



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, May 28th 2023



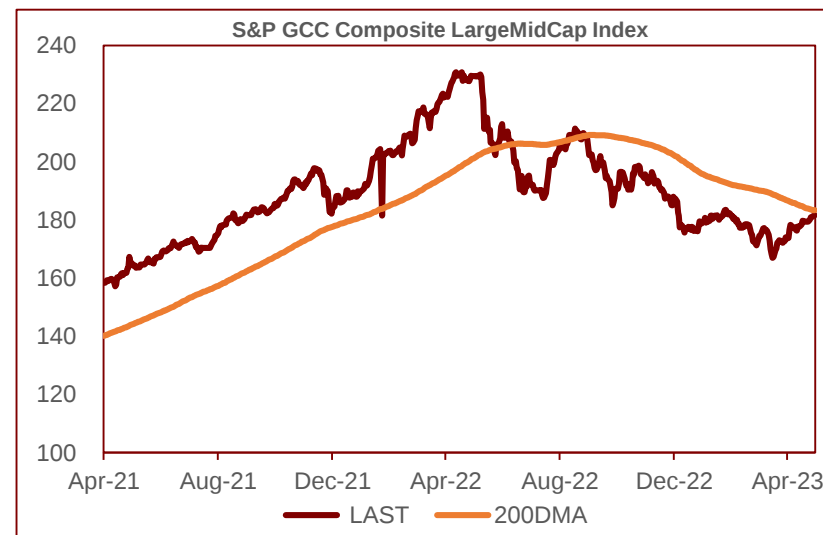


Market Watch

Sunday, May 28, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,138.05	-0.42	-1.82	-1.50	5.17	6.29	10,727 SAR	1.97	17.89
Qatar (QE Index)	10,426.32	-0.28	-2.04	2.41	2.09	-2.39	559 QAR	1.38	11.26
Dubai (DFMGI)	3,541.41	0.44	-0.40	-0.10	3.95	6.16	504 AED	1.32	16.57
Abu Dhabi (ADI)	9,453.42	0.56	-0.58	-3.43	0.25	-7.42	1,435 AED	1.78	20.51
Bahrain (BAX)	1,960.79	-0.08	0.91	2.96	3.93	3.46	20 BHD	1.65	17.62
MUSCAT SE INDEX	4,630.45	-0.24	-1.41	-1.86	-4.78	-4.67	5 OMR	0.99	13.25
SP GCC Comp LMC	176.16	-0.24	-2.17	-3.01	1.44	-1.46			
SP UAE PRICE INDEX	129.89	0.00	-1.63	-5.53	1.49	-5.54			
Developed Markets									
MSCI World Index	2,827.93	1.11	-0.43	-0.28	1.31	8.65			
U.S. (S&P 500)	4,205.45	1.30	0.18	0.86	2.34	9.53			
U.K. (FTSE 100)	7,627.20	0.74	-1.49	-3.09	-0.06	2.35			
Japan (Topix)	2,145.84	-0.01	-0.56	4.29	7.10	13.43			
Emerging Markets									
MSCI EM Index	972.86	0.92	-0.54	-0.43	-1.76	1.72			
China (SSE Composite)	3,212.50	0.35	-2.57	-3.33	-1.84	3.99			
India (Sensex)	62,501.69	1.02	1.74	2.27	5.95	2.73			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,798.47	0.50	-0.03	-4.82	-3.58	-6.77	44.10 KWD	1.64	17.48
Kuwait Premier Index	7,507.99	0.59	0.11	-5.11	-4.01	-7.49	34.32 KWD	1.59	17.16
Kuwait Main Index	5,409.59	0.09	-0.65	-3.51	-1.66	-3.34	9.78 KWD	1.81	18.63
NIC 50	8,591.12	-3.09	0.10	-5.12	-4.02	-5.42	28.60 KWD	1.57	16.16
Kuwait Sector									
Banking	1,663.46	0.63	-0.07	-5.28	-5.10	-7.27	28.11 KWD	1.18	18.16
Telecom	1,067.19	0.03	-1.57	-9.15	-5.75	-9.67	3.28 KWD	1.30	8.43
Industrials	959.84	-0.06	-0.84	-4.54	-2.75	-11.03	3.39 KWD	0.79	19.04
Financial services	1,181.24	0.86	0.63	-4.00	-1.23	-6.04	3.41 KWD	0.71	19.01
Real estate	1,103.45	0.20	1.46	-3.57	2.15	-8.71	2.39 KWD	0.53	20.68
Basic materials	913.62	1.48	5.29	2.42	6.59	5.61	0.80 KWD	1.53	5.72
Health care	458.82	0.00	0.00	0.40	0.73	-0.66	0.23 KWD	0.98	6.83
Consumer services	515.34	-0.82	-0.92	12.79	15.73	7.37	0.74 KWD	0.82	13.96
Insurance	2,130.70	-0.62	-0.72	0.80	11.56	37.39	0.88 KWD	0.76	8.71
Consumer Disc	1,495.47	0.54	1.29	2.62	2.29	0.58	0.16 KWD	0.97	0.00
Energy	999.08	0.11	0.18	2.07	0.12	-12.25	0.21 KWD	0.71	4.37
Technology	563.81	-3.00	-3.13	-3.13	-11.33	-19.02	0.01 KWD	0.70	0.00
Utilities	478.95	0.00	-1.09	4.00	2.83	-3.19	0.20 KWD	1.83	14.91



What Move the GCC markets

Oil Prices

Oil prices rose on Monday after U.S. leaders reached a tentative debt ceiling deal, possibly averting a default in the world's largest economy and oil consumer, although concerns about further interest rate hikes capped gains. Brent crude futures climbed 66 cents, or 0.9%, to \$77.61 a barrel

Kuwait Market

The market closed up today by + 0.5% at 6,798.47 value traded 30.1 million KD, Premier market value traded reached 20.7 million KD up by + 0.59% at 7,507.99

KSA Market

The market closed down today by – 0.42% at 11,1138.05.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



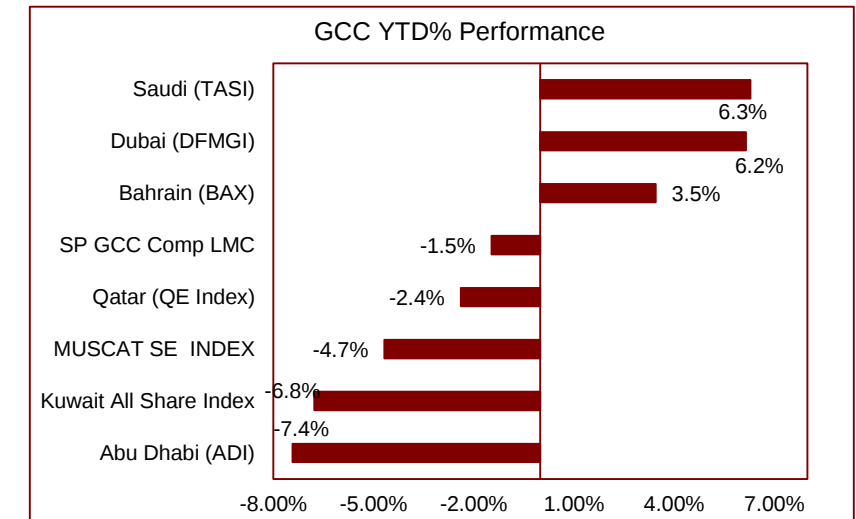
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.931	0.87	-0.21	-7.27	-7.43	-9.32	7.39 KWD	1.87	27.00
KFH	0.717	1.13	0.14	-3.24	-4.52	-4.17	10.60 KWD	1.83	32.00
Zain	0.505	-0.20	-2.13	-10.30	-6.48	-10.30	2.19 KWD	1.70	10.77
BOUBYAN BANK	0.596	0.00	2.41	-9.83	-1.75	-20.83	2.36 KWD	2.66	34.00
Agility	0.610	0.83	-0.33	-0.97	-1.77	-15.28	1.63 KWD	0.86	21.99
Saudi Arabia									
ARAMCO	31.95	0.16	-1.39	-3.18	8.81	9.49	7,732.31 SAR	5.18	13.73
SABIC	90.20	0.11	-1.10	-2.91	-0.11	0.89	270.61 SAR	1.45	35.00
STC	41.50	-2.70	-6.21	-6.53	3.62	13.39	207.51 SAR	2.77	17.39
AL-RAJHI BANK	72.10	-0.96	-3.74	-6.24	-1.90	-4.12	288.42 SAR	2.91	16.97
NCB	37.30	-0.67	-1.84	1.17	9.00	-1.03	223.81 SAR	1.30	12.12
United Arab Emirates									
ETISALAT.AD	23.10	1.58	4.90	-3.75	4.71	1.05	206.60 AED	5.10	21.10
FAB.AD	13.00	0.78	-6.34	-8.32	0.93	-23.98	143.62 AED	1.28	12.24
EMIRATES NBD	13.65	0.37	-2.50	-3.19	3.80	5.00	86.22 AED	0.90	5.16
DB ISLAMIC BK	5.17	0.00	-3.18	-7.01	-1.15	-9.30	37.43 AED	0.93	7.19
EMAAR PROPERT	5.89	0.68	-1.67	-0.67	5.18	0.51	52.06 AED	0.73	6.21
Qatar									
QNB	16.38	-0.73	-3.36	7.06	1.93	-9.00	151.42 QAR	1.49	10.81
INDUSTRIES QAT	12.83	0.47	-1.99	-0.93	-1.31	0.16	77.69 QAR	2.13	10.67
QA ISLAMIC BK	17.80	-0.06	-3.99	-0.50	0.11	-4.09	42.10 QAR	1.58	10.87
MASRAF AL RAYA	2.65	-0.45	-2.32	1.41	-10.19	-16.30	24.70 QAR	1.05	20.18
MESAIEED PETRO	2.00	0.00	-2.53	1.93	4.38	-5.78	25.20 QAR	1.54	15.80
OMAN									
BANK MUSCAT	0.260	0.39	-3.35	-4.76	-5.45	-5.45	1.95 OMR	0.90	8.33
OMANTEL	0.964	8.56	-2.03	-3.60	-12.36	4.78	0.72 OMR	1.19	7.69
BANK DHOFAR	0.176	0.00	0.00	13.55	10.00	0.57	0.53 QAR	0.74	14.93
NAT BANK OF OMAN	0.270	0.00	-3.57	-1.82	0.75	-6.57	0.44 QAR	0.68	12.71
OMINVEST	0.380	0.00	-0.52	-6.40	-23.39	-9.52	0.25 QAR	0.71	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
17-May 23	24.73%	15.98%	0.06%	1.35%	0.23%	4.62%	17.67%	14.04%	6.07%	4.96%
24-May 23	24.55%	15.75%	0.06%	1.35%	0.23%	4.61%	17.69%	14.02%	6.09%	4.96%

End of Report

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Leading Sector, Security Performance

Kuwait

The market is up today by + 0.5 %The leading sector best performance indices today are Basic materials 1.48 % Financial services 0.86 % Banking 0.63 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.16 %, SABIC have positive performance today by + 0.11 %. STC have negative performance today by -2.7 %, Al Rajhi Bank have negative performance today by -0.96 %

U.A.E

ETISALAT .AD has a positive performance today by + 1.58 %, FAB.AD has a positive performance today by + 0.78 %



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