



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, June 25th 2023



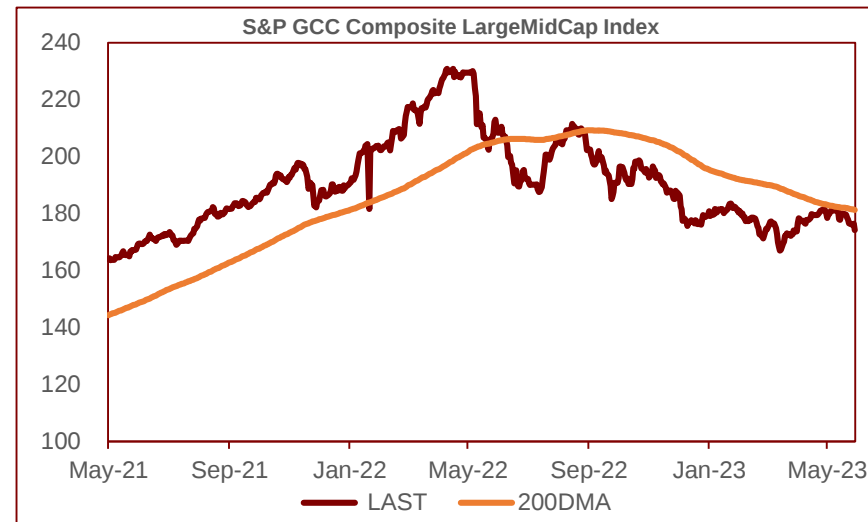


Market Watch

Sunday, June 25, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,458.98	-0.06	0.00	4.04	8.20	9.36	10,903 SAR	2.10	18.25
Qatar (QE Index)	9,843.12	-2.60	-2.60	-3.07	-3.62	-7.85	520 QAR	1.35	11.14
Dubai (DFMGI)	3,792.51	0.43	0.43	6.04	11.32	13.68	542 AED	1.46	19.87
Abu Dhabi (ADI)	9,556.90	0.30	0.30	1.60	1.34	-6.41	1,435 AED	1.81	20.91
Bahrain (BAX)	1,956.32	-0.26	-0.26	-0.37	3.69	3.22	9 BHD	7.46	18.00
MUSCAT SE INDEX	4,747.56	0.35	0.35	2.62	-2.38	-2.26	5 OMR	1.01	13.25
SP GCC Comp LMC	178.63	-0.26	-0.26	2.53	2.86	-0.08			
SP UAE PRICE INDEX	134.82	0.60	0.60	2.99	5.35	-1.95			
Developed Markets									
MSCI World Index	2,902.34	-0.96	-0.96	3.63	3.97	11.51			
U.S. (S&P 500)	4,348.33	-0.77	-0.77	4.03	5.82	13.25			
U.K. (FTSE 100)	7,461.87	-0.54	-0.54	0.21	-2.23	0.14			
Japan (Topix)	2,264.73	-1.38	-1.38	6.29	13.04	19.72			
Emerging Markets									
MSCI EM Index	991.91	-0.92	-0.92	3.48	0.16	3.72			
China (SSE Composite)	3,197.90	0.00	0.00	-0.21	-2.29	3.52			
India (Sensex)	62,979.37	-0.41	-0.41	0.57	6.76	3.52			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,989.68	-0.85	-0.85	2.84	-0.87	-4.15	45.18 KWD	1.69	18.10
Kuwait Premier Index	7,765.92	-0.89	-0.89	3.62	-0.71	-4.31	35.32 KWD	1.66	17.93
Kuwait Main Index	5,429.30	-0.68	-0.68	-0.21	-1.30	-2.99	9.85 KWD	1.81	18.74
NIC 50	8,661.67	-2.95	-2.95	3.61	-0.72	-4.65	28.60 KWD	1.64	16.93
Kuwait Sector									
Banking	1,697.56	-0.84	-0.84	2.85	-3.15	-5.37	28.58 KWD	1.20	18.93
Telecom	1,102.15	-0.69	-0.69	0.53	-2.66	-6.71	3.38 KWD	1.35	8.78
Industrials	1,000.50	-1.04	-1.04	3.42	1.37	-7.26	3.52 KWD	0.82	21.16
Financial services	1,217.38	-1.16	-1.16	2.80	1.79	-3.17	3.51 KWD	0.73	20.44
Real estate	1,200.17	-0.50	-0.50	7.65	11.11	-0.71	2.60 KWD	0.60	22.29
Basic materials	900.81	-1.50	-1.50	-1.94	5.09	4.13	0.79 KWD	1.42	8.12
Health care	434.61	-3.69	-3.69	-5.28	-4.58	-5.90	0.22 KWD	0.91	6.39
Consumer services	606.19	-0.06	-0.06	20.49	36.14	26.30	0.77 KWD	0.87	14.32
Insurance	2,109.99	-0.60	-0.60	-1.23	10.47	36.06	0.87 KWD	0.82	10.80
Consumer Disc	1,561.93	-0.03	-0.03	1.43	6.84	5.05	0.18 KWD	1.10	0.00
Energy	1,024.13	-0.22	-0.22	3.45	2.63	-10.05	0.21 KWD	0.81	4.41
Technology	668.57	5.63	5.63	-3.16	5.15	-3.97	0.01 KWD	0.83	0.00
Utilities	518.42	-1.00	-1.00	7.07	11.30	4.79	0.22 KWD	1.98	16.13



What Move the GCC markets

Oil Prices

Oil prices pared early gains on Monday, tracking a broader calm in financial markets as investors watched warily to see if there'll be further fallout from an attempted insurrection in Russia that could disrupt energy supplies from one of the world's largest oil producer nations. Brent crude settled down 0.39%, or 29 cents, at \$73.85 barrel.

Kuwait Market

The market closed down today by - 0.85% at 6,989.68 value traded 33.4 million KD, Premier market value traded reached 26.4 million KD down - 0.89% at 7,765.92.

KSA Market

The market closed down today by - 0.06% at 11,458.98.



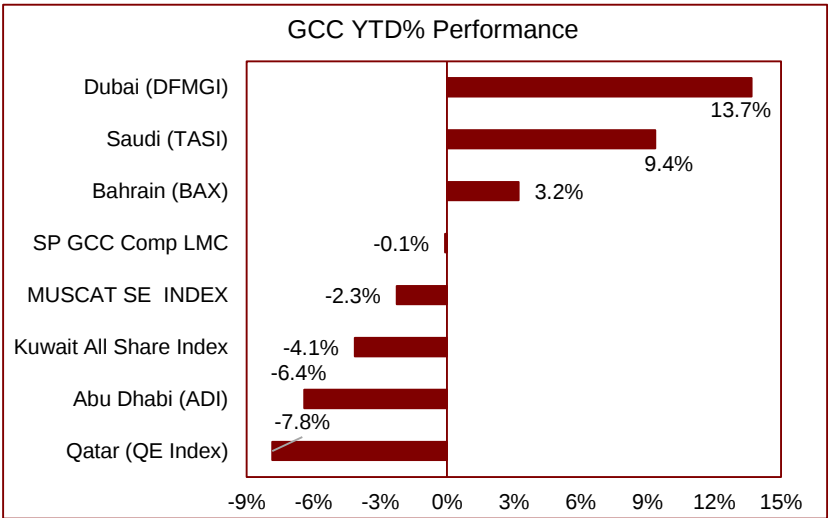
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.935	-0.64	0.32	1.63	-7.03	-8.93	7.41 KWD	1.88	27.00
KFH	0.741	-1.07	2.07	4.81	-1.32	-0.96	10.94 KWD	1.89	32.00
Zain	0.515	-0.58	0.78	-0.96	-4.63	-8.53	2.23 KWD	1.74	10.98
BOUBYAN BANK	0.635	-0.47	2.92	5.83	4.68	-15.65	2.52 KWD	2.84	34.00
Agility	0.620	-1.27	1.31	1.47	-0.16	-13.89	1.66 KWD	0.87	22.35
Saudi Arabia									
ARAMCO	32.25	0.16	-0.62	2.38	9.83	10.51	7,803.46 SAR	5.23	13.84
SABIC	88.20	-0.11	-0.90	0.00	-2.33	-1.34	264.56 SAR	1.42	35.00
STC	43.50	-0.80	0.46	0.58	8.61	18.85	217.47 SAR	2.90	17.80
AL-RAJHI BANK	73.00	0.14	-0.54	3.25	-0.68	-2.93	291.96 SAR	2.94	16.97
NCB	36.80	0.27	-2.65	-0.27	7.54	-2.36	220.77 SAR	1.28	11.83
United Arab Emirates									
ETISALAT.AD	22.34	0.36	-0.36	-3.21	1.27	-2.27	206.60 AED	5.10	21.10
FAB.AD	13.70	1.03	6.70	7.87	6.37	-19.88	151.35 AED	1.35	12.90
EMIRATES NBD	14.90	0.68	6.43	9.16	13.31	14.62	94.12 AED	0.98	5.63
DB ISLAMIC BK	5.47	0.37	2.82	3.99	4.59	-4.04	39.61 AED	0.98	7.61
EMAAR PROPERT	6.59	0.76	8.39	7.15	17.68	12.46	58.25 AED	0.82	6.95
Qatar									
QNB	15.10	-3.21	-6.21	-5.68	-6.04	-16.11	139.45 QAR	1.37	9.97
INDUSTRIES QAT	10.80	-4.09	-8.16	-9.85	-16.92	-15.69	65.33 QAR	1.79	8.98
QA ISLAMIC BK	17.17	-1.66	-3.81	-2.00	-3.43	-7.49	40.56 QAR	1.52	10.49
MASRAF AL RAYA	2.48	-2.86	-5.05	-2.75	-16.07	-21.79	23.06 QAR	0.98	18.86
MESAIEED PETRO	1.88	-2.54	-6.47	-4.52	-2.08	-11.61	23.61 QAR	1.45	14.83
OMAN									
BANK MUSCAT	0.274	-0.36	2.62	4.58	-0.36	-0.36	2.06 OMR	0.95	8.33
OMANTEL	0.988	11.26	1.65	2.49	-10.18	7.39	0.74 OMR	1.22	7.69
BANK DHOFAR	0.173	0.00	0.00	-1.14	8.13	-1.14	0.52 QAR	0.73	14.93
NAT BANK OF OMAN	0.280	0.00	2.56	2.56	4.48	-3.11	0.46 QAR	0.71	12.71
OMINVEST	0.374	0.00	2.19	1.08	-24.60	-10.95	0.25 QAR	0.70	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
14-June 23	24.3%	15.4%	0.06%	1.39%	0.23%	4.89%	17.66%	13.88%	6.14%	4.69%
21-June 23	24.29%	15.53%	0.06%	1.46%	0.24%	4.86%	17.64%	13.89%	6.19%	4.55%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.85 %The leading sector bottom performance indices today are Health care -3.69 % Basic materials -1.5 % Financial services -1.16 % respectively

KSA

Saudi Armco has a positive performance today by + 0.16 %, SABIC has a negative performance today by -0.11%. STC have negative performance today by -0.8 %, Al Rajhi Bank has a positive performance today by + 0.14 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.36 %, FAB.AD has a positive performance today by + 1.03 %



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