



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday , April 26th 2023



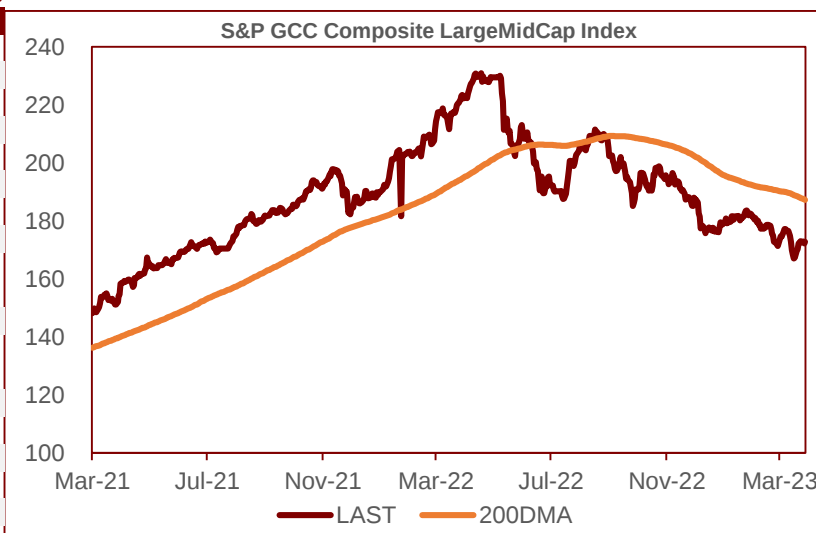


Market Watch

Wednesday, April 26, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,307.22	0.37	1.29	6.77	6.77	7.91	10,966 SAR	1.85	18.73
Qatar (QE Index)	10,072.56	1.43	1.43	-1.37	-1.37	-5.70	530 QAR	1.28	10.81
Dubai (DFMGI)	3,489.78	-0.47	0.54	2.44	2.44	4.61	502 AED	1.21	22.91
Abu Dhabi (ADI)	9,675.96	0.31	0.44	2.61	2.61	-5.24	1,435 AED	1.75	20.96
Bahrain (BAX)	1,895.37	0.42	0.42	0.46	0.46	0.01	20 BHD	1.62	18.00
MUSCAT SE INDEX	4,719.58	-0.51	-0.50	-2.95	-2.95	-2.84	5 OMR	1.02	13.25
SP GCC Comp LMC	181.04	0.42	0.88	4.24	4.24	1.27			
SP UAE PRICE INDEX	134.48	0.16	0.85	5.08	5.08	-2.20			
Developed Markets									
MSCI World Index	2,779.71	-0.35	-1.54	-0.42	-0.42	6.80			
U.S. (S&P 500)	4,055.99	-0.38	-1.88	-1.30	-1.30	5.64			
U.K. (FTSE 100)	7,852.64	-0.49	-0.78	2.89	2.89	5.38			
Japan (Topix)	2,023.90	-0.89	-0.55	1.02	1.02	6.99			
Emerging Markets									
MSCI EM Index	967.85	0.23	-1.31	-2.27	-2.27	1.20			
China (SSE Composite)	3,264.10	-0.02	-1.13	-0.27	-0.27	5.66			
India (Sensex)	60,300.58	0.28	1.08	2.22	2.22	-0.89			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,158.55	0.04	0.04	1.53	1.53	-1.83	46.36 KWD	1.69	21.82
Kuwait Premier Index	7,941.35	0.07	0.07	1.53	1.53	-2.15	36.30 KWD	1.71	22.02
Kuwait Main Index	5,584.82	-0.10	-0.10	1.53	1.53	-0.21	10.06 KWD	1.58	21.11
NIC 50	8,957.24	0.00	0.06	1.52	1.52	-1.39	28.60 KWD	1.69	21.02
Kuwait Sector									
Banking	1,762.99	-0.01	-0.01	0.58	0.58	-1.72	29.70 KWD	1.29	23.02
Telecom	1,175.59	-0.21	-0.21	3.83	3.83	-0.50	3.61 KWD	1.98	9.54
Industrials	1,000.33	0.34	0.34	1.36	1.36	-7.28	3.52 KWD	0.80	18.11
Financial services	1,233.56	-0.05	-0.05	3.14	3.14	-1.88	3.59 KWD	0.74	22.19
Real estate	1,140.11	0.71	0.71	5.55	5.55	-5.68	2.47 KWD	0.54	14.25
Basic materials	891.23	1.01	1.01	3.97	3.97	3.02	0.78 KWD	1.61	8.29
Health care	462.45	0.00	0.00	1.53	1.53	0.13	0.23 KWD	1.06	10.54
Consumer services	451.47	0.23	0.23	1.39	1.39	-5.93	0.73 KWD	0.86	14.06
Insurance	2,116.88	-1.52	-1.52	10.83	10.83	36.50	0.87 KWD	0.77	10.16
Consumer Disc	1,456.53	1.43	1.43	-0.37	-0.37	-2.04	0.14 KWD	0.91	0.00
Energy	996.18	-2.02	-2.02	-0.17	-0.17	-12.50	0.21 KWD	0.65	4.45
Technology	582.00	-1.84	-1.84	-8.47	-8.47	-16.41	0.01 KWD	0.72	0.00
Utilities	457.89	0.00	0.00	-1.70	-1.70	-7.45	0.19 KWD	1.64	13.23



What Move the GCC markets

Oil Prices

Oil prices rose on Thursday, paring earlier losses that were fueled by U.S. recession fear and increased Russian oil exports dulling the impact of OPEC production cuts. Brent crude was trading at \$78.04 a barrel.

Kuwait Market

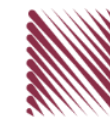
The market closed up today by + 0.04% at 7,158.55 value traded 39.9 million KD, Premier market value traded reached 35.1 million KD up by + 0.07% at 7,941.35.

KSA Market

The market closed up today by + 0.37 % at 11,307.22

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



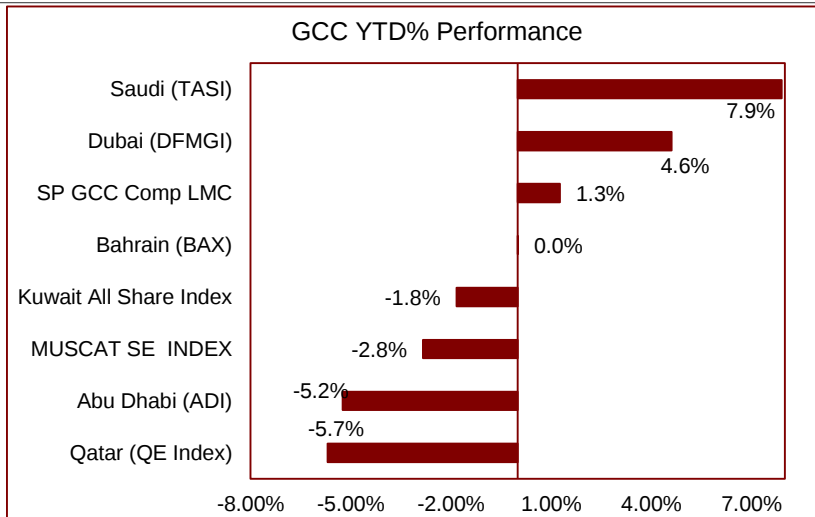
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.005	1.01	1.01	-0.07	-0.07	-2.11	7.97 KWD	2.02	27.00
KFH	0.745	0.00	0.00	-0.79	-0.79	-0.43	11.00 KWD	1.86	32.00
Zain	0.563	-0.35	-0.35	4.26	4.26	0.00	2.44 KWD	1.98	12.43
BOUBYAN BANK	0.676	-2.17	-2.17	11.44	11.44	-10.21	2.68 KWD	3.02	34.00
Agility	0.615	0.00	0.00	-0.97	-0.97	-14.58	1.65 KWD	0.98	23.69
Saudi Arabia									
ARAMCO	36.00	0.00	3.90	11.46	11.46	12.15	7,920.84 SAR	5.46	13.55
SABIC	93.80	-0.21	1.96	3.88	3.88	4.92	281.43 SAR	1.51	35.00
STC	43.90	0.92	3.17	9.61	9.61	19.95	219.52 SAR	2.98	17.84
AL-RAJHI BANK	78.10	1.30	2.09	6.26	6.26	3.86	312.43 SAR	3.12	19.77
NCB	49.25	-1.50	-2.28	7.42	7.42	-2.48	220.57 SAR	1.32	12.20
United Arab Emirates									
ETISALAT.AD	23.96	0.42	2.48	8.61	8.61	4.81	206.60 AED	5.10	21.10
FAB.AD	13.44	0.15	0.75	4.35	4.35	-21.40	148.48 AED	1.29	11.38
EMIRATES NBD	13.40	0.75	1.52	1.90	1.90	3.08	84.64 AED	0.91	6.77
DB ISLAMIC BK	5.36	0.75	0.75	2.49	2.49	-5.96	38.81 AED	0.96	7.45
EMAAR PROPERT	5.85	-2.50	-2.50	4.46	4.46	-0.17	51.71 AED	0.75	7.03
Qatar									
QNB	15.33	1.66	1.66	-4.60	-4.60	-14.83	141.59 QAR	1.39	10.12
INDUSTRIES QAT	12.50	1.38	1.38	-3.85	-3.85	-2.42	75.63 QAR	1.80	8.58
QA ISLAMIC BK	17.98	3.04	3.04	1.12	1.12	-3.12	42.49 QAR	1.59	10.98
MASRAF AL RAYA	2.55	-0.58	-0.58	-13.57	-13.57	-19.46	23.75 QAR	1.01	19.42
MESAIEED PETRO	1.98	0.41	0.41	3.13	3.13	-6.91	24.88 QAR	1.43	14.07
OMAN									
BANK MUSCAT	0.272	0.00	0.00	-1.09	-1.09	-1.09	2.04 OMR	0.91	8.33
OMANTEL	1.005	13.18	-1.47	-8.64	-8.64	9.24	0.75 OMR	1.19	7.69
BANK DHOFAR	0.155	0.00	0.00	-3.12	-3.12	-11.43	0.46 QAR	0.65	14.93
NAT BANK OF OMAN	0.275	-2.48	-2.48	2.61	2.61	-4.84	0.45 QAR	0.70	12.71
OMINVEST	0.422	0.00	0.00	-14.92	-14.92	0.48	0.28 QAR	0.79	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
12-April 23	24.87%	16.21%	0.06%	1.38%	0.41%	4.65%	17.70%	14.35%	6.12%	5.06%
19-April 23	24.85%	16.25%	0.06%	1.38%	0.42%	4.67%	17.70%	14.29%	6.13%	5.07%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.04 %The leading sector best performance indices today are Consumer Disc 1.43 % Basic materials 1.01 % Real estate 0.71 % respectively

KSA

Saudi Armco flat performance today 0 %, SABIC have negative performance today by -0.2 %. STC has a positive performance today by + 0.92 %, Al Rajhi Bank has a positive performance today by + 1.3 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.42 %, FAB.AD has a positive performance today by + 0.15 %



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