



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, January 25th 2023

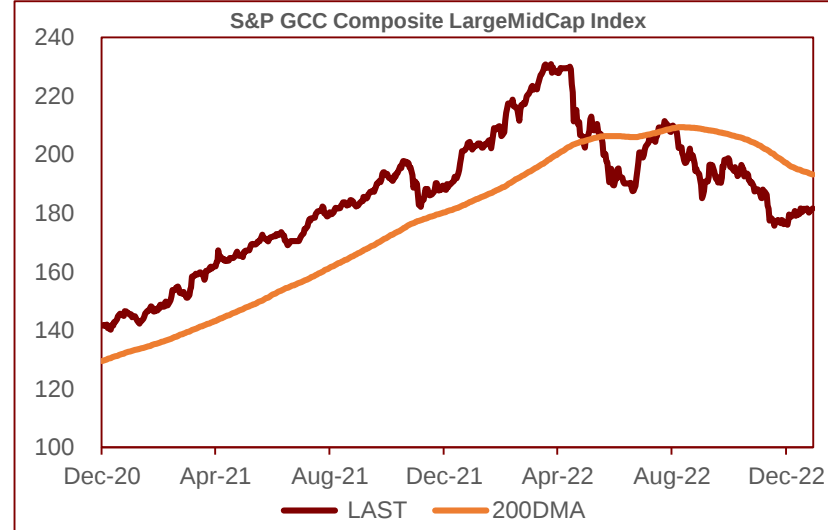




Market Watch

Wednesday, January 25, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,809.15	0.13	1.19	3.16	3.16	3.16	10,196 SAR	1.75	15.56
Qatar (QE Index)	11,161.92	0.51	3.25	4.50	4.50	4.50	572 QAR	1.40	12.69
Dubai (DFMGI)	3,356.62	-0.22	0.10	0.62	0.62	0.62	485 AED	1.19	12.72
Abu Dhabi (ADI)	10,176.69	-0.44	-0.15	-0.34	-0.34	-0.34	1,435 AED	2.00	19.73
Bahrain (BAX)	1,927.13	-0.08	0.00	1.68	1.68	1.68	20 BHD	1.66	15.08
MUSCAT SE INDEX	4,746.85	-0.82	-1.08	-2.28	-2.28	-2.28	5 OMR	0.95	13.25
SP GCC Comp LMC	183.53	0.04	1.42	2.66	2.66	2.66			
SP UAE PRICE INDEX	139.35	-0.37	0.22	1.35	1.35	1.35			
Developed Markets									
MSCI World Index	2,756.73	0.03	2.66	5.92	5.92	5.92			
U.S. (S&P 500)	4,016.22	-0.02	3.01	4.60	4.60	4.60			
U.K. (FTSE 100)	7,744.87	-0.16	-0.03	3.93	3.93	3.93			
Japan (Topix)	1,980.69	0.39	3.40	4.70	4.70	4.70			
Emerging Markets									
MSCI EM Index	1,041.26	0.20	1.30	8.87	8.87	8.87			
China (SSE Composite)	3,264.81	0.00	0.76	5.68	5.68	5.68			
India (Sensex)	60,205.06	-1.27	-1.07	-1.04	-1.04	-1.04			
Kuwait									
Kuwait All Share Index	7,338.66	-0.49	1.13	0.64	0.64	0.64	47.41 KWD	2.14	29.21
Kuwait Premier Index	8,152.06	-0.49	1.17	0.45	0.45	0.45	37.26 KWD	2.27	24.74
Kuwait Main Index	5,675.03	-0.48	0.95	1.40	1.40	1.40	10.15 KWD	1.67	45.68
NIC 50	9,144.70	-0.51	1.16	0.44	0.44	7.30	28.60 KWD	2.25	23.74
Kuwait Sector									
Banking	1,826.89	-0.35	1.12	1.84	1.84	1.84	30.73 KWD	1.39	25.74
Telecom	1,224.50	-1.24	0.97	3.64	3.64	3.64	3.75 KWD	2.03	12.05
Industrials	987.23	-0.91	2.01	-8.49	-8.49	-8.49	3.47 KWD	0.78	18.23
Financial services	1,267.55	-0.77	0.67	0.82	0.82	0.82	3.60 KWD	0.73	16.38
Real estate	1,185.44	-1.00	0.84	-1.93	-1.93	-1.93	2.58 KWD	0.59	23.86
Basic materials	861.62	0.33	2.16	-0.40	-0.40	-0.40	0.77 KWD	1.28	8.34
Health care	443.69	0.00	0.00	-3.93	-3.93	-3.93	0.22 KWD	2.47	11.92
Consumer services	498.78	-0.61	1.11	3.92	3.92	3.92	0.72 KWD	0.95	11.59
Insurance	1,564.29	-0.05	0.93	0.87	0.87	0.87	0.64 KWD	0.82	9.50
Consumer Disc	1,413.24	1.23	1.33	-4.95	-4.95	-4.95	0.15 KWD	0.99	0.00
Energy	1,134.18	-0.51	1.79	-0.38	-0.38	-0.38	0.24 KWD	0.80	4.78
Technology	720.22	-4.81	-1.69	3.45	3.45	3.45	0.01 KWD	0.88	0.00
Utilities	478.95	0.55	0.55	-3.19	-3.19	-3.19	0.20 KWD	1.69	14.97



What Move the GCC markets

Oil Prices

Oil was little changed on Wednesday as a rise in U.S. crude inventories and global recession worries offset optimism for a demand recovery in China. Crude has rallied in 2023, with global benchmark Brent crude topping \$89 a barrel

Kuwait Market

The market closed down today by - 0.49% at 7,338.66 value traded 42.5 million KD, Premier market value traded reached 30.9 million KD down by - 0.49% at 8,152.06.

KSA Market

The market closed up today by + 0.13% at 10,809.15.



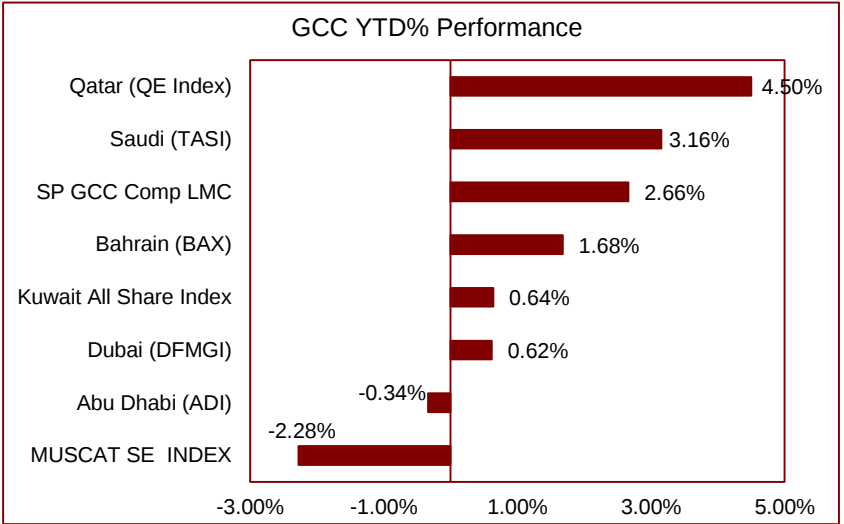
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.115	0.54	1.36	3.43	3.43	3.43	8.41 KWD	2.14	27.00
KFH	0.834	-1.18	1.71	1.34	1.34	1.34	11.18 KWD	3.44	32.00
Zain	0.563	-0.53	0.54	0.00	0.00	0.00	2.43 KWD	2.03	12.05
BOUBYAN BANK	0.808	-0.49	-0.12	1.25	1.25	1.25	3.02 KWD	3.20	34.00
Agility	0.598	-1.48	2.40	-16.94	-16.94	-16.94	1.60 KWD	1.11	39.08
Saudi Arabia									
ARAMCO	33.10	-0.30	2.80	3.12	3.12	3.12	7,281.81 SAR	5.24	12.69
SABIC	97.40	1.67	3.07	8.95	8.95	8.95	292.19 SAR	1.60	35.00
STC	37.45	-0.13	-0.13	2.32	2.32	2.32	187.25 SAR	2.55	15.57
AL-RAJHI BANK	79.80	0.38	2.70	6.12	6.12	6.12	319.19 SAR	3.71	20.91
NCB	48.20	-0.41	0.31	-4.55	-4.55	-4.55	215.83 SAR	1.32	11.67
United Arab Emirates									
ETISALAT.AD	25.66	0.00	-0.16	12.25	12.25	12.25	206.60 AED	5.10	21.10
FAB.AD	15.52	-1.77	-1.15	-9.24	-9.24	-9.24	171.46 AED	1.52	12.33
EMIRATES NBD	12.95	0.00	1.97	-0.38	-0.38	-0.38	81.80 AED	0.92	7.73
DB ISLAMIC BK	5.66	-0.18	1.07	-0.70	-0.70	-0.70	40.98 AED	1.01	8.10
EMAAR PROPERT	5.87	-0.17	0.34	0.17	0.17	0.17	51.88 AED	0.74	6.76
Qatar									
QNB	18.60	-0.21	5.68	3.33	3.33	3.33	171.80 QAR	1.63	12.94
INDUSTRIES QAT	13.88	-0.14	1.24	8.35	8.35	8.35	83.97 QAR	2.07	8.84
QA ISLAMIC BK	20.00	-0.25	5.26	7.76	7.76	7.76	47.26 QAR	1.73	12.38
MASRAF AL RAYA	3.07	0.99	1.19	-3.19	-3.19	-3.19	28.55 QAR	1.18	19.21
MESAIEED PETRO	2.24	0.36	3.13	5.22	5.22	5.22	28.12 QAR	1.64	14.84
OMAN									
BANK MUSCAT	0.273	-2.15	-2.15	-0.73	-0.73	-0.73	2.05 OMR	0.94	8.33
OMANTEL	0.948	6.76	0.00	3.04	3.04	3.04	0.71 OMR	1.20	7.69
BANK DHOFAR	0.160	-3.03	-5.88	-8.57	-8.57	-8.57	0.48 QAR	0.68	14.93
NAT BANK OF OMAN	0.287	-1.03	0.70	-0.69	-0.69	-0.69	0.47 QAR	0.80	12.71
OMINVEST	0.418	0.00	-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 down today by -0.49 %The leading sector bottom performance indices today are Technology -4.81 % Telecom -1.24 % Real estate -1 % respectively

KSA

Saudi Armco has a negative performance today by -0.3 %, SABIC has a positive performance today by + 1.67 %, STC has a negative performance today by -0.13 %, Al Rajhi Bank has a positive performance today by + 0.38 %

U.A.E

ETISALAT .AD has a flat performance today, FAB.AD has a negative performance today by -1.77 %



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