

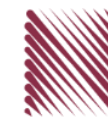


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, May 22nd 2023



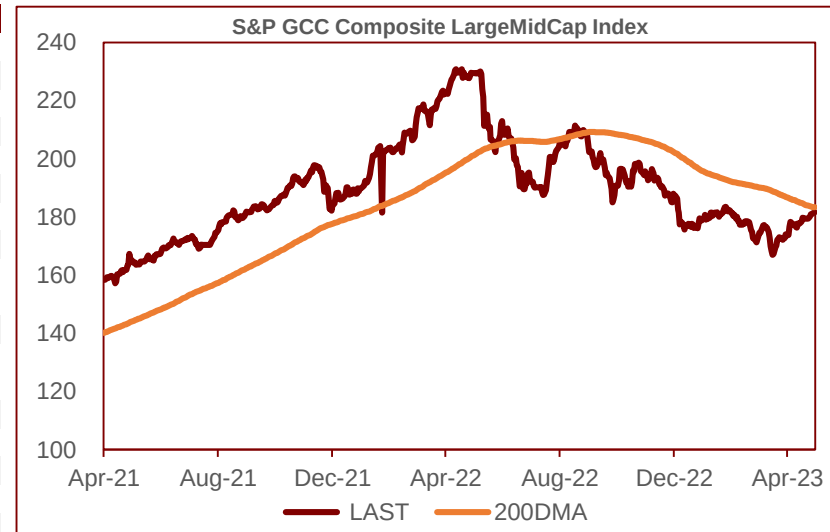


Market Watch

Monday, May 22, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,329.19	-0.11	3.32	0.19	6.98	8.12	10,900 SAR	1.94	18.05
Qatar (QE Index)	10,637.41	-0.13	5.43	4.48	4.16	-0.41	569 QAR	1.39	11.37
Dubai (DFMGI)	3,549.30	0.13	1.77	0.13	4.19	6.39	508 AED	1.27	13.90
Abu Dhabi (ADI)	9,527.42	0.51	-0.32	-2.67	1.03	-6.70	1,435 AED	1.80	20.80
Bahrain (BAX)	1,949.71	0.10	3.62	2.38	3.34	2.87	20 BHD	1.63	17.65
MUSCAT SE INDEX	4,703.13	-0.23	-2.25	-0.32	-3.29	-3.18	5 OMR	1.00	13.25
SP GCC Comp LMC	179.63	-0.10	1.09	-1.10	3.43	0.48			
SP UAE PRICE INDEX	132.26	0.63	-0.12	-3.80	3.35	-3.81			
Developed Markets									
MSCI World Index	2,845.71	0.10	0.58	0.34	1.94	9.34			
U.S. (S&P 500)	4,192.63	0.02	1.12	0.56	2.03	9.20			
U.K. (FTSE 100)	7,770.99	0.18	-0.92	-1.27	1.82	4.28			
Japan (Topix)	2,175.90	0.66	8.37	5.76	8.60	15.02			
Emerging Markets									
MSCI EM Index	983.27	0.62	-1.38	0.64	-0.71	2.81			
China (SSE Composite)	3,296.47	0.39	-0.66	-0.81	0.72	6.71			
India (Sensex)	61,963.68	0.38	2.54	1.39	5.04	1.85			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,765.57	-0.79	-3.21	-5.28	-4.04	-7.22	44.14 KWD	1.65	19.13
Kuwait Premier Index	7,463.55	-0.92	-3.80	-5.67	-4.58	-8.04	34.38 KWD	1.60	19.20
Kuwait Main Index	5,408.77	-0.21	-0.57	-3.53	-1.67	-3.36	9.76 KWD	1.80	18.88
NIC 50	8,864.77	0.00	-3.81	-5.68	-4.59	-2.41	28.60 KWD	1.58	18.20
Kuwait Sector									
Banking	1,652.94	-1.03	-4.19	-5.88	-5.70	-7.86	28.14 KWD	1.22	20.20
Telecom	1,076.71	-0.84	-5.22	-8.34	-4.91	-8.87	3.33 KWD	1.32	8.56
Industrials	967.50	-0.77	-1.03	-3.78	-1.97	-10.32	3.43 KWD	0.79	19.88
Financial services	1,160.69	-0.48	-4.19	-5.67	-2.95	-7.68	3.37 KWD	0.69	19.74
Real estate	1,105.31	0.69	-1.12	-3.41	2.33	-8.55	2.38 KWD	0.52	19.79
Basic materials	879.09	0.29	5.01	-1.45	2.56	1.62	0.78 KWD	1.29	4.46
Health care	458.82	0.00	-0.78	0.40	0.73	-0.66	0.23 KWD	0.98	6.83
Consumer services	514.42	-2.53	14.64	12.58	15.53	7.18	0.73 KWD	0.81	13.21
Insurance	2,139.02	0.05	12.80	1.20	11.99	37.93	0.88 KWD	0.78	8.71
Consumer Disc	1,482.29	0.49	3.75	1.72	1.39	-0.31	0.16 KWD	0.98	0.00
Energy	978.66	-1.26	-1.96	-0.02	-1.93	-14.04	0.21 KWD	0.54	4.37
Technology	581.27	0.00	-6.77	-0.13	-8.58	-16.51	0.01 KWD	0.72	0.00
Utilities	478.95	-1.09	3.41	4.00	2.83	-3.19	0.20 KWD	1.85	15.07



What Move the GCC markets

Oil Prices

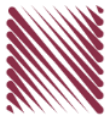
Oil prices slipped on Monday as caution around the U.S. debt ceiling talks and concerns about demand recovery in China offset support from lower supplies from Canada and OPEC+ producers. Brent crude futures fell 48 cents, or 0.6%, to \$75.10 a barrel.

Kuwait Market

The market closed down today by - 0.79% at 6,765.57 value traded 57.7 million KD, Premier market value traded reached 48.9 million KD down by - 0.92% at 7,463.55.

KSA Market

The market closed down today by - 0.11% at 11,329.19

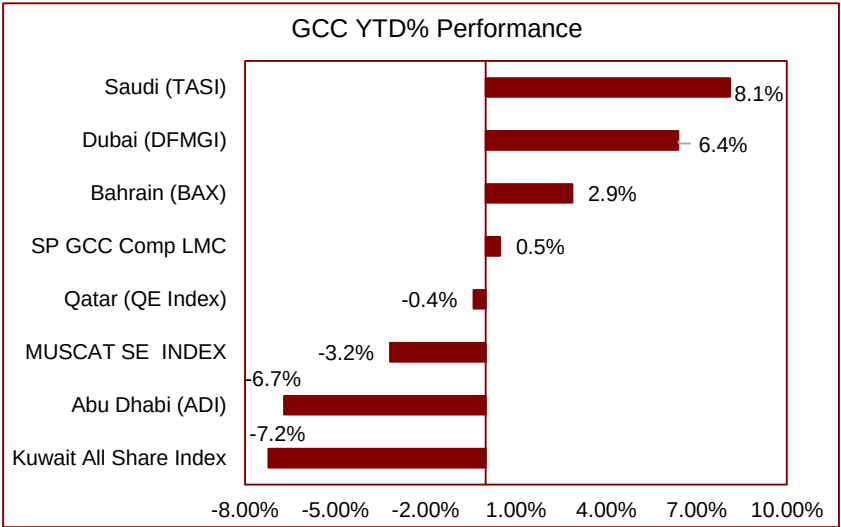


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.926	-0.43	-3.84	-7.77	-7.93	-9.81	7.37 KWD	1.87	27.00
KFH	0.705	-2.35	-4.73	-4.86	-6.11	-5.77	10.66 KWD	1.84	32.00
Zain	0.512	-0.78	-6.91	-9.06	-5.19	-9.06	2.23 KWD	1.74	11.00
BOUBYAN BANK	0.596	1.02	-5.40	-9.83	-1.75	-20.83	2.34 KWD	2.63	34.00
Agility	0.617	-0.48	3.18	0.16	-0.64	-14.31	1.66 KWD	0.87	22.35
Saudi Arabia									
ARAMCO	32.25	-0.46	7.99	-2.27	9.83	10.51	7,840.80 SAR	5.25	13.95
SABIC	90.10	-0.99	-1.21	-3.01	-0.22	0.78	273.00 SAR	1.46	35.00
STC	44.60	0.79	4.94	0.45	11.36	21.86	221.25 SAR	2.95	18.05
AL-RAJHI BANK	74.50	-0.27	-1.46	-3.12	1.36	-0.93	298.80 SAR	3.01	17.46
NCB	37.90	0.13	2.07	2.80	10.76	0.56	227.10 SAR	1.32	12.26
United Arab Emirates									
ETISALAT.AD	22.84	3.72	-2.56	-4.83	3.54	-0.09	206.60 AED	5.10	21.10
FAB.AD	13.38	-1.76	1.67	-5.64	3.88	-21.75	150.47 AED	1.34	12.83
EMIRATES NBD	13.85	0.00	6.54	-1.77	5.32	6.54	87.49 AED	0.91	5.23
DB ISLAMIC BK	5.33	-0.56	0.38	-4.14	1.91	-6.49	38.81 AED	0.96	7.45
EMAAR PROPERT	5.95	0.00	-0.34	0.34	6.25	1.54	52.59 AED	0.74	6.27
Qatar									
QNB	16.91	-0.41	9.10	10.52	5.23	-6.06	156.83 QAR	1.54	11.21
INDUSTRIES QAT	13.00	-0.54	-0.31	0.39	0.00	1.48	79.07 QAR	2.16	10.87
QA ISLAMIC BK	18.35	-0.81	3.26	2.57	3.21	-1.13	43.71 QAR	1.64	11.30
MASRAF AL RAYA	2.72	-0.11	0.93	3.90	-7.99	-14.25	25.31 QAR	1.07	20.70
MESAIEED PETRO	2.07	-1.20	4.98	5.04	7.55	-2.91	26.26 QAR	1.61	16.48
OMAN									
BANK MUSCAT	0.268	0.37	-2.55	-1.83	-2.55	-2.55	2.01 OMR	0.93	8.33
OMANTEL	0.980	10.36	-3.45	-2.00	-10.91	6.52	0.74 OMR	1.22	7.69
BANK DHOFAR	0.176	0.00	10.00	13.55	10.00	0.57	0.53 QAR	0.74	14.93
NAT BANK OF OMAN	0.288	0.35	1.41	4.73	7.46	-0.35	0.47 QAR	0.72	12.71
OMINVEST	0.382	0.00	-8.17	-5.91	-22.98	-9.05	0.26 QAR	0.71	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
10-May 23	24.78%	16.01%	0.06%	1.35%	0.44%	4.61%	17.66%	14.12%	6.06%	4.98%
17-May 23	24.73%	15.98%	0.06%	1.35%	0.23%	4.62%	17.67%	14.04%	6.07%	4.96%

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 -0.79 %The leading sector bottom performance indices today are Consumer services -2.53 % Energy -1.26 % Utilities -1.09 % respectively

KSA
Saudi Armco has a negative performance today by -0.46 %, SABIC has a negative performance today by -0.98 %, STC has a positive performance today by + 0.79 %, Al Rajhi Bank has a negative performance today by -0.27 %

U.A.E
ETISALAT .AD has a positive performance today by + 3.72 %, FAB.AD have negative performance today by -1.76 %



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