



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, March 23rd 2023

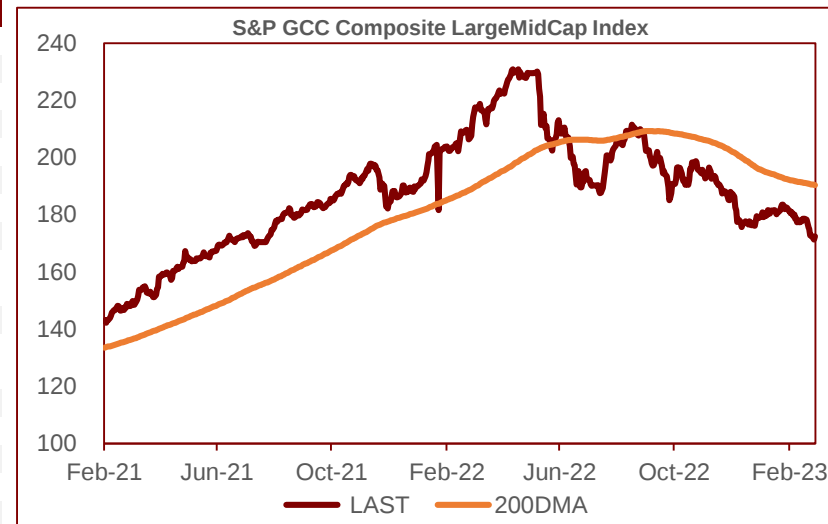




Market Watch

Thursday, March 23rd 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,446.39	0.93	4.71	3.40	-0.31	-0.31	9,904 SAR	1.65	16.94
Qatar (QE Index)	10,006.20	0.26	0.97	-5.34	-6.32	-6.32	509 QAR	1.23	11.00
Dubai (DFMGI)	3,349.48	-0.85	1.72	-2.15	0.83	0.83	486 AED	1.15	18.04
Abu Dhabi (ADI)	9,502.51	-0.56	1.15	-2.99	-6.47	-6.47	1,435 AED	1.70	15.73
Bahrain (BAX)	1,898.51	-0.18	0.08	-1.72	0.17	0.17	19 BHD	1.72	18.00
MUSCAT SE INDEX	4,871.01	-0.52	-0.34	2.48	0.28	0.28	5 OMR	1.02	13.25
SP GCC Comp LMC	172.63	0.41	3.61	0.36	-3.21	-3.21			
SP UAE PRICE INDEX	128.84	-0.75	1.78	-4.29	-5.16	-5.16			
Developed Markets									
MSCI World Index	2,692.55	0.40	0.70	-0.65	3.62	3.62			
U.S. (S&P 500)	3,970.99	0.30	-0.29	-0.54	2.84	2.84			
U.K. (FTSE 100)	7,405.45	-0.89	1.21	-4.78	0.64	0.64			
Japan (Topix)	1,955.32	-0.29	1.04	-1.80	3.47	3.47			
Emerging Markets									
MSCI EM Index	972.18	1.69	3.87	1.43	2.24	2.24			
China (SSE Composite)	3,265.65	0.64	1.85	0.21	6.39	6.39			
India (Sensex)	57,527.10	-0.50	0.50	-1.76	-4.79	-4.79			
Kuwait									
Kuwait All Share Index	7,050.87	-0.15	0.07	-2.67	-3.31	-3.31	45.59 KWD	1.67	26.09
Kuwait Premier Index	7,812.31	-0.30	-0.35	-3.19	-3.74	-3.74	35.66 KWD	1.66	22.27
Kuwait Main Index	5,530.62	0.52	1.96	-0.33	-1.18	-1.18	9.93 KWD	1.71	39.86
NIC 50	8,737.06	-0.13	-0.36	-3.20	-3.75	-3.82	28.60 KWD	1.64	21.27
Kuwait Sector									
Banking	1,750.77	-0.19	-0.50	-3.27	-2.40	-2.40	29.46 KWD	1.24	23.27
Telecom	1,149.82	-0.24	-0.87	-1.85	-2.68	-2.68	3.52 KWD	1.94	11.56
Industrials	981.31	0.39	1.86	-0.92	-9.04	-9.04	3.45 KWD	0.76	14.09
Financial services	1,194.11	-0.16	1.82	-3.40	-5.02	-5.02	3.44 KWD	0.68	20.47
Real estate	1,089.88	-0.14	-0.53	-4.57	-9.83	-9.83	2.37 KWD	0.53	16.47
Basic materials	834.31	1.45	0.10	-1.16	-3.56	-3.56	0.75 KWD	1.33	7.71
Health care	455.49	0.00	-1.47	-0.99	-1.38	-1.38	0.23 KWD	2.48	10.05
Consumer services	460.72	-0.66	-0.88	-3.73	-4.01	-4.01	0.73 KWD	0.86	11.38
Insurance	1,893.46	-2.27	16.27	16.34	22.09	22.09	0.78 KWD	0.81	10.16
Consumer Disc	1,465.25	0.43	0.04	0.60	-1.45	-1.45	0.14 KWD	0.93	0.00
Energy	994.64	0.22	-0.98	-2.28	-12.64	-12.64	0.21 KWD	0.57	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	-1.12	-1.67	-3.30	-6.38	-6.38	0.19 KWD	1.66	13.38



What Move the GCC markets

Oil Prices

Oil prices fell on Thursday following three sessions of gains, after Federal Reserve Chair Jerome Powell highlighted banking sector credit risks for the world's largest economy, while U.S. crude stocks rose more than expected. Brent crude futures had fallen 64 cents, or 0.9%, to \$76.03 a barrel.

Kuwait Market

The market closed down today by - 0.15% at 7,050.87 value traded 32.5 million KD, Premier market value traded reached 30.1 million KD down by - 0.30% at 7,812.31.

KSA Market

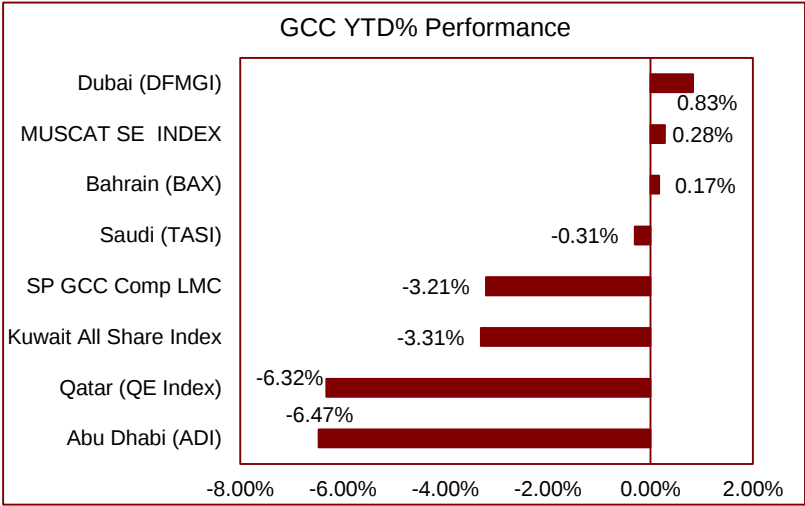
The market closed up today by + 0.93% at 10,446.39.



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.060	-0.19	-0.56	-0.93	-1.67	-1.67	8.00 KWD	1.97	27.00
KFH	0.824	-0.60	-0.12	-3.85	0.12	0.12	11.05 KWD	1.87	32.00
Zain	0.540	0.00	-0.55	-3.40	-4.09	-4.09	2.33 KWD	1.94	11.56
BOUBYAN BANK	0.651	-2.40	-6.47	-14.90	-18.42	-18.42	2.43 KWD	2.56	34.00
Agility	0.613	0.49	3.90	1.66	-14.86	-14.86	1.64 KWD	1.13	40.07
Saudi Arabia									
ARAMCO	32.15	1.42	3.88	1.10	0.16	0.16	7,073.56 SAR	4.88	11.93
SABIC	90.30	2.15	5.61	2.03	1.01	1.01	270.92 SAR	1.46	35.00
STC	39.00	0.26	4.14	10.95	6.56	6.56	195.02 SAR	2.64	15.95
AL-RAJHI BANK	73.50	1.24	4.11	4.55	-2.26	-2.26	294.02 SAR	2.93	18.61
NCB	46.45	0.98	11.93	-1.69	-8.02	-8.02	208.02 SAR	1.24	11.23
United Arab Emirates									
ETISALAT.AD	23.76	-0.17	2.41	-6.82	3.94	3.94	206.60 AED	5.10	21.10
FAB.AD	13.42	-2.04	3.39	-4.69	-21.52	-21.52	143.62 AED	1.25	11.37
EMIRATES NBD	12.85	-0.39	0.39	-5.51	-1.15	-1.15	81.48 AED	0.87	6.49
DB ISLAMIC BK	5.52	-0.18	0.55	-3.83	-3.16	-3.16	37.72 AED	0.91	7.90
EMAAR PROPERT	5.52	-2.13	6.15	-1.43	-5.80	-5.80	47.99 AED	0.70	6.63
Qatar									
QNB	15.91	0.70	0.89	-5.58	-11.61	-11.61	146.89 QAR	1.40	11.07
INDUSTRIES QAT	12.95	0.94	1.89	-6.97	1.09	1.09	78.32 QAR	1.87	8.89
QA ISLAMIC BK	17.65	0.17	0.23	-5.11	-4.90	-4.90	41.69 QAR	1.53	10.92
MASRAF AL RAYA	2.61	-0.38	4.36	-3.37	-17.72	-17.72	24.25 QAR	1.01	16.55
MESAIEED PETRO	1.94	-0.82	0.00	-7.66	-8.79	-8.79	24.36 QAR	1.40	13.79
OMAN									
BANK MUSCAT	0.275	-5.17	-3.51	-5.82	0.00	0.00	2.06 OMR	0.92	8.33
OMANTEL	1.085	22.18	3.33	13.02	17.93	17.93	0.81 OMR	1.28	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	0.270	0.00	-1.82	1.50	-6.57	-6.57	0.44 QAR	0.69	12.71
OMINVEST	0.500	0.00	-1.96	9.65	19.05	19.05	0.33 QAR	0.94	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
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.



Leading Sector, Security Performance

Kuwait
The market is down today by -0.15 %The leading sector bottom performance indices today are Insurance -2.27 % Utilities -1.12 % Consumer services -0.66 % respectively

KSA
Saudi Armco has a positive performance today by + 1.42 %, SABIC have positive performance today by + 2.14 %, STC has a positive performance today by + 0.26 %, Al Rajhi Bank has a positive performance today by + 1.24 %

U.A.E
ETISALAT .AD have negative performance today by -0.17 %, FAB.AD have negative performance today by -2.04 %



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