



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, February 28th 2023





Market Watch Tuesday, February 28, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,102.70	1.08	-0.50	-6.39	-3.59	-3.59	9,721 SAR	1.63	14.19
Qatar (QE Index)	10,571.00	0.31	0.95	-3.30	-1.03	-1.03	538 QAR	1.33	11.62
Dubai (DFMGI)	3,437.76	0.58	0.76	4.07	3.05	3.05	495 AED	1.19	19.07
Abu Dhabi (ADI)	9,844.81	0.12	0.00	0.34	-3.59	-3.59	1,435 AED	1.89	22.76
Bahrain (BAX)	1,931.83	-0.37	-0.38	0.19	1.93	1.93	20 BHD	1.74	15.69
MUSCAT SE INDEX	4,753.28	1.90	2.22	1.06	-2.14	-2.14	5 OMR	0.95	13.25
SP GCC Comp LMC	172.42	0.66	-0.17	-4.96	-3.55	-3.55			
SP UAE PRICE INDEX	136.25	0.74	0.72	1.76	-0.91	-0.91			

Developed Markets

MSCI World Index	2,714.57	-0.26	-0.83	-2.53	4.30	4.30			
U.S. (S&P 500)	3,970.15	-0.30	-1.05	-2.61	3.40	3.40			
U.K. (FTSE 100)	7,876.28	-0.74	-0.40	1.35	5.70	5.70			
Japan (Topix)	1,996.53	0.03	0.91	0.91	5.37	5.37			

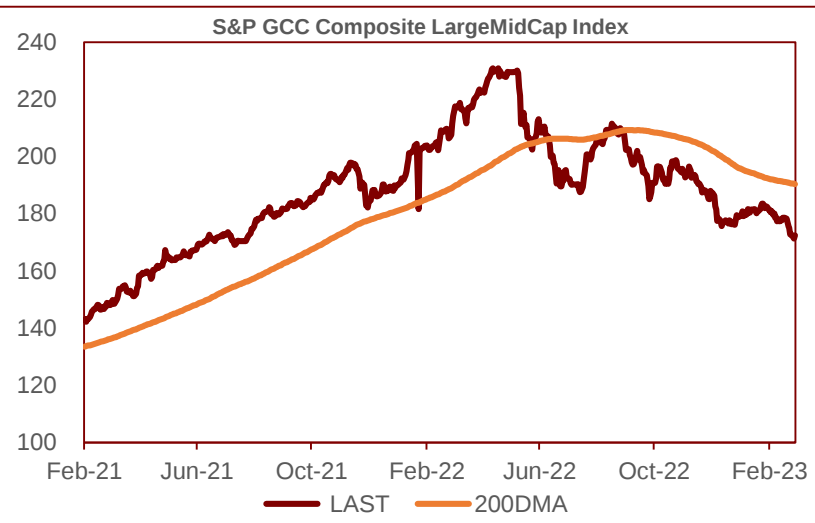
Emerging Markets

MSCI EM Index	964.01	-0.33	-2.40	-6.54	0.80	0.80			
China (SSE Composite)	3,314.92	0.66	-0.24	0.74	6.16	6.16			
India (Sensex)	59,320.00	-0.55	-1.08	-0.99	-3.09	-3.09			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,244.43	-0.31	-0.31	-0.45	-0.65	-0.65	46.86 KWD	1.74	27.74
Kuwait Premier Index	8,069.77	-0.44	-0.44	-0.19	-0.57	-0.57	36.90 KWD	1.75	23.27
Kuwait Main Index	5,548.70	0.30	0.30	-1.33	-0.86	-0.86	9.97 KWD	1.66	44.37
NIC 50	9,022.41	-0.40	-0.45	-0.20	-0.58	-0.68	28.60 KWD	1.73	22.27

Kuwait Sector

Banking	1,809.87	-0.58	-0.58	-0.19	0.89	0.89	30.48 KWD	1.29	24.27
Telecom	1,171.44	0.88	0.88	-2.19	-0.85	-0.85	3.59 KWD	2.01	11.96
Industrials	990.43	0.47	0.47	1.08	-8.20	-8.20	3.48 KWD	0.79	18.33
Financial services	1,236.10	-0.34	-0.34	-1.41	-1.68	-1.68	3.53 KWD	0.66	17.64
Real estate	1,142.03	0.58	0.58	-3.94	-5.52	-5.52	2.48 KWD	0.55	22.46
Basic materials	844.10	-1.32	-1.32	-2.20	-2.43	-2.43	0.76 KWD	1.28	8.15
Health care	460.03	0.00	0.00	3.68	-0.39	-0.39	0.23 KWD	2.46	13.39
Consumer services	478.57	-0.64	-0.64	-0.21	-0.29	-0.29	0.73 KWD	0.93	11.88
Insurance	1,627.56	-0.19	-0.19	4.75	4.95	4.95	0.67 KWD	0.82	10.09
Consumer Disc	1,456.51	-0.02	-0.02	3.76	-2.04	-2.04	0.15 KWD	0.96	0.00
Energy	1,017.84	-2.19	-2.19	-7.34	-10.60	-10.60	0.21 KWD	0.56	4.57
Technology	677.30	0.00	0.00	-2.62	-2.72	-2.72	0.01 KWD	0.83	0.00
Utilities	478.95	-0.55	-0.55	0.00	-3.19	-3.19	0.20 KWD	1.69	14.97



What Move the GCC markets

Oil Prices

Oil prices rose Tuesday, supported by hopes a solid economic rebound in China will drive up fuel demand, offsetting worries about further U.S. interest rate hikes dragging on consumption in the world's biggest economy. Brent crude futures for April, due to expire on Tuesday, were up by 87 cents to \$83.32 per barrel.

Kuwait Market

The market closed down today by – 0.31% at 7,244.43 value traded 60.4 million KD, Premier market value traded reached 35.3 million KD down by – 0.44% at 8,069.77.

KSA Market

The market closed up today by + 1.08% at 10,102.70.

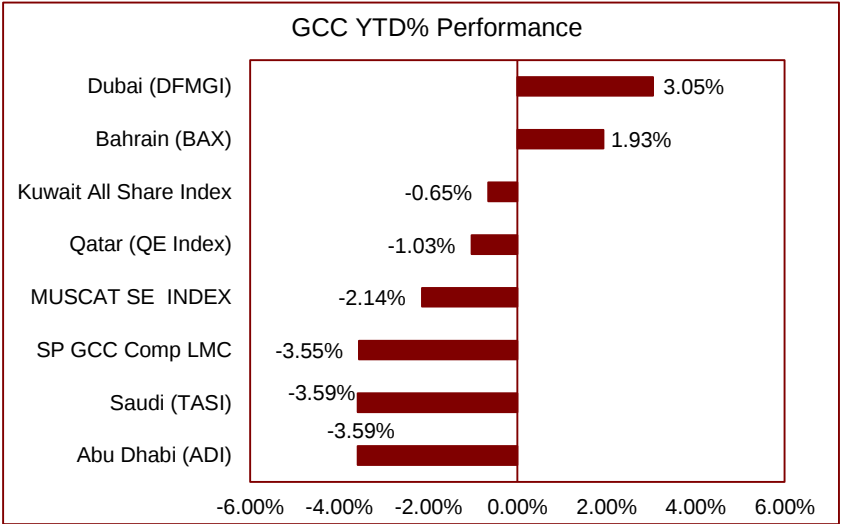


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.070	-0.65	-0.65	-2.46	-0.74	-0.74	8.08 KWD	1.99	27.00
KFH	0.857	-1.27	-1.27	2.51	4.13	4.13	11.50 KWD	1.95	32.00
Zain	0.559	1.08	1.08	0.90	-0.71	-0.71	2.42 KWD	2.01	11.96
BOUBYAN BANK	0.765	0.92	0.92	-2.42	-4.14	-4.14	2.86 KWD	3.01	34.00
Agility	0.603	1.69	1.69	2.03	-16.25	-16.25	1.61 KWD	1.11	39.41
Saudi Arabia									
ARAMCO	31.80	2.58	0.00	-3.49	-0.93	-0.93	6,995.81 SAR	5.04	11.85
SABIC	88.50	-3.70	-2.64	-4.53	-1.01	-1.01	265.49 SAR	1.45	35.00
STC	35.15	2.33	1.30	-4.74	-3.96	-3.96	175.75 SAR	2.39	14.08
AL-RAJHI BANK	70.30	0.57	-2.77	-14.27	-6.52	-6.52	281.19 SAR	2.81	17.92
NCB	47.25	0.11	-1.25	-0.11	-6.44	-6.44	211.58 SAR	1.26	11.52
United Arab Emirates									
ETISALAT.AD	25.50	0.95	-0.47	-0.78	11.55	11.55	206.60 AED	5.10	21.10
FAB.AD	14.08	-0.14	-0.14	3.53	-17.66	-17.66	155.55 AED	1.35	11.93
EMIRATES NBD	13.60	1.49	1.87	5.02	4.62	4.62	85.91 AED	0.92	6.87
DB ISLAMIC BK	5.74	1.23	1.77	3.42	0.70	0.70	41.56 AED	1.00	8.22
EMAAR PROPERT	5.60	2.56	3.70	0.72	-4.44	-4.44	49.50 AED	0.70	6.75
Qatar									
QNB	16.85	1.94	4.59	-6.39	-6.39	-6.39	155.63 QAR	1.48	11.73
INDUSTRIES QAT	13.92	0.43	0.58	-0.93	8.67	8.67	84.22 QAR	2.01	9.55
QA ISLAMIC BK	18.60	0.76	1.47	-5.44	0.22	0.22	43.95 QAR	1.61	11.51
MASRAF AL RAYA	2.70	-1.75	-1.42	-1.10	-14.85	-14.85	25.11 QAR	1.04	17.13
MESAIEED PETRO	2.10	-0.80	-0.28	-2.28	-1.22	-1.22	26.40 QAR	1.52	14.93
OMAN									
BANK MUSCAT	0.292	1.74	2.46	5.80	6.18	6.18	2.19 OMR	0.98	8.33
OMANTEL	0.960	8.11	3.00	1.27	4.35	4.35	0.72 OMR	1.22	7.69
BANK DHOFAR	0.152	0.00	0.66	1.33	-13.14	-13.14	0.46 QAR	0.64	14.93
NAT BANK OF OMAN	0.266	0.00	0.76	-2.92	-7.96	-7.96	0.43 QAR	0.67	12.71
OMINVEST	0.456	9.62	8.57	9.09	8.57	8.57	0.30 QAR	0.91	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
15-Feb 23	24.78%	16.71%	0.06%	1.35%	0.40%	4.42%	17.68%	15.25%	5.85%	5.16%
22-Feb 23	24.76%	16.65%	0.06%	1.34%	0.42%	4.46%	17.71%	15.22%	5.84%	5.12%

End of Report
The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed and others authorized to receive it.

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 Energy -2.19 % Basic materials -1.32 % Consumer services -0.64 % respectively

KSA
Saudi Armco has a positive performance today by + 2.58 %, SABIC has a negative performance today by -3.69 %, STC has a positive performance today by + 2.33 %, Al Rajhi Bank has a positive performance today by + 0.57 %

U.A.E
ETISALAT .AD has a positive performance today by + 0.95 %, FAB.AD have negative performance today by -0.14 %



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

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