



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, June 22th 2023



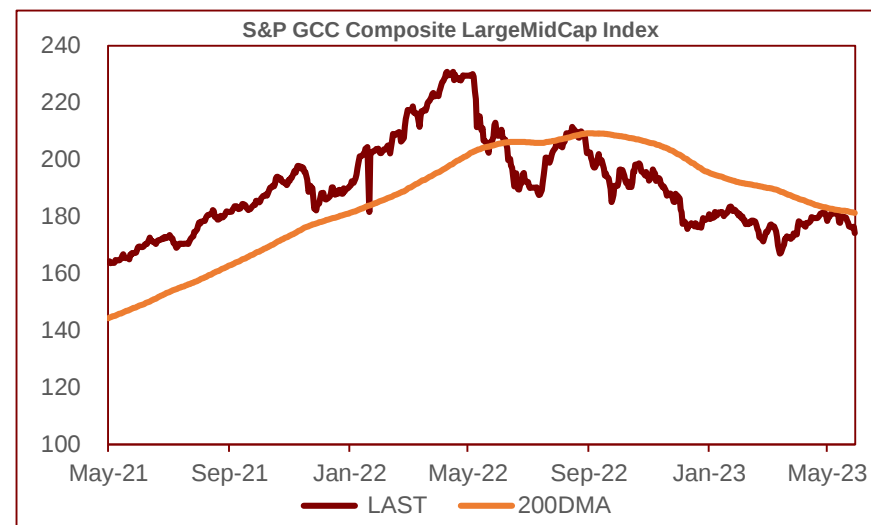


Market Watch

Thursday, June 22, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,458.98	-0.06	0.54	4.04	8.20	9.36	10,903 SAR	2.10	18.25
Qatar (QE Index)	10,106.13	-1.34	-1.47	-0.48	-1.04	-5.38	536 QAR	1.39	11.58
Dubai (DFMGI)	3,792.51	-0.15	2.41	5.59	10.85	13.20	542 AED	1.46	19.82
Abu Dhabi (ADI)	9,556.90	0.40	1.89	1.29	1.04	-6.69	1,435 AED	1.81	20.86
Bahrain (BAX)	1,961.43	0.22	0.36	-0.11	3.97	3.49	20 BHD	7.29	18.00
MUSCAT SE INDEX	4,731.12	0.20	1.55	2.26	-2.71	-2.60	5 OMR	1.00	13.25
SP GCC Comp LMC	179.29	-0.25	0.48	2.79	3.12	0.17			
SP UAE PRICE INDEX	134.82	-0.36	2.30	2.38	4.73	-2.53			
Developed Markets									
MSCI World Index	2,902.34	0.09	1.67	4.64	4.98	12.59			
U.S. (S&P 500)	4,348.33	0.37	2.05	4.83	6.63	14.13			
U.K. (FTSE 100)	7,461.87	-0.76	-1.29	0.75	-1.70	0.67			
Japan (Topix)	2,264.73	0.06	4.79	7.79	14.62	21.40			
Emerging Markets									
MSCI EM Index	991.91	-0.31	0.71	4.45	1.10	4.68			
China (SSE Composite)	3,197.90	0.00	-0.49	-0.21	-2.29	3.52			
India (Sensex)	62,979.37	-0.45	0.62	0.98	7.20	3.94			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,049.33	0.05	2.78	3.72	-0.02	-3.33	45.54 KWD	1.70	18.25
Kuwait Premier Index	7,835.38	0.03	3.03	4.55	0.17	-3.45	35.62 KWD	1.67	18.09
Kuwait Main Index	5,466.60	0.12	1.77	0.47	-0.62	-2.33	9.92 KWD	1.82	18.83
NIC 50	8,924.74	0.22	3.02	4.54	0.16	-1.75	28.60 KWD	1.65	17.09
Kuwait Sector									
Banking	1,711.95	0.00	2.22	3.72	-2.33	-4.57	28.81 KWD	1.21	19.09
Telecom	1,109.85	-0.02	1.83	1.23	-1.98	-6.06	3.41 KWD	1.36	8.85
Industrials	1,011.06	0.33	3.99	4.51	2.44	-6.29	3.56 KWD	0.83	21.26
Financial services	1,231.70	-0.04	4.30	4.01	2.99	-2.03	3.54 KWD	0.74	20.44
Real estate	1,206.24	0.16	7.24	8.19	11.67	-0.20	2.61 KWD	0.59	22.26
Basic materials	914.55	0.22	-2.06	-0.45	6.70	5.71	0.80 KWD	1.45	8.12
Health care	451.26	-1.58	0.68	-1.65	-0.93	-2.29	0.22 KWD	0.93	6.48
Consumer services	606.53	0.74	15.55	20.55	36.21	26.37	0.77 KWD	0.87	14.27
Insurance	2,122.75	-0.05	0.67	-0.63	11.14	36.88	0.87 KWD	0.79	10.80
Consumer Disc	1,562.37	-0.29	1.05	1.46	6.87	5.08	0.18 KWD	1.10	0.00
Energy	1,026.40	5.74	2.42	3.68	2.86	-9.85	0.21 KWD	0.78	4.53
Technology	632.92	-3.23	1.16	-8.33	-0.46	-9.09	0.01 KWD	0.78	0.00
Utilities	523.68	0.50	9.94	8.15	12.43	5.85	0.22 KWD	2.00	16.30



What Move the GCC markets

Oil Prices

Oil prices fell on Friday, headed for a weekly decline as traders worried interest rate hikes could sap demand despite signs of tighter supplies including lower U.S. crude stocks. In a second straight day of losses, Brent crude settled down 0.39%, or 29 cents, at \$73.85 barrel.

Kuwait Market

The market closed up today by + 0.05% at 7,049.33 value traded 36.4 million KD, Premier market value traded reached 27.9 million KD up + 0.03% at 7,835.38.

KSA Market

The market closed down today by – 0.06% at 11,458.98.

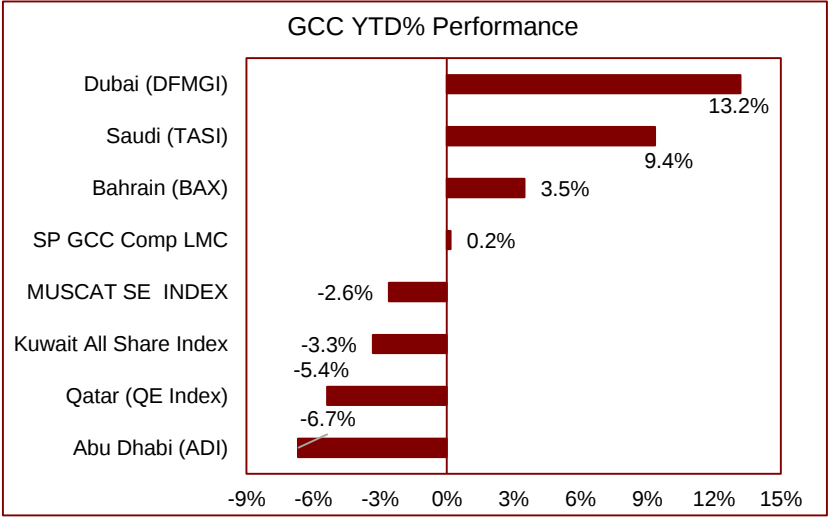


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.941	-0.32	0.97	2.28	-6.43	-8.34	7.46 KWD	1.89	27.00
KFH	0.749	0.27	3.17	5.94	-0.25	0.11	11.06 KWD	1.91	32.00
Zain	0.518	-0.38	1.37	-0.38	-4.07	-7.99	2.24 KWD	1.75	11.04
BOUBYAN BANK	0.638	-0.31	3.40	6.33	5.18	-15.25	2.53 KWD	2.85	34.00
Agility	0.628	-0.16	2.61	2.78	1.13	-12.78	1.68 KWD	0.88	22.64
Saudi Arabia									
ARAMCO	32.25	0.16	-0.62	2.38	9.83	10.51	7,803.46 SAR	5.23	13.84
SABIC	88.20	-0.11	-0.90	0.00	-2.33	-1.34	264.56 SAR	1.42	35.00
STC	43.50	-0.80	0.46	0.58	8.61	18.85	217.47 SAR	2.90	17.80
AL-RAJHI BANK	73.00	0.14	-0.54	3.25	-0.68	-2.93	291.96 SAR	2.94	16.97
NCB	36.80	0.27	-2.65	-0.27	7.54	-2.36	220.77 SAR	1.28	11.83
United Arab Emirates									
ETISALAT.AD	22.26	-0.54	-0.71	-3.55	0.91	-2.62	206.60 AED	5.10	21.10
FAB.AD	13.56	-1.45	5.61	6.77	5.28	-20.70	151.35 AED	1.35	12.77
EMIRATES NBD	14.80	-0.67	5.71	8.42	12.55	13.85	94.12 AED	0.98	5.59
DB ISLAMIC BK	5.45	0.74	2.44	3.61	4.21	-4.39	39.61 AED	0.98	7.58
EMAAR PROPERT	6.54	0.15	7.57	6.34	16.79	11.60	58.25 AED	0.82	6.89
Qatar									
QNB	15.60	-2.50	-3.11	-2.56	-2.92	-13.33	144.14 QAR	1.42	10.30
INDUSTRIES QAT	11.26	-0.44	-4.25	-6.01	-13.38	-12.10	68.15 QAR	1.87	9.36
QA ISLAMIC BK	17.46	-1.36	-2.18	-0.34	-1.80	-5.93	41.27 QAR	1.55	10.67
MASRAF AL RAYA	2.55	-1.28	-2.26	0.12	-13.60	-19.49	23.75 QAR	1.01	19.41
MESAIEED PETRO	1.93	-2.03	-4.03	-2.03	0.47	-9.31	24.24 QAR	1.49	15.21
OMAN									
BANK MUSCAT	0.275	0.36	3.00	4.96	0.00	0.00	2.06 OMR	0.95	8.33
OMANTEL	0.980	10.36	0.82	1.66	-10.91	6.52	0.74 OMR	1.21	7.69
BANK DHOFAR	0.173	-0.57	0.00	-1.14	8.12	-1.14	0.52 QAR	0.73	14.93
NAT BANK OF OMAN	0.280	0.72	2.56	2.56	4.48	-3.11	0.46 QAR	0.71	12.71
OMINVEST	0.374	1.08	2.19	1.08	-24.60	-10.95	0.25 QAR	0.70	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
14-June 23	24.3%	15.4%	0.06%	1.39%	0.23%	4.89%	17.66%	13.88%	6.14%	4.69%
21-June 23	24.29%	15.53%	0.06%	1.46%	0.24%	4.86%	17.64%	13.89%	6.19%	4.55%

End of Report
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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is up today by + 0.05 %The leading sector best performance indices today are Energy 5.74 % Consumer services 0.74 % Utilities 0.5 % respectively

KSA
Saudi Armco has a positive performance today by + 0.16 %, SABIC have negative performance today by -0.11%. STC have negative performance today by -0.8 %, Al Rajhi Bank has a positive performance today by + 0.14 %

U.A.E
ETISALAT .AD have negative performance today by -0.54 %, FAB.AD have negative performance today by -1.45 %



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