



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, January 24th 2023

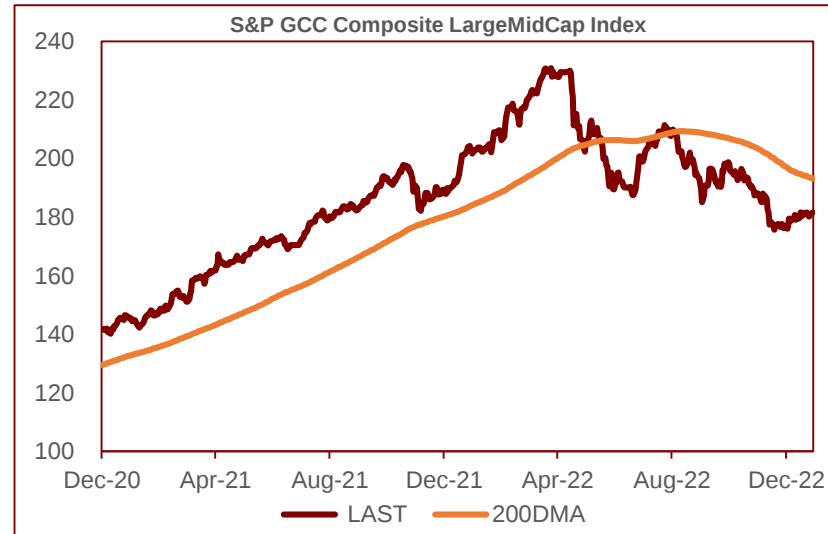




Market Watch

Tuesday, January 24, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,795.60	0.28	1.06	3.03	3.03	3.03	10,210 SAR	1.73	15.57
Qatar (QE Index)	11,105.55	0.73	2.73	3.97	3.97	3.97	571 QAR	1.40	12.66
Dubai (DFMGI)	3,364.00	0.42	0.32	0.84	0.84	0.84	487 AED	1.19	12.97
Abu Dhabi (ADI)	10,222.04	0.62	0.30	0.11	0.11	0.11	1,435 AED	2.00	19.80
Bahrain (BAX)	1,928.61	0.17	0.07	1.76	1.76	1.76	20 BHD	1.66	15.20
MUSCAT SE INDEX	4,786.21	0.15	-0.26	-1.47	-1.47	-1.47	5 OMR	0.95	13.25
SP GCC Comp LMC	183.45	0.43	1.38	2.62	2.62	2.62			
SP UAE PRICE INDEX	139.86	0.70	0.59	1.72	1.72	1.72			
Developed Markets									
MSCI World Index	2,755.96	0.04	2.63	5.89	5.89	5.89			
U.S. (S&P 500)	4,016.95	-0.07	3.03	4.62	4.62	4.62			
U.K. (FTSE 100)	7,757.36	-0.35	0.13	4.10	4.10	4.10			
Japan (Topix)	1,972.92	1.42	2.99	4.29	4.29	4.29			
Emerging Markets									
MSCI EM Index	1,039.20	0.05	1.10	8.66	8.66	8.66			
China (SSE Composite)	3,264.81	0.00	0.76	5.68	5.68	5.68			
India (Sensex)	60,978.75	0.06	0.20	0.23	0.23	0.23			
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,374.66	0.16	1.62	1.13	1.13	1.13	47.65 KWD	2.16	29.09
Kuwait Premier Index	8,192.25	0.14	1.67	0.94	0.94	0.94	37.46 KWD	2.29	24.92
Kuwait Main Index	5,702.31	0.24	1.44	1.89	1.89	1.89	10.19 KWD	1.67	44.51
NIC 50	9,191.49	0.14	1.66	0.93	0.93	7.85	28.60 KWD	2.27	23.92
Kuwait Sector									
Banking	1,833.32	0.16	1.48	2.20	2.20	2.20	30.84 KWD	1.39	25.92
Telecom	1,239.84	-0.64	2.24	4.94	4.94	4.94	3.80 KWD	2.04	12.11
Industrials	996.34	0.56	2.95	-7.65	-7.65	-7.65	3.51 KWD	0.79	18.41
Financial services	1,277.42	0.10	1.46	1.61	1.61	1.61	3.62 KWD	0.73	16.24
Real estate	1,197.39	0.83	1.86	-0.94	-0.94	-0.94	2.60 KWD	0.59	23.87
Basic materials	858.79	-0.08	1.82	-0.73	-0.73	-0.73	0.77 KWD	1.28	8.31
Health care	443.69	0.00	0.00	-3.93	-3.93	-3.93	0.22 KWD	2.47	11.92
Consumer services	501.84	0.82	1.73	4.56	4.56	4.56	0.71 KWD	0.95	11.30
Insurance	1,565.02	0.74	0.97	0.92	0.92	0.92	0.64 KWD	0.82	9.50
Consumer Disc	1,396.13	0.30	0.10	-6.10	-6.10	-6.10	0.15 KWD	0.99	0.00
Energy	1,139.99	0.07	2.31	0.13	0.13	0.13	0.24 KWD	0.78	4.66
Technology	756.60	0.00	3.28	8.67	8.67	8.67	0.01 KWD	0.93	0.00
Utilities	476.32	0.00	0.00	-3.72	-3.72	-3.72	0.20 KWD	1.68	14.88



What Move the GCC markets

Oil Prices

Crude oil prices were steady on Tuesday as concerns about a global economic slowdown and expected build in U.S. oil inventories were offset by hopes of a fuel demand recovery from top importer China. Brent crude was down 30 cents, or 0.3%, at \$87.89 a barrel.

Kuwait Market

The market closed up today by + 0.16% at 7,374.66 value traded 61.1 million KD, Premier market value traded reached 43.9 million KD up by + 0.14% at 8,192.25.

KSA Market

The market closed up today by + 0.28% at 10,795.60.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



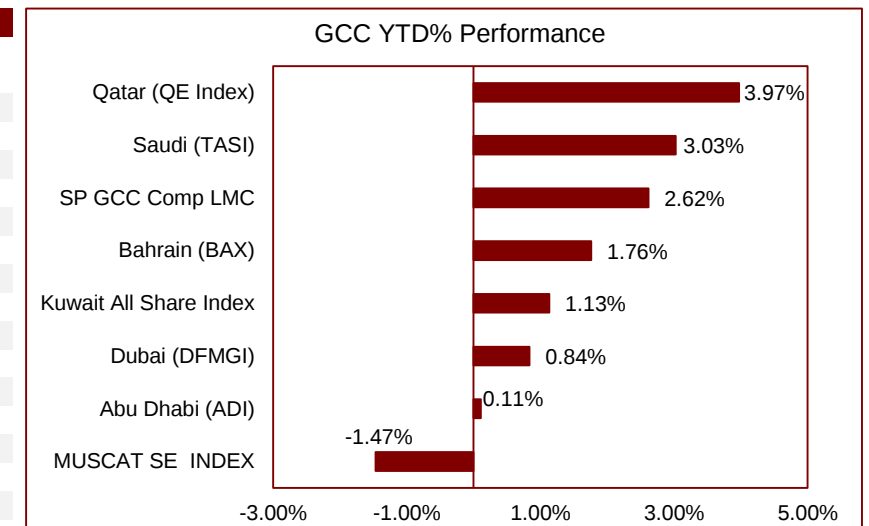
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.109	0.82	0.82	2.88	2.88	2.88	8.37 KWD	2.13	27.00
KFH	0.844	-0.12	2.93	2.55	2.55	2.55	11.32 KWD	3.48	32.00
Zain	0.566	-0.70	1.07	0.53	0.53	0.53	2.45 KWD	2.04	12.11
BOUBYAN BANK	0.812	0.25	0.37	1.75	1.75	1.75	3.03 KWD	3.22	34.00
Agility	0.607	0.00	3.94	-15.69	-15.69	-15.69	1.62 KWD	1.12	39.67
Saudi Arabia									
ARAMCO	33.20	0.61	3.11	3.43	3.43	3.43	7,303.42 SAR	5.26	12.61
SABIC	95.80	0.84	1.38	7.16	7.16	7.16	287.38 SAR	1.57	35.00
STC	37.50	-0.27	0.00	2.46	2.46	2.46	187.49 SAR	2.55	15.61
AL-RAJHI BANK	79.50	0.76	2.32	5.72	5.72	5.72	317.97 SAR	3.69	20.75
NCB	48.40	0.31	0.73	-4.16	-4.16	-4.16	216.72 SAR	1.32	11.64
United Arab Emirates									
ETISALAT.AD	25.66	-0.62	-0.16	12.25	12.25	12.25	206.60 AED	5.10	21.10
FAB.AD	15.80	2.73	0.64	-7.60	-7.60	-7.60	174.55 AED	1.55	12.55
EMIRATES NBD	12.95	0.78	1.97	-0.38	-0.38	-0.38	81.80 AED	0.92	7.73
DB ISLAMIC BK	5.67	2.16	1.25	-0.53	-0.53	-0.53	41.06 AED	1.01	8.28
EMAAR PROPERT	5.88	0.34	0.51	0.34	0.34	0.34	51.97 AED	0.74	6.77
Qatar									
QNB	18.64	0.22	5.91	3.56	3.56	3.56	172.17 QAR	1.64	12.97
INDUSTRIES QAT	13.90	1.39	1.39	8.51	8.51	8.51	84.10 QAR	2.08	8.86
QA ISLAMIC BK	20.05	2.30	5.53	8.03	8.03	8.03	47.38 QAR	1.74	12.41
MASRAF AL RAYA	3.04	0.50	0.20	-4.13	-4.13	-4.13	28.27 QAR	1.17	19.02
MESAIEED PETRO	2.23	0.00	2.76	4.84	4.84	4.84	28.02 QAR	1.63	14.79
OMAN									
BANK MUSCAT	0.279	-0.36	0.00	1.45	1.45	1.45	2.09 OMR	0.96	8.33
OMANTEL	0.948	6.76	0.00	3.04	3.04	3.04	0.71 OMR	1.20	7.69
BANK DHOFAR	0.165	0.00	-2.94	-5.71	-5.71	-5.71	0.49 QAR	0.70	14.93
NAT BANK OF OMAN	0.290	0.00	1.75	0.35	0.35	0.35	0.47 QAR	0.81	12.71
OMINVEST	0.418	0.48	-0.48	-0.48	-0.48	-0.48	0.28 QAR	0.83	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
11-Jan 23	24.71%	17.26%	0.06%	1.30%	0.37%	4.48%	17.68%	12.26%	5.85%	5.12%
18-Jan 23	24.67%	17.07%	0.06%	1.33%	0.37%	4.50%	17.67%	12.29%	5.86%	5.16%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.16 %The leading sector best performance indices today are Real estate 0.83 % Consumer services 0.82 % Insurance 0.74 % respectively

KSA

Saudi Armco has a positive performance today by + 0.61 %, SABIC has a positive performance today by + 0.84 %, STC has a negative performance today by -0.27 %, Al Rajhi Bank has a positive performance today by + 0.76 %

U.A.E

ETISALAT .AD has a negative performance today by -0.62 %, FAB.AD has a positive performance today by + 2.73 %



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