

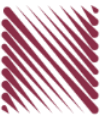


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, January 29th 2023





Market Watch

Sunday, January 29, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,839.49	0.16	1.47	3.45	3.45	3.45	10,174 SAR	1.76	15.46
Qatar (QE Index)	11,153.64	0.39	3.17	4.42	4.42	4.42	574 QAR	1.42	12.56
Dubai (DFMGI)	3,329.19	-0.84	-0.71	-0.21	-0.21	-0.21	480 AED	1.19	12.74
Abu Dhabi (ADI)	9,737.59	-2.63	-4.45	-4.64	-4.64	-4.64	1,435 AED	1.95	19.20
Bahrain (BAX)	1,929.86	0.12	0.14	1.83	1.83	1.83	20 BHD	1.66	15.07
MUSCAT SE INDEX	4,762.85	0.24	-0.74	-1.95	-1.95	-1.95	5 OMR	0.95	13.25
SP GCC Comp LMC	182.47	-0.28	0.83	2.07	2.07	2.07			
SP UAE PRICE INDEX	132.94	-2.96	-4.39	-3.31	-3.31	-3.31			

Developed Markets

MSCI World Index	2,785.84	0.30	3.74	7.04	7.04	7.04			
U.S. (S&P 500)	4,070.56	0.25	4.40	6.02	6.02	6.02			
U.K. (FTSE 100)	7,765.15	0.05	0.23	4.21	4.21	4.21			
Japan (Topix)	1,982.66	0.22	3.50	4.81	4.81	4.81			

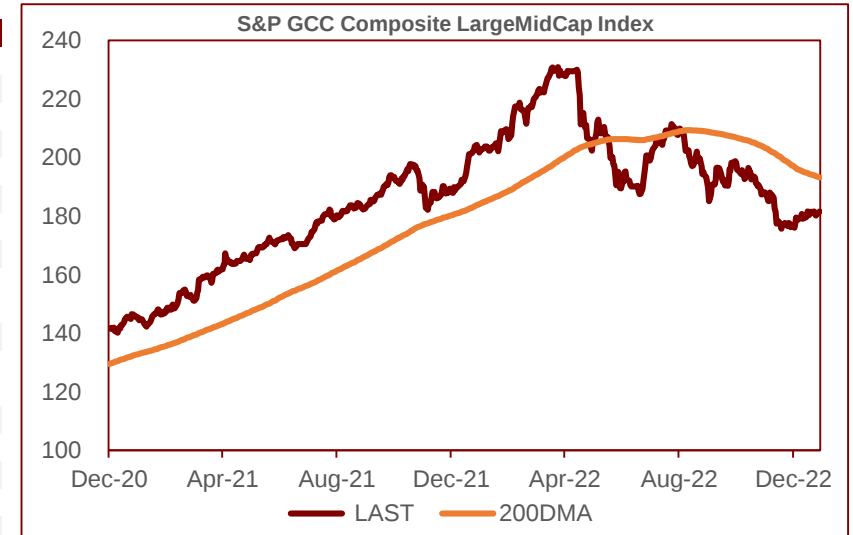
Emerging Markets

MSCI EM Index	1,051.19	-0.12	2.27	9.91	9.91	9.91			
China (SSE Composite)	3,264.81	0.00	0.76	5.68	5.68	5.68			
India (Sensex)	59,330.90	-1.45	-2.51	-2.48	-2.48	-2.48			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,331.83	0.28	1.03	0.54	0.54	0.54	47.40 KWD	2.14	29.22
Kuwait Premier Index	8,142.96	0.37	1.06	0.34	0.34	0.34	37.24 KWD	2.26	24.66
Kuwait Main Index	5,673.91	-0.07	0.93	1.38	1.38	1.38	10.16 KWD	1.67	45.98
NIC 50	9,101.52	-0.47	1.05	0.33	0.33	6.79	28.60 KWD	2.24	23.66

Kuwait Sector

Banking	1,824.30	0.33	0.98	1.69	1.69	1.69	30.70 KWD	1.39	25.66
Telecom	1,225.25	0.41	1.04	3.71	3.71	3.71	3.76 KWD	2.02	12.03
Industrials	987.99	0.40	2.09	-8.42	-8.42	-8.42	3.48 KWD	0.79	18.34
Financial services	1,265.36	-0.11	0.50	0.65	0.65	0.65	3.60 KWD	0.73	16.58
Real estate	1,188.03	0.32	1.06	-1.71	-1.71	-1.71	2.58 KWD	0.60	23.82
Basic materials	865.13	0.52	2.57	0.00	0.00	0.00	0.77 KWD	1.28	8.38
Health care	443.69	0.00	0.00	-3.93	-3.93	-3.93	0.22 KWD	2.47	11.92
Consumer services	492.24	-0.56	-0.22	2.56	2.56	2.56	0.71 KWD	0.95	11.31
Insurance	1,557.49	-0.42	0.49	0.43	0.43	0.43	0.64 KWD	0.83	9.50
Consumer Disc	1,407.63	-0.23	0.93	-5.33	-5.33	-5.33	0.15 KWD	0.97	0.00
Energy	1,140.44	-0.76	2.35	0.17	0.17	0.17	0.24 KWD	0.82	4.86
Technology	742.05	7.37	1.29	6.58	6.58	6.58	0.01 KWD	0.91	0.00
Utilities	481.58	0.55	1.10	-2.66	-2.66	-2.66	0.20 KWD	1.69	15.05



What Move the GCC markets

Oil Prices

Oil prices climbed in early Asia trade on Monday, supported by tensions in the Middle East following a drone attack in Iran and as Beijing pledged over the weekend to promote a consumption recovery which would support fuel demand. Brent crude futures rose 54 cents, or 0.6%, to \$87.20 a barrel while U.S. West Texas Intermediate crude was at \$80.22 a barrel, up 54 cents, or 0.7%.

Kuwait Market

The market closed up today by + 0.28% at 7,331.83 value traded 33.9 million KD, Premier market value traded reached 24.1 million KD up by +0.37% at 8,142.96.

KSA Market

The market closed up today by + 0.16% at 10,839.49.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



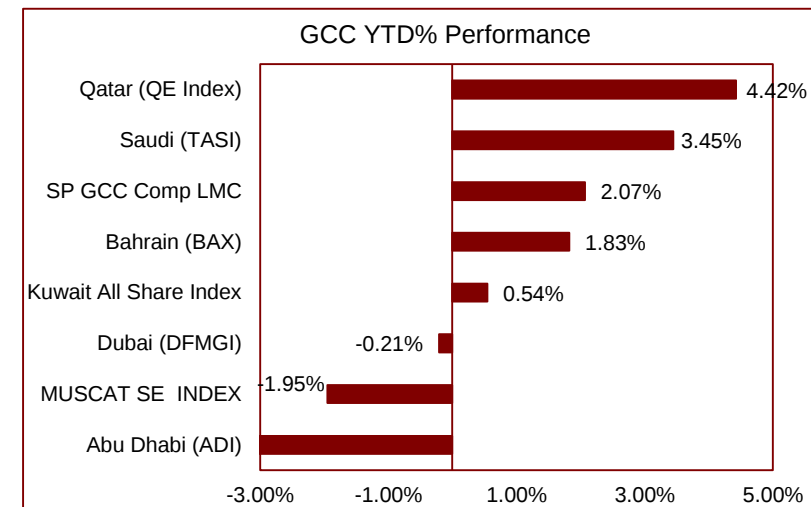
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.117	1.45	1.55	3.62	3.62	3.62	8.43 KWD	2.15	27.00
KFH	0.830	-0.36	1.22	0.85	0.85	0.85	11.14 KWD	3.42	32.00
Zain	0.562	0.18	0.36	-0.18	-0.18	-0.18	2.43 KWD	2.02	12.03
BOUBYAN BANK	0.805	0.37	-0.49	0.88	0.88	0.88	3.01 KWD	3.19	34.00
Agility	0.596	0.34	2.05	-17.22	-17.22	-17.22	1.59 KWD	1.10	38.95
Saudi Arabia									
ARAMCO	33.00	0.30	2.48	2.80	2.80	2.80	7,260.00 SAR	5.23	12.57
SABIC	95.00	-0.42	0.53	6.26	6.26	6.26	285.00 SAR	1.56	35.00
STC	37.60	0.40	0.27	2.73	2.73	2.73	188.00 SAR	2.56	15.55
AL-RAJHI BANK	82.20	1.61	5.79	9.31	9.31	9.31	328.80 SAR	3.82	21.28
NCB	48.20	-0.10	0.31	-4.55	-4.55	-4.55	215.84 SAR	1.32	11.64
United Arab Emirates									
ETISALAT.AD	24.56	-3.91	-4.44	7.44	7.44	7.44	206.60 AED	5.10	21.10
FAB.AD	13.60	-4.76	-13.38	-20.47	-20.47	-20.47	150.25 AED	1.31	11.52
EMIRATES NBD	12.95	-0.38	1.97	-0.38	-0.38	-0.38	81.79 AED	0.88	6.54
DB ISLAMIC BK	5.61	-0.71	0.18	-1.58	-1.58	-1.58	40.62 AED	0.98	8.03
EMAAR PROPERT	5.72	-1.55	-2.22	-2.39	-2.39	-2.39	50.55 AED	0.72	6.59
Qatar									
QNB	18.65	0.87	5.97	3.61	3.61	3.61	173.11 QAR	1.64	12.98
INDUSTRIES QAT	13.90	0.51	1.39	8.51	8.51	8.51	84.51 QAR	2.08	8.86
QA ISLAMIC BK	19.94	0.45	4.95	7.44	7.44	7.44	47.35 QAR	1.73	12.34
MASRAF AL RAYA	3.05	-0.75	0.36	-3.97	-3.97	-3.97	28.46 QAR	1.17	19.06
MESAIEED PETRO	2.23	0.18	2.76	4.84	4.84	4.84	28.15 QAR	1.63	14.79
OMAN									
BANK MUSCAT	0.276	0.36	-1.08	0.36	0.36	0.36	2.07 OMR	0.95	8.33
OMANTEL	0.948	6.76	0.00	3.04	3.04	3.04	0.71 OMR	1.20	7.69
BANK DHOFAR	0.160	0.00	-5.88	-8.57	-8.57	-8.57	0.48 QAR	0.68	14.93
NAT BANK OF OMAN	0.290	0.00	1.75	0.35	0.35	0.35	0.47 QAR	0.81	12.71
OMINVEST	0.416	-0.48	-0.95	-0.95	-0.95	-0.95	0.28 QAR	0.83	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
18-Jan 23	24.67%	17.07%	0.06%	1.33%	0.37%	4.50%	17.67%	12.29%	5.86%	5.16%
25-Jan 23	24.69%	16.88%	0.06%	1.34%	0.37%	4.74%	17.67%	15.21%	5.86%	5.17%

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, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.28 %The leading sector best performance indices today are Technology 7.37 % Utilities 0.55 % Basic materials 0.52 % respectively

KSA

Saudi Armco has a positive performance today by + 0.3 %, SABIC have negative performance today by -0.41%. STC has a positive performance today by + 0.4 %, Al Rajhi Bank has a positive performance today by + 1.61 %

U.A.E

ETISALAT .AD have negative performance today by -3.91 %, FAB.AD have negative performance today by -4.76 %



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