



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday , April 27th 2023





Market Watch

Thursday, April 27, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,271.19	-0.32	2.80	6.43	6.43	7.57	10,957 SAR	1.84	18.58
Qatar (QE Index)	10,145.38	0.72	0.55	-0.66	-0.66	-5.02	534 QAR	1.31	10.83
Dubai (DFMGI)	3,544.79	0.75	0.82	3.21	3.21	5.39	510 AED	1.23	23.30
Abu Dhabi (ADI)	9,789.17	0.77	2.02	3.40	3.40	-4.51	1,435 AED	1.76	20.77
Bahrain (BAX)	1,894.52	-0.05	0.69	0.42	0.42	-0.04	20 BHD	1.62	18.00
MUSCAT SE INDEX	4,734.51	0.32	-1.59	-2.64	-2.64	-2.53	5 OMR	1.03	13.25
SP GCC Comp LMC	181.35	0.02	1.90	4.26	4.26	1.28			
SP UAE PRICE INDEX	137.48	1.42	3.00	6.57	6.57	-0.81			

Developed Markets

MSCI World Index	2,835.93	1.30	-0.47	0.87	0.87	8.19			
U.S. (S&P 500)	4,169.48	1.96	-0.26	0.63	0.63	7.71			
U.K. (FTSE 100)	7,870.57	-0.27	-0.15	2.62	2.62	5.10			
Japan (Topix)	2,057.48	0.43	1.22	1.45	1.45	7.44			

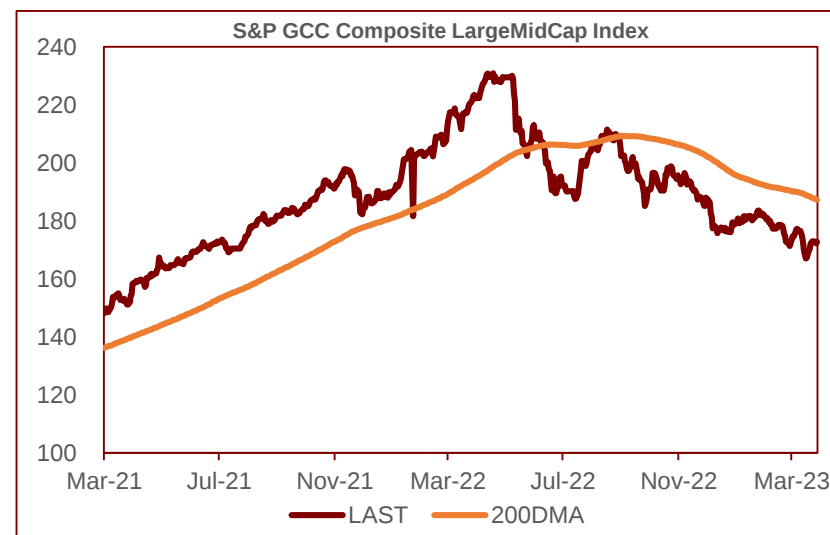
Emerging Markets

MSCI EM Index	977.05	0.45	-2.49	-1.83	-1.83	1.65			
China (SSE Composite)	3,323.27	0.67	-0.98	0.40	0.40	6.36			
India (Sensex)	61,112.44	0.58	0.36	2.81	2.81	-0.31			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,162.54	0.06	2.47	1.59	1.59	-1.78	46.36 KWD	1.69	21.80
Kuwait Premier Index	7,939.94	-0.02	2.34	1.51	1.51	-2.17	36.27 KWD	1.71	21.97
Kuwait Main Index	5,606.14	0.38	3.05	1.92	1.92	0.17	10.09 KWD	1.59	21.23
NIC 50	9,020.16	-6.05	2.33	1.50	1.50	-0.70	28.60 KWD	1.69	20.97

Kuwait Sector

Banking	1,762.27	-0.04	2.14	0.54	0.54	-1.76	29.67 KWD	1.30	22.97
Telecom	1,184.12	0.73	4.24	4.58	4.58	0.23	3.63 KWD	2.00	9.60
Industrials	1,003.51	0.32	2.65	1.68	1.68	-6.99	3.53 KWD	0.80	17.83
Financial services	1,229.70	-0.31	1.51	2.82	2.82	-2.19	3.58 KWD	0.73	21.93
Real estate	1,142.08	0.17	2.17	5.73	5.73	-5.51	2.47 KWD	0.53	14.47
Basic materials	892.56	0.15	6.62	4.13	4.13	3.17	0.78 KWD	1.61	8.30
Health care	462.45	0.00	0.00	1.53	1.53	0.13	0.23 KWD	1.06	10.54
Consumer services	460.72	2.05	2.67	3.47	3.47	-4.01	0.74 KWD	0.85	13.76
Insurance	2,110.47	-0.30	11.29	10.50	10.50	36.09	0.86 KWD	0.77	10.16
Consumer Disc	1,465.78	0.64	2.59	0.26	0.26	-1.42	0.14 KWD	0.93	0.00
Energy	998.70	0.25	0.05	0.08	0.08	-12.28	0.21 KWD	0.67	4.49
Technology	582.00	0.00	-6.65	-8.47	-8.47	-16.41	0.01 KWD	0.72	0.00
Utilities	460.53	0.58	-0.57	-1.13	-1.13	-6.91	0.19 KWD	1.65	13.31



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 + 0.06% at 7,162.54 value traded 27.6 million KD, Premier market value traded reached 22.3 million KD down by - 0.02% at 7,939.94.

KSA Market

The market closed down today by - 0.32 % at 11,271.19

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



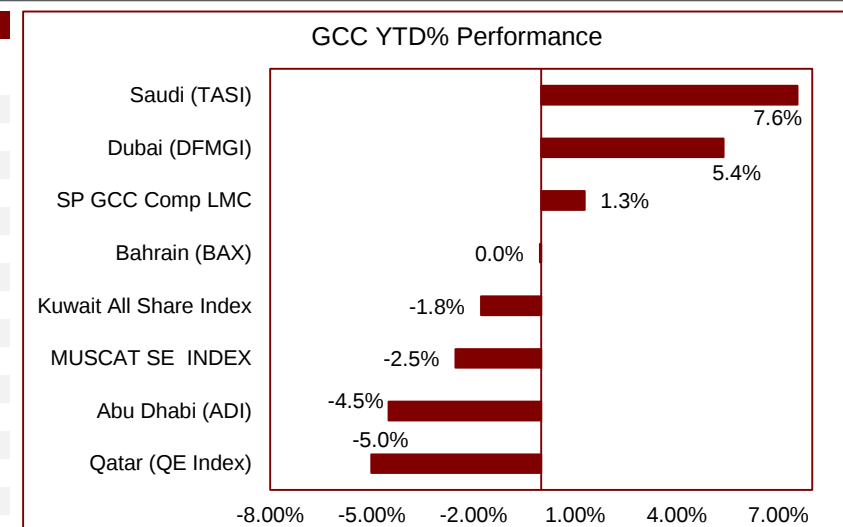
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.003	-0.20	4.15	-0.27	-0.27	-2.31	7.95 KWD	2.01	27.00
KFH	0.744	-0.13	0.54	-0.92	-0.92	-0.56	10.98 KWD	1.86	32.00
Zain	0.569	1.07	3.45	5.37	5.37	1.07	2.46 KWD	2.00	12.56
BOUBYAN BANK	0.674	-0.30	6.98	11.11	11.11	-10.47	2.67 KWD	3.01	34.00
Agility	0.616	0.16	3.01	-0.81	-0.81	-14.44	1.65 KWD	0.98	23.73
Saudi Arabia									
ARAMCO	36.00	0.00	9.59	11.46	11.46	12.15	7,919.37 SAR	5.46	13.55
SABIC	92.30	-1.60	1.21	2.21	2.21	3.24	276.88 SAR	1.49	35.00
STC	45.00	2.51	5.88	12.36	12.36	22.95	224.98 SAR	3.05	18.01
AL-RAJHI BANK	76.80	-1.66	1.59	4.49	4.49	2.13	307.18 SAR	3.07	18.40
NCB	48.90	-0.71	-1.71	6.65	6.65	-3.17	218.96 SAR	1.31	12.02
United Arab Emirates									
ETISALAT.AD	24.20	1.00	3.24	9.70	9.70	5.86	206.60 AED	5.10	21.10
FAB.AD	13.88	3.27	5.47	7.76	7.76	-18.83	156.65 AED	1.40	11.76
EMIRATES NBD	13.90	3.73	6.92	5.70	5.70	6.92	89.06 AED	0.93	7.02
DB ISLAMIC BK	5.40	0.75	1.69	3.25	3.25	-5.26	40.26 AED	1.00	7.51
EMAAR PROPERT	5.91	1.03	-1.01	5.54	5.54	0.85	52.41 AED	0.76	7.10
Qatar									
QNB	15.36	0.20	-0.90	-4.42	-4.42	-14.67	141.87 QAR	1.40	10.14
INDUSTRIES QAT	12.76	2.08	-2.15	-1.85	-1.85	-0.39	77.20 QAR	1.84	8.76
QA ISLAMIC BK	17.90	-0.44	0.73	0.67	0.67	-3.56	42.30 QAR	1.59	10.94
MASRAF AL RAYA	2.55	-0.16	-5.35	-13.71	-13.71	-19.58	23.72 QAR	1.01	19.39
MESAIEED PETRO	1.98	0.00	0.66	3.13	3.13	-6.91	24.88 QAR	1.43	14.07
OMAN									
BANK MUSCAT	0.271	-0.37	-1.45	-1.45	-1.45	-1.45	2.03 OMR	0.91	8.33
OMANTEL	1.000	12.61	-1.48	-9.09	-9.09	8.70	0.75 OMR	1.18	7.69
BANK DHOFAR	0.155	0.00	-3.12	-3.12	-3.12	-11.43	0.46 QAR	0.65	14.93
NAT BANK OF OMAN	0.275	0.00	-3.17	2.61	2.61	-4.84	0.45 QAR	0.70	12.71
OMINVEST	0.422	0.00	1.44	-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
19-April 23	24.85%	16.25%	0.06%	1.38%	0.42%	4.67%	17.70%	14.29%	6.13%	5.07%
26-April 23	24.86%	16.22%	0.06%	1.38%	0.43%	4.66%	17.70%	14.24%	6.14%	5.07%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.06 %The leading sector best performance indices today are Consumer services 2.05 % Telecom 0.73 % Consumer Disc 0.64 % respectively

KSA

Saudi Armco has a flat performance today, SABIC has a negative performance today by - 1.60 %, STC has a positive performance today by + 2.51 %, Al Rajhi Bank has a negative performance today by -1.66 %

U.A.E

ETISALAT .AD has a positive performance today by + 1 %, FAB.AD has a positive performance today by + 3.27 %



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