



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, February 23rd 2023





Market Watch

Thursday, February 23, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	9,994.79	-1.13	-3.75	-5.93	-3.10	-3.10	9,530 SAR	1.63	14.17
Qatar (QE Index)	10,538.30	-1.81	-1.59	-4.21	-1.96	-1.96	532 QAR	1.34	11.47
Dubai (DFMGI)	3,423.90	-0.43	-1.66	3.29	2.27	2.27	492 AED	1.19	19.02
Abu Dhabi (ADI)	9,850.95	-0.44	-1.19	0.34	-3.59	-3.59	1,435 AED	1.90	22.86
Bahrain (BAX)	1,936.02	0.16	0.18	0.57	2.32	2.32	20 BHD	1.74	15.67
MUSCAT SE INDEX	4,694.18	0.34	-0.07	-1.13	-4.27	-4.27	5 OMR	0.93	13.25
SP GCC Comp LMC	171.29	-1.29	-3.29	-4.79	-3.39	-3.39			
SP UAE PRICE INDEX	135.25	-0.94	-2.37	1.03	-1.61	-1.61			

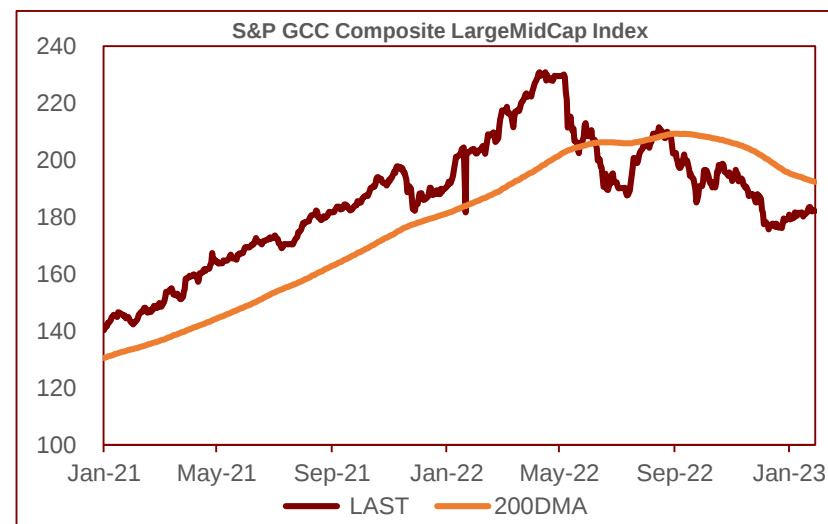
Developed Markets

MSCI World Index	2,721.63	0.24	-1.91	-1.71	5.18	5.18			
U.S. (S&P 500)	3,982.24	0.53	-1.91	-1.58	4.50	4.50			
U.K. (FTSE 100)	7,935.11	-0.29	-1.31	1.75	6.12	6.12			
Japan (Topix)	1,993.28	0.00	-1.29	0.00	4.42	4.42			

Emerging Markets

MSCI EM Index	967.25	0.58	-2.31	-4.24	3.28	3.28			
China (SSE Composite)	3,267.37	-0.11	1.18	0.98	6.42	6.42			
India (Sensex)	59,229.52	-0.23	-2.79	0.09	-2.03	-2.03			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,235.50	-0.51	-1.33	-0.14	-0.35	-0.35	47.05 KWD	1.75	27.86
Kuwait Premier Index	8,064.04	-0.71	-1.54	0.25	-0.12	-0.12	37.09 KWD	1.76	23.31
Kuwait Main Index	5,528.75	0.41	-0.33	-1.62	-1.15	-1.15	9.96 KWD	1.67	44.90
NIC 50	9,058.75	-0.59	-1.55	0.24	-0.13	-0.28	28.60 KWD	1.74	22.31
Kuwait Sector									
Banking	1,811.16	-0.84	-1.61	0.39	1.48	1.48	30.67 KWD	1.29	24.31
Telecom	1,157.92	1.08	0.98	-3.05	-1.72	-1.72	3.56 KWD	1.99	11.83
Industrials	984.40	0.41	-1.11	0.61	-8.62	-8.62	3.47 KWD	0.77	18.15
Financial services	1,237.29	-0.53	-1.75	-1.08	-1.35	-1.35	3.55 KWD	0.68	17.34
Real estate	1,132.71	-0.48	-2.72	-4.49	-6.06	-6.06	2.47 KWD	0.55	22.20
Basic materials	854.49	0.11	-0.39	-0.89	-1.12	-1.12	0.76 KWD	1.28	8.28
Health care	460.03	0.00	2.84	3.68	-0.39	-0.39	0.23 KWD	2.46	13.39
Consumer services	480.62	0.15	2.10	0.43	0.35	0.35	0.74 KWD	0.95	12.16
Insurance	1,625.39	0.13	2.23	4.96	5.15	5.15	0.67 KWD	0.83	10.09
Consumer Disc	1,448.06	0.22	0.41	3.78	-2.02	-2.02	0.15 KWD	0.96	0.00
Energy	1,003.37	-0.32	-5.02	-5.26	-8.59	-8.59	0.22 KWD	0.57	4.65
Technology	677.30	-1.17	-5.96	-2.62	-2.72	-2.72	0.01 KWD	0.83	0.00
Utilities	484.21	-0.54	-1.08	0.55	-2.66	-2.66	0.20 KWD	1.69	15.05



What Move the GCC markets

Oil Prices

Asia-Pacific markets were mixed on Thursday as investors digested minutes released by the U.S. Federal Reserve that showed members are still committed to fighting inflation with rate hikes. Brent crude futures for April delivery reached \$83.16 a barrel.

Kuwait Market

The market closed down today by – 0.51% at 7,235.50 value traded 35.2 million KD, Premier market value traded reached 30.2 million KD down by – 0.71% at 8,064.04.

KSA Market

The market closed down today by – 1.13% at 9,994.79.

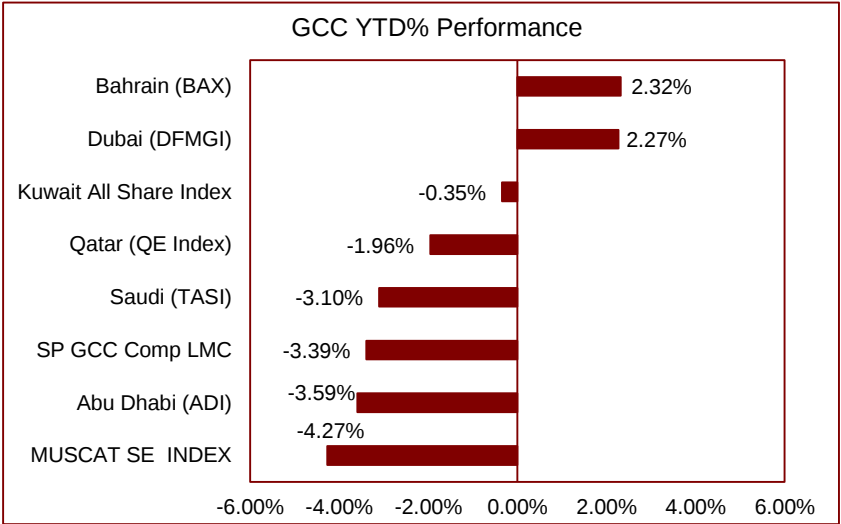


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.077	-2.00	-2.80	-1.82	-0.09	-0.09	8.14 KWD	2.00	27.00
KFH	0.868	-0.57	-1.14	3.83	5.47	5.47	11.65 KWD	1.97	32.00
Zain	0.553	0.36	0.91	-0.18	-1.78	-1.78	2.39 KWD	1.99	11.83
BOUBYAN BANK	0.758	-0.66	-2.57	-3.32	-5.01	-5.01	2.84 KWD	2.99	34.00
Agility	0.593	0.85	-2.47	0.34	-17.64	-17.64	1.59 KWD	1.10	38.76
Saudi Arabia									
ARAMCO	31.80	-1.85	-3.78	-3.49	-0.93	-0.93	6,821.27 SAR	4.91	12.00
SABIC	90.90	-1.94	-4.92	-1.94	1.68	1.68	275.75 SAR	1.51	35.00
STC	34.70	-0.86	-4.80	-5.96	-5.19	-5.19	171.78 SAR	2.34	14.16
AL-RAJHI BANK	72.30	-2.56	-5.12	-11.83	-3.86	-3.86	279.65 SAR	2.79	18.20
NCB	47.85	0.53	-2.25	1.16	-5.25	-5.25	211.40 SAR	1.26	11.51
United Arab Emirates									
ETISALAT.AD	25.62	-1.16	-4.97	-0.31	12.07	12.07	206.60 AED	5.10	21.10
FAB.AD	14.10	0.00	0.71	3.68	-17.54	-17.54	155.78 AED	1.35	11.94
EMIRATES NBD	13.35	-1.84	-0.37	3.09	2.69	2.69	84.64 AED	0.91	6.77
DB ISLAMIC BK	5.64	-1.57	-1.40	1.62	-1.05	-1.05	41.06 AED	0.99	8.12
EMAAR PROPERT	5.40	-1.82	-4.93	-2.88	-7.85	-7.85	48.26 AED	0.69	6.58
Qatar									
QNB	16.11	-2.07	-0.56	-10.50	-10.50	-10.50	151.93 QAR	1.45	11.50
INDUSTRIES QAT	13.84	0.73	-1.14	-1.49	8.04	8.04	83.44 QAR	2.00	9.51
QA ISLAMIC BK	18.33	-9.66	-6.05	-6.81	-1.24	-1.24	43.41 QAR	1.60	11.43
MASRAF AL RAYA	2.74	0.33	-1.51	0.33	-13.62	-13.62	25.43 QAR	1.06	17.44
MESAIEED PETRO	2.11	-0.14	1.79	-2.00	-0.94	-0.94	26.48 QAR	1.53	15.05
OMAN									
BANK MUSCAT	0.285	-0.35	0.35	3.26	3.64	3.64	2.16 OMR	0.97	8.33
OMANTEL	0.932	4.95	0.00	-1.69	1.30	1.30	0.71 OMR	1.20	7.69
BANK DHOFAR	0.151	0.67	0.67	0.67	-13.71	-13.71	0.46 QAR	0.64	14.93
NAT BANK OF OMAN	0.264	0.00	0.76	-3.65	-8.65	-8.65	0.43 QAR	0.67	12.71
OMINVEST	0.420	0.00	0.00	0.48	0.00	0.00	0.28 QAR	0.83	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
15-Feb 23	24.78%	16.71%	0.06%	1.35%	0.40%	4.42%	17.68%	15.25%	5.85%	5.16%
22-Feb 23	24.76%	16.65%	0.06%	1.34%	0.42%	4.46%	17.71%	15.22%	5.84%	5.12%

End of Report
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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is down today by -0.51 %The leading sector bottom performance indices today are Technology -1.17 % Banking -0.84 % Utilities -0.54 % respectively

KSA
Saudi Armco has a negative performance today by -1.85 %, SABIC has a negative performance today by -1.94 %, STC has a negative performance today by -0.86 %, Al Rajhi Bank has a negative performance today by -2.56 %

U.A.E
ETISALAT .AD have negative performance today by -1.16 %, FAB.AD flat performance today



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