.74
Consumer services	457.99	-0.45	-1.47	-4.30	-4.58	-4.58	0.73 KWD	0.87	11.25
Insurance	1,679.95	2.40	3.15	3.22	8.33	8.33	0.69 KWD	0.81	10.16
Consumer Disc	1,458.04	-0.54	-0.45	0.11	-1.94	-1.94	0.14 KWD	0.96	0.00
Energy	1,013.07	-0.62	0.86	-0.47	-11.02	-11.02	0.21 KWD	0.56	4.28
Technology	669.30	0.00	-0.43	-1.18	-3.87	-3.87	0.01 KWD	0.83	0.00
Utilities	463.16	0.00	-1.67	-3.30	-6.38	-6.38	0.19 KWD	1.66	13.38



What Move the GCC markets

Oil Prices

Oil rose on Tuesday, extending a recovery from a 15-month low hit the previous day, as the rescue of Credit Suisse eased worries about global banking sector risks that could hit economic growth and fuel demand, Brent crude was up 52 cents, or 0.7%, at \$74.31 per barrel

Kuwait Market

The market closed up today by + 0.41% at 7,041.79 value traded 42.3 million KD, Premier market value traded reached 38.5 million KD up by + 0.41% at 7,827.03.

KSA Market

The market closed up today by + 1.39% at 10,359.74.



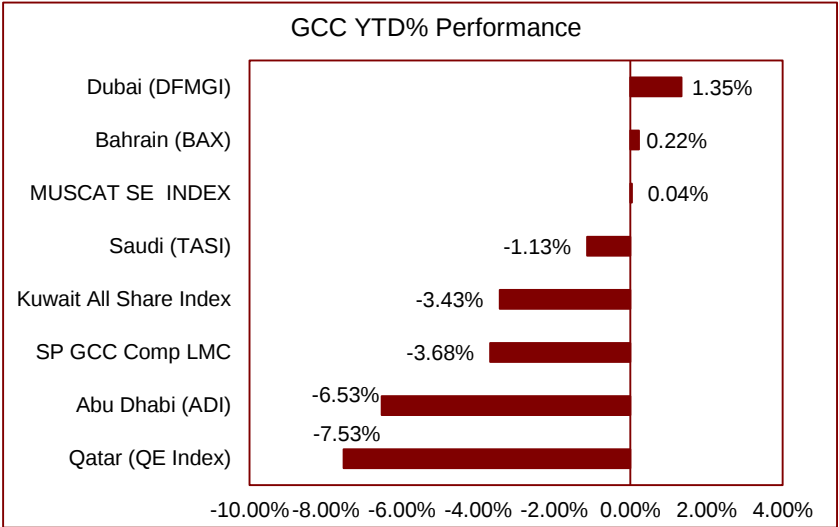
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.058	-0.56	-0.75	-1.12	-1.86	-1.86	7.99 KWD	1.97	27.00
KFH	0.828	0.98	0.36	-3.38	0.61	0.61	11.12 KWD	1.88	32.00
Zain	0.537	0.00	-1.10	-3.94	-4.62	-4.62	2.32 KWD	1.93	11.49
BOUBYAN BANK	0.669	-0.89	-3.88	-12.55	-16.17	-16.17	2.50 KWD	2.64	34.00
Agility	0.622	3.84	5.42	3.15	-13.61	-13.61	1.67 KWD	1.15	40.65
Saudi Arabia									
ARAMCO	31.55	1.45	1.94	-0.79	-1.71	-1.71	6,942.48 SAR	4.79	11.70
SABIC	89.50	2.76	4.68	1.13	0.11	0.11	268.56 SAR	1.44	35.00
STC	38.40	2.40	2.54	9.25	4.92	4.92	192.04 SAR	2.60	15.38
AL-RAJHI BANK	74.10	0.27	4.96	5.41	-1.46	-1.46	296.46 SAR	2.96	18.95
NCB	45.90	3.38	10.60	-2.86	-9.11	-9.11	205.58 SAR	1.23	10.84
United Arab Emirates									
ETISALAT.AD	23.72	1.37	2.24	-6.98	3.76	3.76	206.60 AED	5.10	21.10
FAB.AD	13.48	-1.03	3.85	-4.26	-21.17	-21.17	148.92 AED	1.29	11.42
EMIRATES NBD	12.80	0.79	0.00	-5.88	-1.54	-1.54	80.85 AED	0.87	6.47
DB ISLAMIC BK	5.53	0.18	0.73	-3.66	-2.98	-2.98	40.04 AED	0.97	7.91
EMAAR PROPERT	5.55	3.93	6.73	-0.89	-5.29	-5.29	49.06 AED	0.71	6.67
Qatar									
QNB	15.76	2.87	-0.06	-6.47	-12.44	-12.44	145.78 QAR	1.39	10.97
INDUSTRIES QAT	12.20	-1.45	-4.01	-12.36	-4.76	-4.76	73.92 QAR	1.76	8.37
QA ISLAMIC BK	17.49	0.69	-0.68	-5.97	-5.77	-5.77	41.39 QAR	1.52	10.83
MASRAF AL RAYA	2.63	1.04	5.08	-2.70	-17.16	-17.16	24.47 QAR	1.01	16.67
MESAIEED PETRO	1.96	0.87	1.08	-6.66	-7.80	-7.80	24.67 QAR	1.42	13.94
OMAN									
BANK MUSCAT	0.289	0.35	1.40	-1.03	5.09	5.09	2.17 OMR	0.97	8.33
OMANTEL	1.050	18.24	0.00	9.38	14.13	14.13	0.79 OMR	1.24	7.69
BANK DHOFAR	0.155	0.00	0.00	1.97	-11.43	-11.43	0.46 QAR	0.65	14.93
NAT BANK OF OMAN	0.265	0.00	-3.64	-0.38	-8.30	-8.30	0.43 QAR	0.67	12.71
OMINVEST	0.498	-0.40	-2.35	9.21	18.57	18.57	0.33 QAR	0.93	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
8-March 23	24.78%	16.61%	0.06%	1.36%	0.42%	4.69%	17.70%	15.06%	5.84%	5.25%
15-March 23	24.85%	16.58%	0.06%	1.36%	0.41%	4.72%	17.70%	15.03%	5.84%	5.25%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.41 %The leading sector best performance indices today are Insurance 2.4 % Industrials 1.9 % Financial services 1.04 % respectively

KSA

Saudi Armco has a positive performance today by + 1.45 %, SABIC have positive performance today by + 2.76 %, STC has a positive performance today by + 2.4 %, Al Rajhi Bank has a positive performance today by + 0.27 %

U.A.E

ETISALAT .AD has a positive performance today by + 1.37 %, FAB.AD has a negative performance today by -1.03 %



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