



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, March 28th 2023

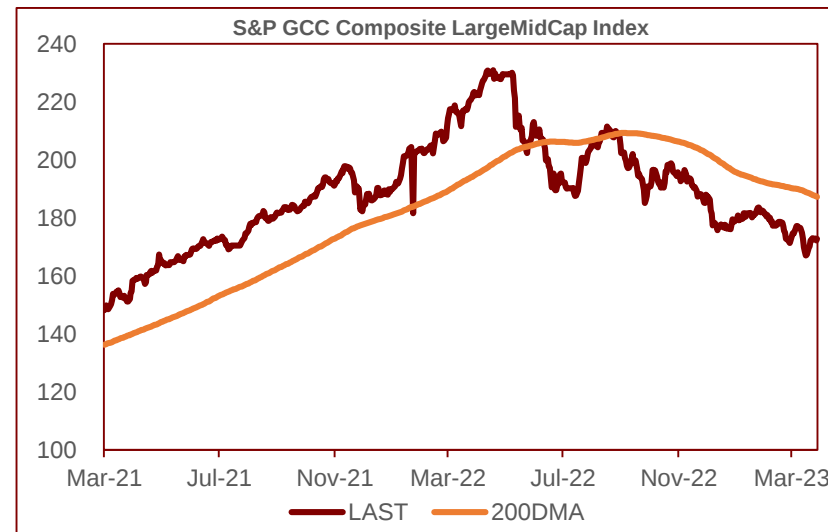




Market Watch

Tuesday, March 28th 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,468.08	0.04	0.21	3.62	-0.10	-0.10	9,899 SAR	1.66	17.60
Qatar (QE Index)	10,308.23	2.05	3.02	-2.49	-3.49	-3.49	517 QAR	1.25	11.27
Dubai (DFMGI)	3,384.41	1.74	0.61	-1.55	1.45	1.45	482 AED	1.14	18.52
Abu Dhabi (ADI)	9,457.16	0.37	-0.97	-3.94	-7.38	-7.38	1,435 AED	1.70	22.69
Bahrain (BAX)	1,879.66	0.07	-0.99	-2.70	-0.82	-0.82	19 BHD	1.72	18.00
MUSCAT SE INDEX	4,858.67	0.13	-0.25	2.22	0.03	0.03	5 OMR	1.00	13.25
SP GCC Comp LMC	172.82	0.37	-0.13	0.23	-3.33	-3.33			
SP UAE PRICE INDEX	129.07	1.34	-1.02	-5.27	-6.13	-6.13			
Developed Markets									
MSCI World Index	2,704.76	0.09	0.29	-0.36	3.92	3.92			
U.S. (S&P 500)	3,971.27	-0.16	0.57	0.03	3.43	3.43			
U.K. (FTSE 100)	7,484.25	0.17	-0.20	-4.98	0.44	0.44			
Japan (Topix)	1,966.67	0.25	0.48	-1.33	3.96	3.96			
Emerging Markets									
MSCI EM Index	970.69	0.69	-0.72	0.69	1.50	1.50			
China (SSE Composite)	3,245.38	-0.19	-1.26	-1.04	5.05	5.05			
India (Sensex)	57,613.72	-0.07	-0.54	-2.29	-5.30	-5.30			
Kuwait									
Kuwait All Share Index	7,029.38	0.21	-0.30	-2.97	-3.60	-3.60	45.40 KWD	1.65	25.70
Kuwait Premier Index	7,784.72	0.23	-0.35	-3.53	-4.08	-4.08	35.49 KWD	1.64	22.14
Kuwait Main Index	5,525.55	0.14	-0.09	-0.42	-1.27	-1.27	9.91 KWD	1.68	38.54
NIC 50	8,706.17	0.27	-0.36	-3.54	-4.09	-4.16	28.60 KWD	1.62	21.14
Kuwait Sector									
Banking	1,745.36	0.28	-0.31	-3.56	-2.71	-2.71	29.32 KWD	1.24	23.14
Telecom	1,141.44	0.44	-0.73	-2.56	-3.39	-3.39	3.49 KWD	1.88	11.79
Industrials	974.66	-0.28	-0.68	-1.59	-9.66	-9.66	3.44 KWD	0.78	14.11
Financial services	1,196.55	-0.34	0.20	-3.20	-4.83	-4.83	3.46 KWD	0.66	18.89
Real estate	1,079.86	0.00	-0.92	-5.44	-10.66	-10.66	2.35 KWD	0.52	16.48
Basic materials	840.15	0.33	0.70	-0.47	-2.89	-2.89	0.75 KWD	1.33	7.73
Health care	455.49	0.00	0.00	-0.99	-1.38	-1.38	0.23 KWD	2.48	10.05
Consumer services	445.31	-0.46	-3.34	-6.95	-7.22	-7.22	0.73 KWD	0.84	11.26
Insurance	1,912.11	1.07	0.98	17.48	23.30	23.30	0.78 KWD	0.80	10.16
Consumer Disc	1,471.90	0.88	0.45	1.06	-1.00	-1.00	0.14 KWD	0.91	0.00
Energy	1,022.97	0.73	2.85	0.50	-10.15	-10.15	0.21 KWD	0.59	4.28
Technology	640.20	-4.35	-4.35	-5.48	-8.05	-8.05	0.01 KWD	0.83	0.00
Utilities	460.53	1.16	-0.57	-3.85	-6.91	-6.91	0.19 KWD	1.63	13.16



What Move the GCC markets

Oil Prices

Crude prices firmed on Tuesday, extending sharp gains from the previous session amid supply disruption risks from Iraqi Kurdistan and hopes that turmoil in banking is being contained, Brent crude futures gained 61 cents, 0.8%, to \$78.73 a barrel.

Kuwait Market

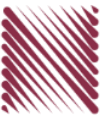
The market closed up today by + 0.21% at 7,029.38 value traded 30.0 million KD, Premier market value traded reached 26.1 million KD up by + 0.23% at 7,784.72.

KSA Market

The market closed up today by + 0.04% at 10,468.08.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



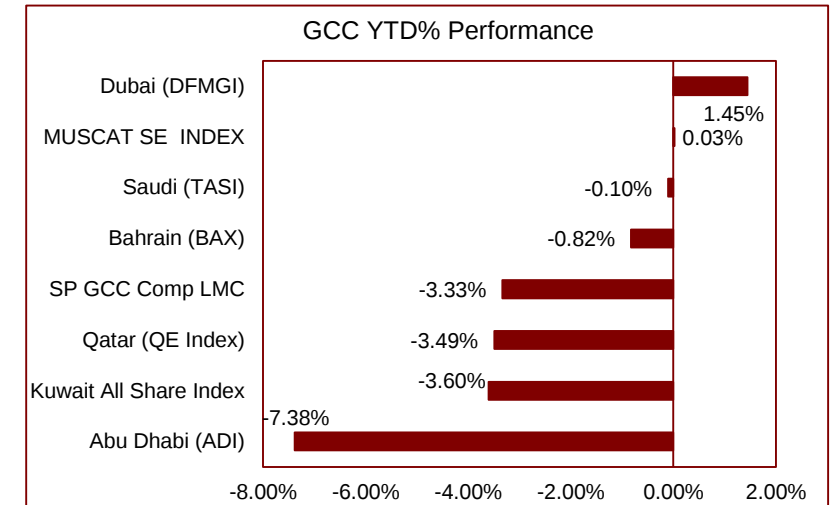
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.059	0.95	-0.09	-1.03	-1.76	-1.76	7.92 KWD	1.95	27.00
KFH	0.824	0.12	0.00	-3.85	0.12	0.12	11.05 KWD	1.87	32.00
Zain	0.538	0.75	-0.37	-3.76	-4.44	-4.44	2.31 KWD	1.88	11.79
BOUBYAN BANK	0.627	-0.63	-3.69	-18.04	-21.43	-21.43	2.36 KWD	2.49	34.00
Agility	0.612	-0.33	-0.16	1.49	-15.00	-15.00	1.64 KWD	1.14	40.13
Saudi Arabia									
ARAMCO	32.30	0.62	0.47	1.57	0.62	0.62	7,060.12 SAR	4.87	12.10
SABIC	90.00	-0.44	-0.33	1.69	0.67	0.67	271.13 SAR	1.46	35.00
STC	40.20	-0.12	3.08	14.37	9.84	9.84	201.20 SAR	2.73	16.41
AL-RAJHI BANK	72.50	-1.49	-1.36	3.13	-3.59	-3.59	294.32 SAR	2.94	18.87
NCB	44.90	-1.43	-3.34	-4.97	-11.09	-11.09	203.92 SAR	1.22	11.13
United Arab Emirates									
ETISALAT.AD	23.32	-0.43	-1.85	-8.55	2.01	2.01	206.60 AED	5.10	21.10
FAB.AD	13.08	0.93	-2.53	-7.10	-23.51	-23.51	143.17 AED	1.24	10.98
EMIRATES NBD	13.00	2.77	1.17	-4.41	0.00	0.00	79.90 AED	0.86	6.39
DB ISLAMIC BK	5.35	4.90	-3.08	-6.79	-6.14	-6.14	36.93 AED	0.89	7.30
EMAAR PROPERT	5.65	4.82	2.36	0.89	-3.58	-3.58	47.64 AED	0.69	6.47
Qatar									
QNB	16.40	1.23	3.08	-2.67	-8.89	-8.89	150.09 QAR	1.42	11.27
INDUSTRIES QAT	13.17	2.89	1.70	-5.39	2.81	2.81	77.68 QAR	1.84	8.79
QA ISLAMIC BK	18.50	1.59	4.82	-0.54	-0.32	-0.32	43.16 QAR	1.58	11.27
MASRAF AL RAYA	2.79	6.01	6.90	3.30	-12.05	-12.05	24.54 QAR	1.02	16.69
MESAIEED PETRO	1.99	1.99	2.78	-5.09	-6.25	-6.25	24.64 QAR	1.41	13.89
OMAN									
BANK MUSCAT	0.275	0.73	0.00	-5.82	0.00	0.00	2.05 OMR	0.92	8.33
OMANTEL	1.100	23.87	1.38	14.58	19.57	19.57	0.83 OMR	1.30	7.69
BANK DHOFAR	0.160	0.00	3.23	5.26	-8.57	-8.57	0.48 QAR	0.67	14.93
NAT BANK OF OMAN	0.268	0.00	-0.74	0.75	-7.27	-7.27	0.44 QAR	0.68	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, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.21 % The leading sector best performance indices today are Utilities 1.16 % Insurance 1.07 % Consumer Disc 0.88 % respectively

KSA

Saudi Armco has a positive performance today by + 0.62 %, SABIC has a negative performance today by -0.44 %, STC has a negative performance today by -0.12 %, Al Rajhi Bank has a negative performance today by -1.49 %

U.A.E

ETISALAT .AD has a negative performance today by -0.43 %, FAB.AD has a positive performance today by + 0.93 %



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