



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, May 23th 2023



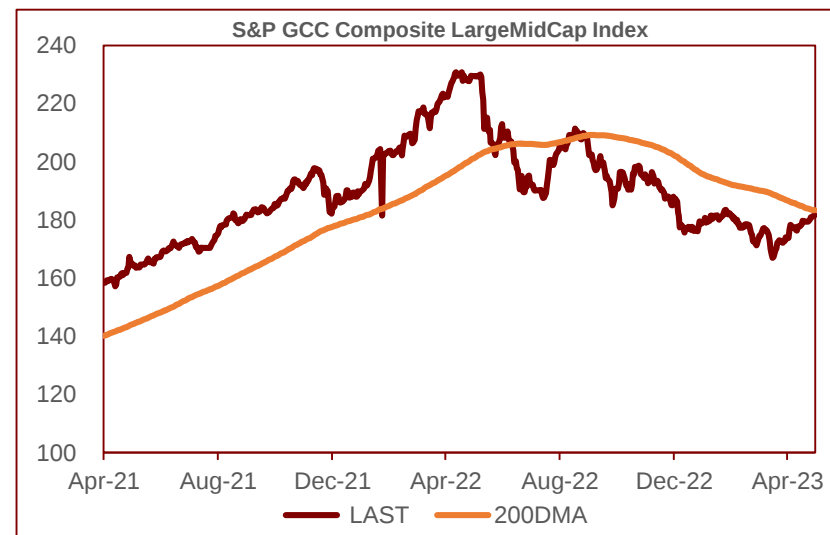


Market Watch

Tuesday, May 23, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,275.77	-0.47	-0.60	-0.28	6.47	7.61	10,807 SAR	2.03	18.44
Qatar (QE Index)	10,608.44	-0.27	-0.33	4.20	3.88	-0.68	569 QAR	1.40	11.47
Dubai (DFMGI)	3,533.23	-0.45	-0.32	-0.33	3.71	5.91	505 AED	1.29	15.96
Abu Dhabi (ADI)	9,489.89	-0.39	0.12	-3.06	0.63	-7.06	1,435 AED	1.80	20.71
Bahrain (BAX)	1,961.33	0.60	0.94	2.99	3.96	3.49	20 BHD	1.61	17.63
MUSCAT SE INDEX	4,686.26	-0.36	-0.22	-0.67	-3.64	-3.52	5 OMR	1.00	13.25
SP GCC Comp LMC	178.65	-0.55	-0.70	-1.65	2.87	-0.07			
SP UAE PRICE INDEX	131.44	-0.62	0.00	-4.39	2.71	-4.40			
Developed Markets									
MSCI World Index	2,816.85	-1.01	-0.91	-0.67	0.91	8.23			
U.S. (S&P 500)	4,145.58	-1.12	-1.11	-0.57	0.88	7.97			
U.K. (FTSE 100)	7,762.95	-0.10	0.08	-1.37	1.72	4.18			
Japan (Topix)	2,161.49	-0.66	-0.01	5.06	7.89	14.26			
Emerging Markets									
MSCI EM Index	978.60	-0.47	0.14	0.16	-1.18	2.32			
China (SSE Composite)	3,246.24	-1.52	-1.14	-2.32	-0.81	5.08			
India (Sensex)	61,981.79	0.03	0.41	1.42	5.07	1.88			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,757.99	-0.11	-0.63	-5.38	-4.15	-7.32	43.77 KWD	1.63	18.94
Kuwait Premier Index	7,457.41	-0.08	-0.56	-5.75	-4.66	-8.11	34.01 KWD	1.59	19.02
Kuwait Main Index	5,395.80	-0.24	-0.91	-3.76	-1.91	-3.59	9.75 KWD	1.80	18.68
NIC 50	8,864.77	0.00	-0.57	-5.76	-4.67	-2.41	28.60 KWD	1.57	18.02
Kuwait Sector									
Banking	1,652.92	0.00	-0.70	-5.88	-5.70	-7.86	27.85 KWD	1.19	20.02
Telecom	1,066.41	-0.96	-1.65	-9.21	-5.82	-9.74	3.27 KWD	1.30	8.44
Industrials	958.06	-0.98	-1.02	-4.72	-2.93	-11.20	3.38 KWD	0.78	19.61
Financial services	1,163.21	0.22	-0.91	-5.46	-2.74	-7.48	3.37 KWD	0.70	19.89
Real estate	1,103.44	-0.17	1.46	-3.57	2.15	-8.71	2.39 KWD	0.53	20.76
Basic materials	881.42	0.27	1.58	-1.19	2.83	1.89	0.78 KWD	1.27	4.46
Health care	458.82	0.00	0.00	0.40	0.73	-0.66	0.23 KWD	0.98	6.83
Consumer services	518.88	0.87	-0.24	13.56	16.53	8.11	0.73 KWD	0.81	13.35
Insurance	2,148.39	0.44	0.10	1.64	12.48	38.53	0.88 KWD	0.90	8.71
Consumer Disc	1,482.97	0.05	0.45	1.76	1.44	-0.26	0.16 KWD	0.97	0.00
Energy	1,000.00	2.18	0.27	2.16	0.21	-12.17	0.21 KWD	0.62	4.49
Technology	581.27	0.00	-0.13	-0.13	-8.58	-16.51	0.01 KWD	0.72	0.00
Utilities	478.95	0.00	-1.09	4.00	2.83	-3.19	0.20 KWD	1.83	14.91



What Move the GCC markets

Oil Prices

Oil prices gained on Wednesday after U.S. oil and fuel supplies tightened and as a warning from the Saudi energy minister to speculators raised the prospect of further OPEC+ output cuts. Brent crude futures rose 86 cents, or 1.1%, to \$77.70 a barrel.

Kuwait Market

The market closed down today by - 0.11% at 6,757.99 value traded 52.2 million KD, Premier market value traded reached 43.7 million KD down by - 0.08% at 7,457.41.

KSA Market

The market closed down today by - 0.47% at 11,275.77.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



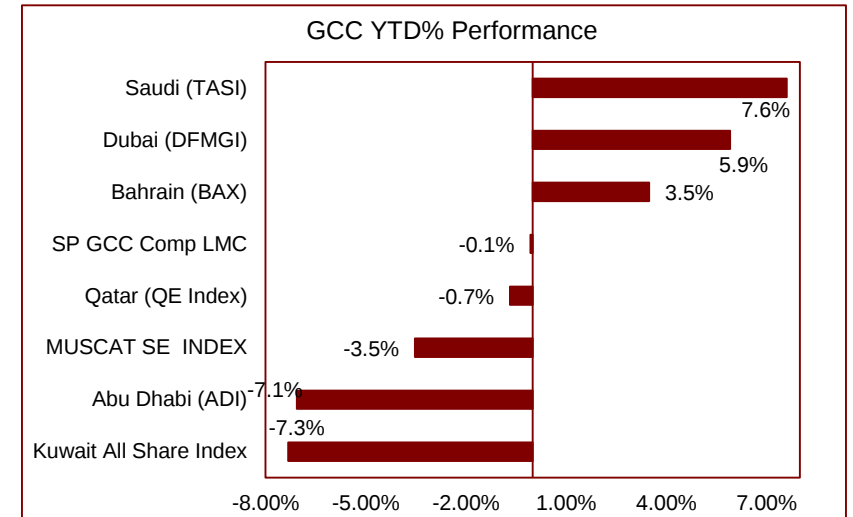
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.930	0.43	-0.32	-7.37	-7.53	-9.42	7.38 KWD	1.87	27.00
KFH	0.705	0.00	-1.54	-4.86	-6.11	-5.77	10.41 KWD	1.79	32.00
Zain	0.506	-1.17	-1.94	-10.12	-6.30	-10.12	2.19 KWD	1.71	10.79
BOUBAYAN BANK	0.596	0.00	2.41	-9.83	-1.75	-20.83	2.36 KWD	2.66	34.00
Agility	0.607	-1.62	-0.82	-1.46	-2.25	-15.69	1.62 KWD	0.85	21.88
Saudi Arabia									
ARAMCO	32.10	-0.47	-0.93	-2.73	9.32	10.00	7,768.20 SAR	5.21	13.88
SABIC	90.10	0.00	-1.21	-3.01	-0.22	0.78	270.30 SAR	1.45	35.00
STC	44.05	-1.23	-0.45	-0.79	9.99	20.36	220.25 SAR	2.94	18.19
AL-RAJHI BANK	74.10	-0.54	-1.07	-3.64	0.82	-1.46	296.40 SAR	2.99	17.36
NCB	37.65	-0.66	-0.92	2.12	10.03	-0.10	225.90 SAR	1.31	12.23
United Arab Emirates									
ETISALAT.AD	22.98	0.61	4.36	-4.25	4.17	0.52	206.60 AED	5.10	21.10
FAB.AD	13.22	-1.20	-2.94	-6.77	2.64	-22.69	146.06 AED	1.30	12.45
EMIRATES NBD	13.75	-0.72	-0.72	-2.48	4.56	5.77	86.86 AED	0.91	5.19
DB ISLAMIC BK	5.26	-1.31	-1.87	-5.40	0.57	-7.72	38.09 AED	0.94	7.31
EMAAR PROPERT	5.82	-2.18	-2.18	-1.85	3.93	-0.68	51.45 AED	0.72	6.13
Qatar									
QNB	16.73	-1.06	-1.30	9.35	4.11	-7.06	154.95 QAR	1.52	11.05
INDUSTRIES QAT	13.00	0.00	-0.69	0.39	0.00	1.48	78.87 QAR	2.15	10.81
QA ISLAMIC BK	18.09	-1.42	-2.43	1.12	1.74	-2.53	42.86 QAR	1.60	11.05
MASRAF AL RAYA	2.72	0.04	0.11	3.94	-7.95	-14.22	25.37 QAR	1.07	20.68
MESAIEED PETRO	2.08	0.73	1.17	5.80	8.33	-2.21	26.20 QAR	1.60	16.40
OMAN									
BANK MUSCAT	0.263	-1.87	-2.23	-3.66	-4.36	-4.36	1.97 OMR	0.91	8.33
OMANTEL	0.972	9.46	-1.22	-2.80	-11.64	5.65	0.73 OMR	1.20	7.69
BANK DHOFAR	0.176	0.00	0.00	13.55	10.00	0.57	0.53 QAR	0.74	14.93
NAT BANK OF OMAN	0.288	0.00	2.86	4.73	7.46	-0.35	0.47 QAR	0.73	12.71
OMINVEST	0.378	-1.05	-1.05	-6.90	-23.79	-10.00	0.25 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, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.11 % The leading sector bottom performance indices today are Industrials -0.98 % Telecom -0.96 % Real estate -0.17 % respectively

KSA

Saudi Armco have negative performance today by -0.47 %, SABIC flat performance today 0 %. STC have negative performance today by -1.23 %, Al Rajhi Bank have negative performance today by -0.54 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.61 %, FAB.AD have negative performance today by -1.2 %



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