



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, March 26th 2023

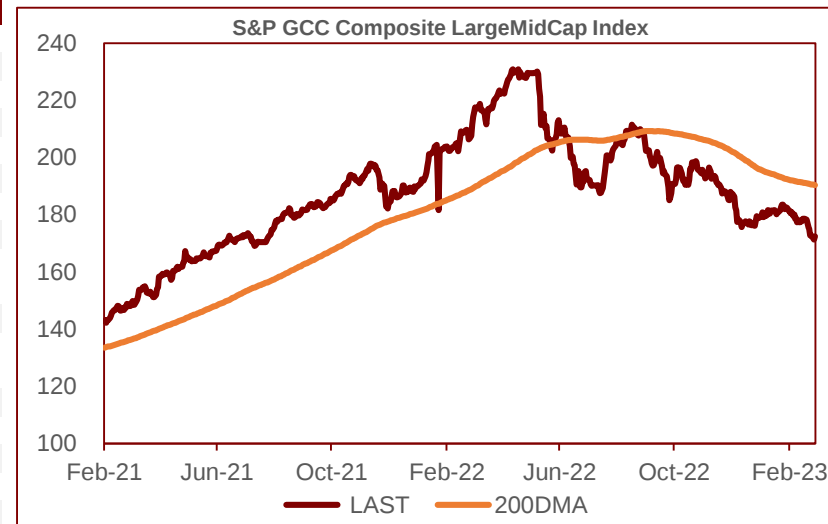




Market Watch

Sunday, March 26th 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,459.36	0.12	0.12	3.53	-0.18	-0.18	9,908 SAR	1.66	16.98
Qatar (QE Index)	10,126.18	1.20	1.20	-4.21	-5.20	-5.20	521 QAR	1.25	11.32
Dubai (DFMGI)	3,349.48	-0.43	-0.43	-2.57	0.40	0.40	486 AED	1.15	18.43
Abu Dhabi (ADI)	9,502.51	-0.50	-0.50	-3.48	-6.94	-6.94	1,435 AED	1.70	22.75
Bahrain (BAX)	1,892.59	-0.31	-0.31	-2.03	-0.14	-0.14	19 BHD	1.72	18.00
MUSCAT SE INDEX	4,844.30	-0.55	-0.55	1.91	-0.27	-0.27	5 OMR	1.02	13.25
SP GCC Comp LMC	172.88	-0.09	-0.09	0.27	-3.30	-3.30			
SP UAE PRICE INDEX	128.84	-1.19	-1.19	-5.43	-6.29	-6.29			
Developed Markets									
MSCI World Index	2,692.55	-0.16	-0.16	-0.81	3.45	3.45			
U.S. (S&P 500)	3,970.99	0.56	0.56	0.02	3.42	3.42			
U.K. (FTSE 100)	7,405.45	-1.26	-1.26	-5.98	-0.62	-0.62			
Japan (Topix)	1,955.32	-0.10	-0.10	-1.90	3.36	3.36			
Emerging Markets									
MSCI EM Index	972.18	-0.57	-0.57	0.85	1.65	1.65			
China (SSE Composite)	3,265.65	-0.64	-0.64	-0.43	5.71	5.71			
India (Sensex)	57,527.10	-0.69	-0.69	-2.43	-5.45	-5.45			
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,028.91	-0.31	-0.31	-2.97	-3.61	-3.61	45.50 KWD	1.67	25.69
Kuwait Premier Index	7,786.10	-0.34	-0.34	-3.52	-4.06	-4.06	35.58 KWD	1.65	22.20
Kuwait Main Index	5,519.27	-0.21	-0.21	-0.53	-1.39	-1.39	9.92 KWD	1.69	38.28
NIC 50	8,710.17	-0.31	-0.35	-3.53	-4.07	-4.11	28.60 KWD	1.63	21.20
Kuwait Sector									
Banking	1,746.70	-0.23	-0.23	-3.49	-2.63	-2.63	29.43 KWD	1.24	23.20
Telecom	1,140.95	-0.77	-0.77	-2.60	-3.43	-3.43	3.50 KWD	1.94	11.51
Industrials	979.38	-0.20	-0.20	-1.12	-9.22	-9.22	3.45 KWD	0.77	14.14
Financial services	1,183.35	-0.90	-0.90	-4.27	-5.88	-5.88	3.41 KWD	0.68	18.71
Real estate	1,084.90	-0.46	-0.46	-5.00	-10.24	-10.24	2.36 KWD	0.52	16.41
Basic materials	839.81	0.66	0.66	-0.51	-2.92	-2.92	0.75 KWD	1.33	7.76
Health care	455.49	0.00	0.00	-0.99	-1.38	-1.38	0.23 KWD	2.48	10.05
Consumer services	454.55	-1.34	-1.34	-5.02	-5.29	-5.29	0.73 KWD	0.84	11.28
Insurance	1,891.04	-0.13	-0.13	16.19	21.94	21.94	0.78 KWD	0.80	10.16
Consumer Disc	1,465.43	0.01	0.01	0.61	-1.44	-1.44	0.14 KWD	0.92	0.00
Energy	1,023.96	2.95	2.95	0.60	-10.06	-10.06	0.21 KWD	0.59	4.28
Technology	669.30	0.00	0.00	-1.18	-3.87	-3.87	0.01 KWD	0.83	0.00
Utilities	460.53	-0.57	-0.57	-3.85	-6.91	-6.91	0.19 KWD	1.65	13.31



What Move the GCC markets

Oil Prices

Oil prices fell Friday amid declining European banking shares and after U.S. Energy Secretary Jennifer Granholm said refilling the country's Strategic Petroleum Reserve (SPR) may take several years, dampening demand prospects. Brent crude fell 95 cents, or 1.3%, to \$74.96 a barrel.

Kuwait Market

The market closed down today by - 0.31% at 7,028.91 value traded 17.7 million KD, Premier market value traded reached 15.5 million KD down by - 0.34% at 7,786.10.

KSA Market

The market closed up today by + 0.12% at 10,459.36.



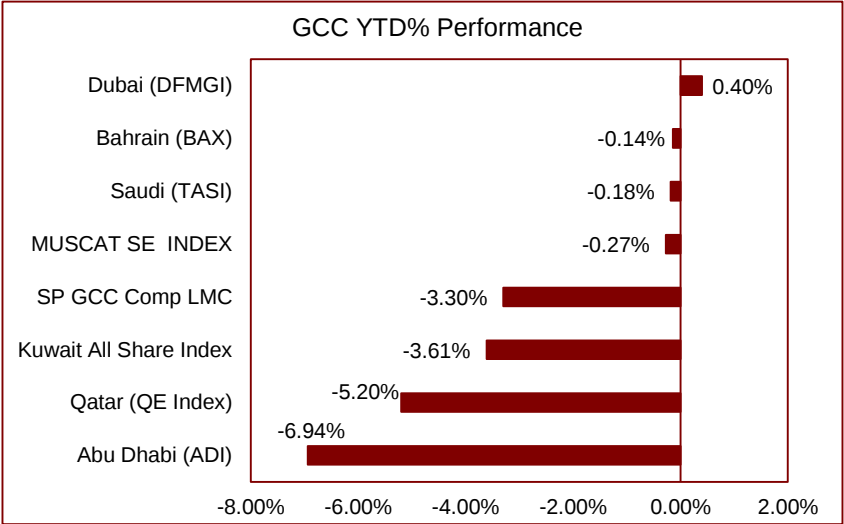
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.054	-0.57	-0.57	-1.50	-2.23	-2.23	7.96 KWD	1.96	27.00
KFH	0.825	0.12	0.12	-3.73	0.24	0.24	11.08 KWD	1.88	32.00
Zain	0.538	-0.37	-0.37	-3.76	-4.44	-4.44	2.33 KWD	1.94	11.51
BOUBYAN BANK	0.645	-0.92	-0.92	-15.69	-19.17	-19.17	2.41 KWD	2.54	34.00
Agility	0.611	-0.33	-0.33	1.33	-15.14	-15.14	1.64 KWD	1.13	39.93
Saudi Arabia									
ARAMCO	32.15	0.00	0.00	1.10	0.16	0.16	7,073.00 SAR	4.88	12.10
SABIC	90.30	0.00	0.00	2.03	1.01	1.01	270.90 SAR	1.46	35.00
STC	40.00	2.56	2.56	13.80	9.29	9.29	200.00 SAR	2.71	16.00
AL-RAJHI BANK	73.60	0.14	0.14	4.69	-2.13	-2.13	294.40 SAR	2.94	18.85
NCB	45.60	-1.83	-1.83	-3.49	-9.70	-9.70	204.20 SAR	1.22	11.34
United Arab Emirates									
ETISALAT.AD	23.70	-0.25	-0.25	-7.06	3.67	3.67	206.60 AED	5.10	21.10
FAB.AD	13.00	-3.13	-3.13	-7.67	-23.98	-23.98	143.62 AED	1.25	11.01
EMIRATES NBD	12.90	0.39	0.39	-5.15	-0.77	-0.77	81.48 AED	0.87	6.52
DB ISLAMIC BK	5.21	-5.62	-5.62	-9.23	-8.60	-8.60	37.72 AED	0.91	7.46
EMAAR PROPERT	5.43	-1.63	-1.63	-3.04	-7.34	-7.34	47.99 AED	0.70	6.52
Qatar									
QNB	16.40	3.08	3.08	-2.67	-8.89	-8.89	152.29 QAR	1.44	11.41
INDUSTRIES QAT	12.90	-0.39	-0.39	-7.33	0.70	0.70	78.46 QAR	1.86	8.85
QA ISLAMIC BK	18.12	2.66	2.66	-2.58	-2.37	-2.37	43.05 QAR	1.57	11.22
MASRAF AL RAYA	2.59	-0.61	-0.61	-3.96	-18.23	-18.23	24.24 QAR	1.00	16.45
MESAIEED PETRO	1.96	0.93	0.93	-6.81	-7.95	-7.95	24.73 QAR	1.41	13.92
OMAN									
BANK MUSCAT	0.273	-0.73	-0.73	-6.51	-0.73	-0.73	2.05 OMR	0.92	8.33
OMANTEL	1.080	21.62	-0.46	12.50	17.39	17.39	0.81 OMR	1.27	7.69
BANK DHOFAR	0.155	0.00	0.00	1.97	-11.43	-11.43	0.46 QAR	0.65	14.93
NAT BANK OF OMAN	0.270	0.00	0.00	1.50	-6.57	-6.57	0.44 QAR	0.69	12.71
OMINVEST	0.500	0.00	0.00	9.65	19.05	19.05	0.33 QAR	0.94	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
15-March 23	24.85%	16.58%	0.06%	1.36%	0.41%	4.72%	17.70%	15.03%	5.84%	5.25%
22-March 23	24.76%	16.45%	0.06%	1.37%	0.41%	4.63%	17.70%	14.43%	5.81%	5.10%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.31 %The leading sector bottom performance indices today are Consumer services -1.34 % Financial services -0.9 % Telecom -0.77 % respectively

KSA

Saudi Armco flat performance today, SABIC flat performance today, STC has a positive performance today by + 2.56 %, Al Rajhi Bank has a positive performance today by + 0.14 %

U.A.E

ETISALAT .AD has a negative performance today by -0.25 %, FAB.AD has a negative performance today by -3.13 %



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