



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, January 26th 2023



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



Market Watch

Thursday, January 26, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,821.65	0.12	1.31	3.28	3.28	3.28	10,153 SAR	1.75	15.84
Qatar (QE Index)	11,110.16	-0.46	2.77	4.02	4.02	4.02	569 QAR	1.41	12.55
Dubai (DFMGI)	3,329.19	0.02	0.13	0.64	0.64	0.64	480 AED	1.19	12.77
Abu Dhabi (ADI)	9,737.59	-1.73	-1.88	-2.06	-2.06	-2.06	1,435 AED	1.95	19.65
Bahrain (BAX)	1,927.63	0.03	0.02	1.71	1.71	1.71	20 BHD	1.66	15.08
MUSCAT SE INDEX	4,751.49	0.10	-0.98	-2.18	-2.18	-2.18	5 OMR	0.94	13.25
SP GCC Comp LMC	181.97	-0.30	1.11	2.35	2.35	2.35			
SP UAE PRICE INDEX	132.94	-1.69	-1.47	-0.36	-0.36	-0.36			

Developed Markets

MSCI World Index	2,785.84	0.76	3.44	6.72	6.72	6.72			
U.S. (S&P 500)	4,070.56	1.10	4.14	5.75	5.75	5.75			
U.K. (FTSE 100)	7,765.15	0.21	0.18	4.15	4.15	4.15			
Japan (Topix)	1,982.66	-0.12	3.28	4.58	4.58	4.58			

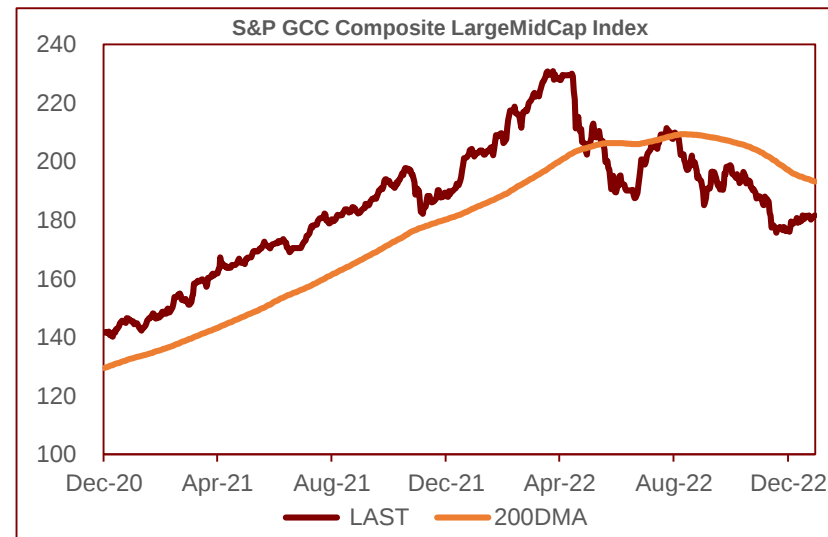
Emerging Markets

MSCI EM Index	1,051.19	1.08	2.39	10.05	10.05	10.05			
China (SSE Composite)	3,264.81	0.00	0.76	5.68	5.68	5.68			
India (Sensex)	59,330.90	0.00	-1.07	-1.04	-1.04	-1.04			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,311.43	-0.37	0.75	0.26	0.26	0.26	47.30 KWD	2.13	29.16
Kuwait Premier Index	8,113.10	-0.48	0.69	-0.03	-0.03	-0.03	37.13 KWD	2.26	24.63
Kuwait Main Index	5,678.08	0.05	1.01	1.45	1.45	1.45	10.17 KWD	1.67	45.81
NIC 50	9,101.52	-0.47	0.68	-0.04	-0.04	6.79	28.60 KWD	2.24	23.63

Kuwait Sector

Banking	1,818.26	-0.47	0.64	1.36	1.36	1.36	30.62 KWD	1.39	25.63
Telecom	1,220.22	-0.35	0.62	3.28	3.28	3.28	3.74 KWD	2.02	12.01
Industrials	984.02	-0.33	1.68	-8.79	-8.79	-8.79	3.47 KWD	0.78	18.25
Financial services	1,266.73	-0.06	0.61	0.75	0.75	0.75	3.60 KWD	0.73	16.65
Real estate	1,184.27	-0.10	0.74	-2.02	-2.02	-2.02	2.58 KWD	0.59	23.91
Basic materials	860.67	-0.11	2.04	-0.51	-0.51	-0.51	0.77 KWD	1.28	8.33
Health care	443.69	0.00	0.00	-3.93	-3.93	-3.93	0.22 KWD	2.47	11.92
Consumer services	495.01	-0.76	0.34	3.14	3.14	3.14	0.72 KWD	0.95	11.49
Insurance	1,564.01	-0.02	0.91	0.85	0.85	0.85	0.64 KWD	0.82	9.50
Consumer Disc	1,410.94	-0.16	1.17	-5.10	-5.10	-5.10	0.15 KWD	0.98	0.00
Energy	1,149.14	1.32	3.13	0.93	0.93	0.93	0.24 KWD	0.80	5.22
Technology	691.12	-4.04	-5.66	-0.73	-0.73	-0.73	0.01 KWD	0.85	0.00
Utilities	478.95	0.00	0.55	-3.19	-3.19	-3.19	0.20 KWD	1.69	14.97



What Move the GCC markets

Oil Prices

Oil prices rose 1% on Thursday on expectations that demand will strengthen as top oil importer China reopens its economy and on news U.S. crude inventories have risen less than expected. Brent crude futures rose 78 cents, or 0.9%, to \$86.90 a barrel

Kuwait Market

The market closed down today by - 0.37% at 7,311.43 value traded 35.3 million KD, Premier market value traded reached 25.0 million KD down by - 0.48% at 8,113.10.

KSA Market

The market closed up today by + 0.12% at 10,821.65.

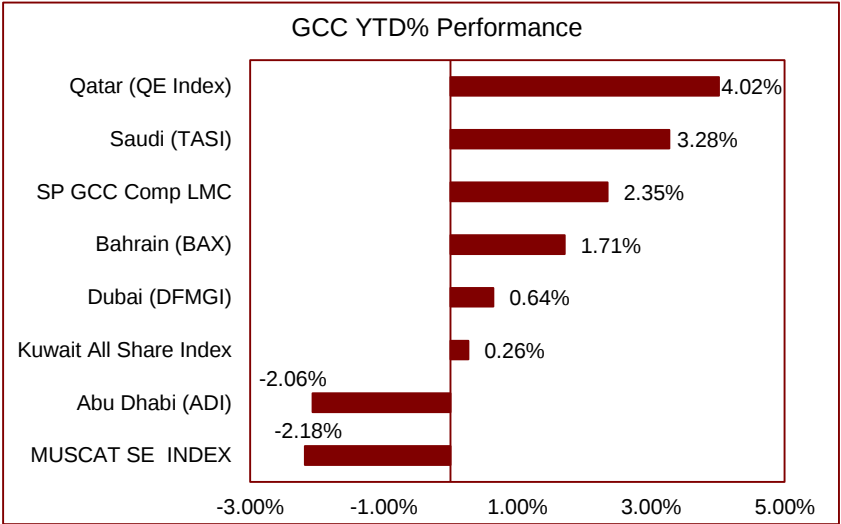


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.101	-1.26	0.09	2.13	2.13	2.13	8.32 KWD	2.12	27.00
KFH	0.833	-0.12	1.59	1.22	1.22	1.22	11.19 KWD	3.44	32.00
Zain	0.561	-0.36	0.18	-0.36	-0.36	-0.36	2.43 KWD	2.02	12.01
BOUBYAN BANK	0.802	-0.74	-0.87	0.50	0.50	0.50	3.00 KWD	3.18	34.00
Agility	0.594	-0.67	1.71	-17.50	-17.50	-17.50	1.59 KWD	1.10	38.82
Saudi Arabia									
ARAMCO	32.90	-0.60	2.17	2.49	2.49	2.49	7,237.23 SAR	5.21	12.65
SABIC	95.40	-2.05	0.95	6.71	6.71	6.71	286.17 SAR	1.56	35.00
STC	37.45	0.00	-0.13	2.32	2.32	2.32	187.23 SAR	2.55	15.55
AL-RAJHI BANK	80.90	1.38	4.12	7.58	7.58	7.58	323.57 SAR	3.76	20.99
NCB	48.25	0.10	0.42	-4.46	-4.46	-4.46	216.04 SAR	1.32	11.62
United Arab Emirates									
ETISALAT.AD	25.56	-0.39	-0.54	11.81	11.81	11.81	206.60 AED	5.10	21.10
FAB.AD	14.28	-7.99	-9.04	-16.49	-16.49	-16.49	150.25 AED	1.31	12.10
EMIRATES NBD	13.00	0.39	2.36	0.00	0.00	0.00	81.79 AED	0.88	6.57
DB ISLAMIC BK	5.65	-0.18	0.89	-0.88	-0.88	-0.88	40.62 AED	0.98	8.09
EMAAR PROPERT	5.81	-1.02	-0.68	-0.85	-0.85	-0.85	50.55 AED	0.72	6.69
Qatar									
QNB	18.49	-0.59	5.06	2.72	2.72	2.72	170.78 QAR	1.63	12.87
INDUSTRIES QAT	13.83	-0.36	0.88	7.96	7.96	7.96	83.67 QAR	2.07	8.81
QA ISLAMIC BK	19.85	-0.75	4.47	6.95	6.95	6.95	46.90 QAR	1.72	12.29
MASRAF AL RAYA	3.07	-0.07	1.12	-3.25	-3.25	-3.25	28.53 QAR	1.18	19.20
MESAIEED PETRO	2.23	-0.54	2.58	4.65	4.65	4.65	27.97 QAR	1.63	14.76
OMAN									
BANK MUSCAT	0.275	0.73	-1.43	0.00	0.00	0.00	2.06 OMR	0.95	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	0.00	-5.88	-8.57	-8.57	-8.57	0.48 QAR	0.68	14.93
NAT BANK OF OMAN	0.290	1.05	1.75	0.35	0.35	0.35	0.47 QAR	0.81	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
18-Jan 23	24.67%	17.07%	0.06%	1.33%	0.37%	4.50%	17.67%	12.29%	5.86%	5.16%
25-Jan 23	24.69%	16.88%	0.06%	1.34%	0.37%	4.74%	17.67%	15.21%	5.86%	5.17%

End of Report
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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is down today by -0.37 %The leading sector bottom performance indices today are Technology -4.04 % Consumer services -0.76 % Banking -0.47 % respectively

KSA
Saudi Armco has a negative performance today by -0.6 %, SABIC has a negative performance today by -2.05 %, STC has a flat performance today, Al Rajhi Bank has a positive performance today by + 1.38 %

U.A.E
ETISALAT .AD has a negative performance today by -0.39 %, FAB.AD has a negative performance today by -7.99 %



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