



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, February 21th 2023

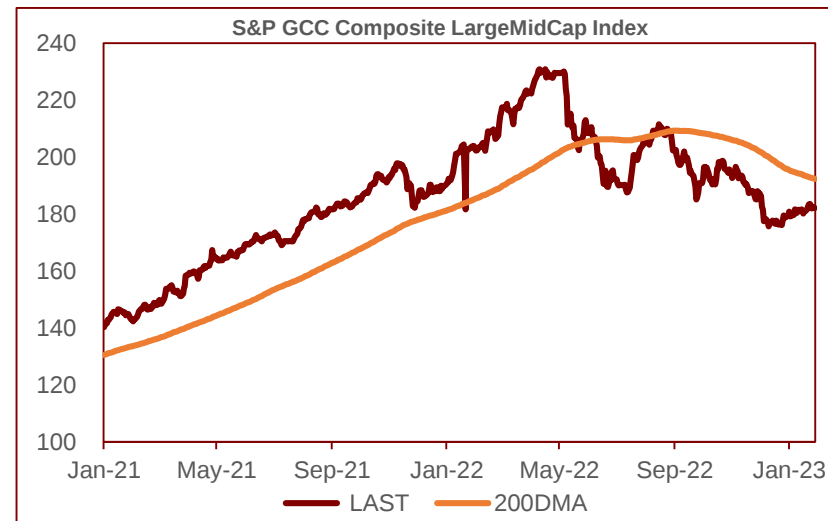




Market Watch

Tuesday, February 21, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,269.73	-0.98	-2.64	-4.85	-1.99	-1.99	9,893 SAR	1.65	14.74
Qatar (QE Index)	10,694.23	-0.21	0.50	-2.18	0.12	0.12	540 QAR	1.34	11.99
Dubai (DFMGI)	3,458.00	-0.12	-0.33	4.68	3.65	3.65	496 AED	1.21	18.49
Abu Dhabi (ADI)	9,948.84	-0.27	-0.14	1.40	-2.57	-2.57	1,435 AED	1.91	22.90
Bahrain (BAX)	1,935.88	-0.11	0.01	0.40	2.14	2.14	20 BHD	1.53	18.00
MUSCAT SE INDEX	4,632.75	-0.67	-0.44	-1.50	-4.63	-4.63	5 OMR	0.93	13.25
SP GCC Comp LMC	175.53	-0.79	-1.72	-3.24	-1.82	-1.82			
SP UAE PRICE INDEX	137.77	-0.49	-0.57	2.90	0.20	0.20			
Developed Markets									
MSCI World Index	2,740.38	-1.54	-1.80	-1.60	5.29	5.29			
U.S. (S&P 500)	3,997.34	-2.00	-2.28	-1.94	4.11	4.11			
U.K. (FTSE 100)	7,977.75	-0.46	-0.43	2.65	7.06	7.06			
Japan (Topix)	1,997.46	-0.11	-0.18	1.12	5.59	5.59			
Emerging Markets									
MSCI EM Index	995.19	-1.00	-1.58	-3.52	4.06	4.06			
China (SSE Composite)	3,306.52	0.49	1.77	1.56	7.03	7.03			
India (Sensex)	60,672.72	-0.03	-1.05	1.89	-0.28	-0.28			
Kuwait									
Kuwait All Share Index	7,350.27	-0.10	-0.19	1.00	0.80	0.80	47.57 KWD	1.78	28.22
Kuwait Premier Index	8,223.61	-0.01	-0.11	1.71	1.33	1.33	37.64 KWD	1.80	23.57
Kuwait Main Index	5,518.10	-0.52	-0.59	-1.87	-1.41	-1.41	9.93 KWD	1.66	45.90
NIC 50	9,181.89	0.25	-0.12	1.70	1.32	1.08	28.60 KWD	1.78	22.57
Kuwait Sector									
Banking	1,847.27	-0.15	-0.16	1.87	2.97	2.97	31.12 KWD	1.32	24.57
Telecom	1,163.13	1.74	1.15	-2.88	-1.55	-1.55	3.57 KWD	2.01	11.96
Industrials	981.99	-0.90	-1.50	0.22	-8.98	-8.98	3.45 KWD	0.78	18.12
Financial services	1,250.79	-0.58	-0.91	-0.24	-0.51	-0.51	3.55 KWD	0.68	17.48
Real estate	1,160.49	-0.75	-0.58	-2.38	-3.99	-3.99	2.52 KWD	0.53	22.23
Basic materials	860.15	0.22	0.16	-0.34	-0.57	-0.57	0.77 KWD	1.28	8.33
Health care	461.85	3.25	3.25	4.09	0.00	0.00	0.23 KWD	2.46	13.41
Consumer services	485.40	0.49	2.90	1.21	1.14	1.14	0.74 KWD	0.94	11.43
Insurance	1,601.68	-0.21	0.41	3.09	3.28	3.28	0.66 KWD	0.82	9.56
Consumer Disc	1,462.54	0.48	0.80	4.19	-1.63	-1.63	0.15 KWD	0.96	0.00
Energy	1,077.41	-1.29	-1.67	-1.92	-5.37	-5.37	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	486.84	0.54	0.00	1.65	-1.60	-1.60	0.20 KWD	1.71	15.21



What Move the GCC markets

Oil Prices

Brent oil fell on Tuesday as concern about a global economic slowdown that would reduce demand prompted investors to take profits on the previous day's gains, outweighing supply curbs. Global benchmark Brent crude was down 12 cents, or 0.1%, at \$83.95 a barrel..

Kuwait Market

The market closed down today by – 0.10% at 7,350.27 value traded 30.8 million KD, Premier market value traded reached 35.3 million KD down by – 0.01% at 8,223.61.

KSA Market

The market closed down today by – 0.98% at 10,269.73.



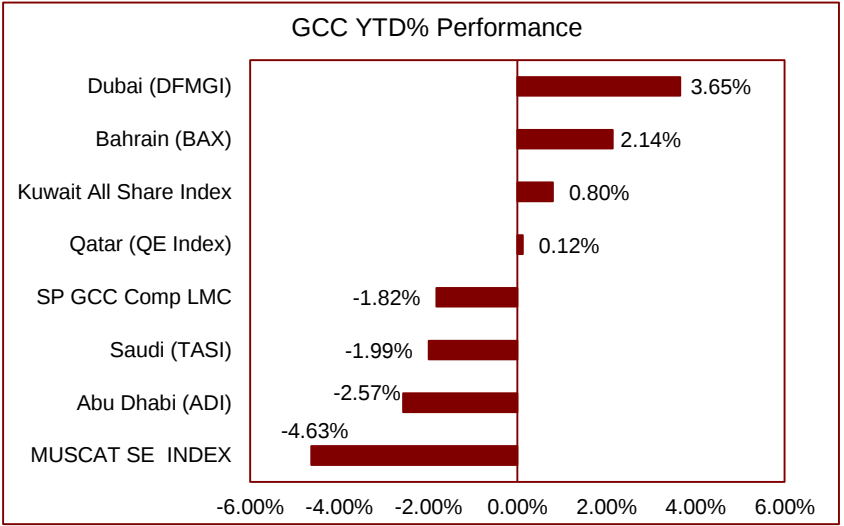
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.112	-0.09	0.36	1.37	3.15	3.15	8.40 KWD	2.07	27.00
KFH	0.878	0.00	0.00	5.02	6.68	6.68	11.79 KWD	2.00	32.00
Zain	0.559	2.76	2.01	0.90	-0.71	-0.71	2.42 KWD	2.01	11.96
BOUBYAN BANK	0.768	-0.26	-1.29	-2.04	-3.76	-3.76	2.87 KWD	3.03	34.00
Agility	0.590	-1.83	-2.96	-0.17	-18.06	-18.06	1.58 KWD	1.09	38.56
Saudi Arabia									
ARAMCO	32.40	-0.31	-1.97	-1.67	0.93	0.93	7,128.19 SAR	5.13	12.53
SABIC	92.70	-1.59	-3.03	0.00	3.69	3.69	278.11 SAR	1.52	35.00
STC	35.00	-0.99	-3.98	-5.15	-4.37	-4.37	175.00 SAR	2.38	14.86
AL-RAJHI BANK	74.20	-0.40	-2.62	-9.51	-1.33	-1.33	296.81 SAR	2.96	19.36
NCB	47.60	-0.83	-2.76	0.63	-5.74	-5.74	213.16 SAR	1.27	11.89
United Arab Emirates									
ETISALAT.AD	26.40	-1.20	-2.08	2.72	15.49	15.49	206.60 AED	5.10	21.10
FAB.AD	14.04	-0.71	0.29	3.24	-17.89	-17.89	155.11 AED	1.35	11.89
EMIRATES NBD	13.50	0.37	0.75	4.25	3.85	3.85	85.27 AED	0.91	6.82
DB ISLAMIC BK	5.73	-0.69	0.17	3.24	0.53	0.53	41.49 AED	1.00	8.20
EMAAR PROPERT	5.63	-1.57	-0.88	1.26	-3.92	-3.92	49.76 AED	0.71	6.78
Qatar									
QNB	16.74	0.84	3.33	-7.00	-7.00	-7.00	154.62 QAR	1.47	11.65
INDUSTRIES QAT	13.82	-0.65	-1.29	-1.64	7.88	7.88	83.61 QAR	1.99	9.49
QA ISLAMIC BK	19.90	-1.49	2.00	1.17	7.22	7.22	47.02 QAR	1.73	12.32
MASRAF AL RAYA	2.76	-1.08	-0.93	0.92	-13.12	-13.12	25.62 QAR	1.06	17.48
MESAIEED PETRO	2.11	-0.94	2.13	-1.67	-0.61	-0.61	26.56 QAR	1.53	15.02
OMAN									
BANK MUSCAT	0.286	0.70	0.70	3.62	4.00	4.00	2.15 OMR	0.96	8.33
OMANTEL	0.932	4.95	0.00	-1.69	1.30	1.30	0.70 OMR	1.18	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	0.260	0.78	-0.76	-5.11	-10.03	-10.03	0.42 QAR	0.66	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

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.1 %The leading sector bottom performance indices today are Energy -1.29 % Industrials -0.9 % Real estate -0.75 % respectively

KSA

Saudi Armco has a negative performance today by -0.31 %, SABIC has a negative performance today by -1.59 %, STC has a negative performance today by -0.99 %, Al Rajhi Bank has a negative performance today by -0.4 %

U.A.E

ETISALAT .AD has a negative performance today by -1.2 %, FAB.AD has a negative performance today by -0.71 %



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