



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, May 25th 2023



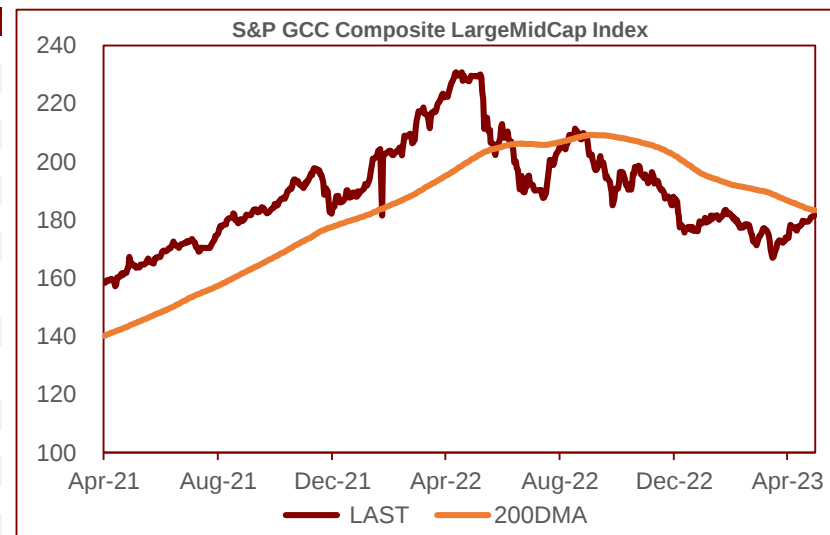


Market Watch

Thursday, May 25, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,184.57	-0.46	-1.41	-1.09	5.61	6.74	10,730 SAR	2.02	17.97
Qatar (QE Index)	10,456.02	-0.65	-1.77	2.70	2.38	-2.11	560 QAR	1.39	11.16
Dubai (DFMGI)	3,541.41	-0.12	-0.53	-0.54	3.50	5.69	504 AED	1.32	15.97
Abu Dhabi (ADI)	9,453.42	-0.67	-0.82	-3.97	-0.32	-7.94	1,435 AED	1.78	20.37
Bahrain (BAX)	1,962.27	0.02	0.99	3.04	4.01	3.54	20 BHD	1.65	17.64
MUSCAT SE INDEX	4,641.78	-0.96	-1.17	-1.62	-4.55	-4.44	5 OMR	0.99	13.25
SP GCC Comp LMC	176.59	-0.75	-1.84	-2.78	1.68	-1.22			
SP UAE PRICE INDEX	129.89	-0.97	-1.18	-5.53	1.49	-5.54			
Developed Markets									
MSCI World Index	2,827.93	0.29	-1.61	-1.38	0.19	7.46			
U.S. (S&P 500)	4,205.45	0.88	-0.97	-0.44	1.02	8.12			
U.K. (FTSE 100)	7,627.20	-0.74	-2.40	-3.81	-0.80	1.60			
Japan (Topix)	2,145.84	-0.29	-0.72	4.31	7.12	13.45			
Emerging Markets									
MSCI EM Index	972.86	-0.71	-1.35	-1.33	-2.65	0.80			
China (SSE Composite)	3,212.50	-0.11	-2.51	-3.67	-2.19	3.63			
India (Sensex)	62,501.69	0.16	0.23	1.24	4.88	1.70			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,764.93	0.14	-0.52	-5.29	-4.05	-7.23	43.87 KWD	1.63	17.38
Kuwait Premier Index	7,463.95	0.16	-0.47	-5.67	-4.57	-8.03	34.10 KWD	1.58	17.02
Kuwait Main Index	5,404.80	0.09	-0.74	-3.60	-1.74	-3.43	9.77 KWD	1.79	18.65
NIC 50	8,864.77	0.00	-0.48	-5.68	-4.58	-2.41	28.60 KWD	1.56	16.02
Kuwait Sector									
Banking	1,653.12	0.10	-0.69	-5.87	-5.69	-7.85	27.92 KWD	1.17	18.02
Telecom	1,066.88	0.25	-1.60	-9.17	-5.77	-9.70	3.27 KWD	1.30	8.44
Industrials	960.40	0.07	-0.78	-4.49	-2.69	-10.98	3.39 KWD	0.79	19.22
Financial services	1,171.18	0.61	-0.23	-4.81	-2.07	-6.85	3.39 KWD	0.70	18.68
Real estate	1,101.23	-0.45	1.26	-3.77	1.95	-8.89	2.39 KWD	0.52	20.67
Basic materials	900.31	2.03	3.76	0.93	5.03	4.07	0.79 KWD	1.39	4.90
Health care	458.82	0.00	0.00	0.40	0.73	-0.66	0.23 KWD	0.98	6.83
Consumer services	519.58	0.73	-0.10	13.71	16.69	8.26	0.74 KWD	0.82	13.95
Insurance	2,143.93	-0.31	-0.11	1.43	12.25	38.24	0.88 KWD	0.76	8.71
Consumer Disc	1,487.38	0.43	0.75	2.07	1.74	0.04	0.16 KWD	0.98	0.00
Energy	997.97	0.20	0.07	1.95	0.01	-12.34	0.21 KWD	0.63	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 fell in early Asian trading on Thursday after uncertainty that the United States will avoid a debt default weighed against the prospect of further OPEC+ production cuts. Brent crude futures slipped 5 cents, or 0.1%, to \$76.26 a barrel.

Kuwait Market

The market closed up today by + 0.14% at 6,764.93 value traded 36.4 million KD, Premier market value traded reached 27.0 million KD up by + 0.16% at 7,463.95.

KSA Market

The market closed down today by – 0.46% at 11,184.57.

DAILY MARKETS WRAP,
NIC RESEARCH AND STUDIES DEP



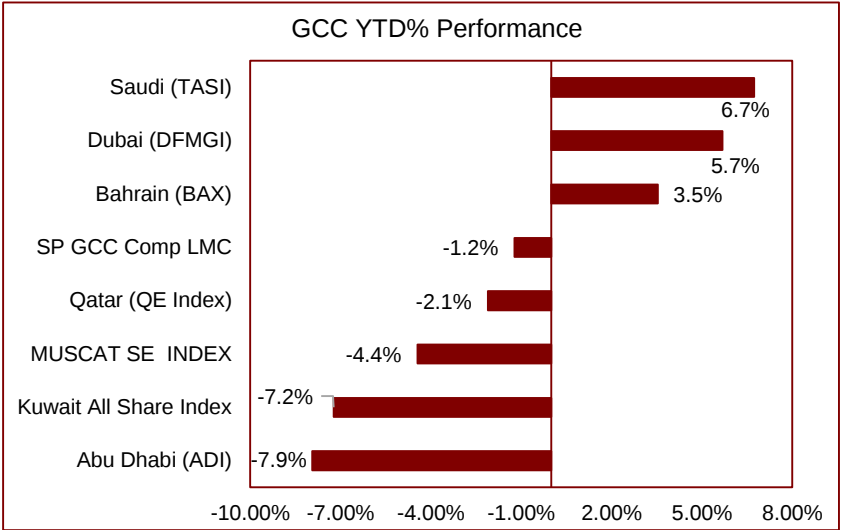
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.923	-0.11	-1.07	-8.07	-8.22	-10.10	7.32 KWD	1.85	27.00
KFH	0.709	0.28	-0.98	-4.32	-5.58	-5.24	10.47 KWD	1.80	32.00
Zain	0.506	0.40	-1.94	-10.12	-6.30	-10.12	2.19 KWD	1.71	10.79
BOUBYAN BANK	0.596	0.00	2.41	-9.83	-1.75	-20.83	2.36 KWD	2.66	34.00
Agility	0.605	-0.33	-1.14	-1.79	-2.58	-15.97	1.62 KWD	0.85	21.81
Saudi Arabia									
ARAMCO	31.90	-0.31	-1.54	-3.33	8.64	9.31	7,719.18 SAR	5.17	13.77
SABIC	90.10	-0.77	-1.21	-3.01	-0.22	0.78	270.28 SAR	1.45	35.00
STC	42.65	-2.40	-3.62	-3.94	6.49	16.53	213.23 SAR	2.85	17.82
AL-RAJHI BANK	72.80	-0.68	-2.80	-5.33	-0.95	-3.19	291.18 SAR	2.93	17.08
NCB	37.55	0.13	-1.18	1.85	9.73	-0.37	225.28 SAR	1.31	12.10
United Arab Emirates									
ETISALAT.AD	22.74	-1.13	3.27	-5.25	3.08	-0.52	206.60 AED	5.10	21.10
FAB.AD	12.90	-1.53	-5.29	-9.03	0.16	-24.56	143.62 AED	1.28	12.15
EMIRATES NBD	13.60	-0.73	-1.81	-3.55	3.42	4.62	86.22 AED	0.90	5.14
DB ISLAMIC BK	5.17	-0.77	-3.54	-7.01	-1.15	-9.30	37.43 AED	0.93	7.19
EMAAR PROPERT	5.85	0.52	-1.68	-1.35	4.46	-0.17	52.06 AED	0.73	6.17
Qatar									
QNB	16.50	-0.60	-2.65	7.84	2.68	-8.33	152.40 QAR	1.50	10.89
INDUSTRIES QAT	12.77	-2.07	-2.44	-1.39	-1.77	-0.31	77.26 QAR	2.12	10.62
QA ISLAMIC BK	17.81	-0.22	-3.94	-0.45	0.17	-4.04	42.08 QAR	1.58	10.88
MASRAF AL RAYA	2.67	-0.74	-1.88	1.87	-9.78	-15.93	24.79 QAR	1.05	20.27
MESAIEED PETRO	2.00	-2.24	-2.53	1.93	4.38	-5.78	25.18 QAR	1.54	15.80
OMAN									
BANK MUSCAT	0.259	-1.15	-3.72	-5.13	-5.82	-5.82	1.94 OMR	0.89	8.33
OMANTEL	0.960	8.11	-2.44	-4.00	-12.73	4.35	0.72 OMR	1.18	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	0.270	-6.25	-3.57	-1.82	0.75	-6.57	0.44 QAR	0.68	12.71
OMINVEST	0.380	0.53	-0.52	-6.40	-23.39	-9.52	0.25 QAR	0.71	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
17-May 23	24.73%	15.98%	0.06%	1.35%	0.23%	4.62%	17.67%	14.04%	6.07%	4.96%
24-May 23	24.55%	15.75%	0.06%	1.35%	0.23%	4.61%	17.69%	14.02%	6.09%	4.96%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.14 %The leading sector best performance indices today are Basic materials 2.03 % Consumer services 0.73 % Financial services 0.61 % respectively

KSA

Saudi Armco has a negative performance today by -0.31 %, SABIC has a negative performance today by -0.77 %, STC has a negative performance today by -2.4 %, Al Rajhi Bank has a negative performance today by -0.68 %

U.A.E

ETISALAT .AD has a negative performance today by -1.13 %, FAB.AD has a negative performance today by -1.53 %



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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