



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, March 29th 2023

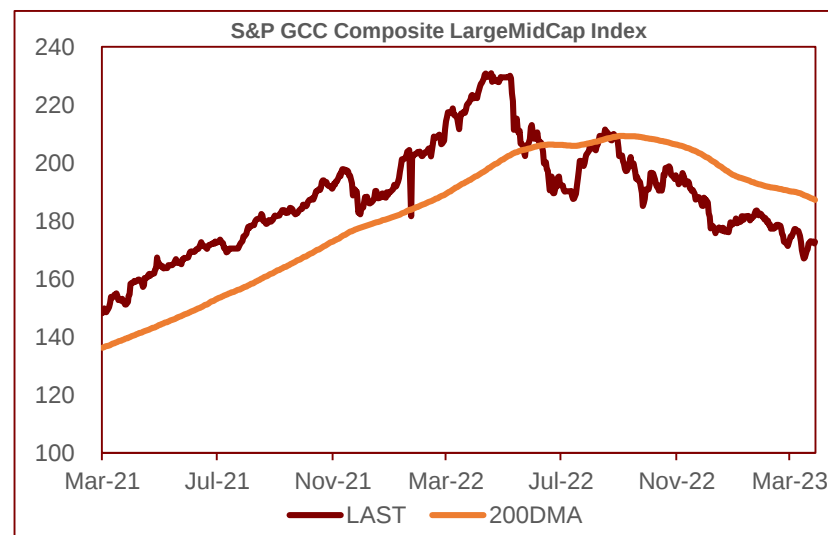




Market Watch

Wednesday, March 29th 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,503.18	0.34	0.54	3.96	0.24	0.24	9,978 SAR	1.72	17.85
Qatar (QE Index)	10,213.34	-0.92	2.07	-3.38	-4.38	-4.38	516 QAR	1.27	11.16
Dubai (DFMGI)	3,400.67	0.48	1.09	-1.08	1.94	1.94	494 AED	1.16	18.92
Abu Dhabi (ADI)	9,455.81	-0.01	-0.99	-3.95	-7.40	-7.40	1,435 AED	1.71	20.71
Bahrain (BAX)	1,894.37	0.78	-0.22	-1.94	-0.05	-0.05	19 BHD	1.72	18.00
MUSCAT SE INDEX	4,854.31	-0.09	-0.34	2.13	-0.06	-0.06	5 OMR	1.00	13.25
SP GCC Comp LMC	172.73	-0.05	-0.18	0.18	-3.38	-3.38			
SP UAE PRICE INDEX	129.13	0.04	-0.98	-5.23	-6.09	-6.09			
Developed Markets									
MSCI World Index	2,739.42	1.28	1.58	0.92	5.25	5.25			
U.S. (S&P 500)	4,027.81	1.42	2.00	1.45	4.90	4.90			
U.K. (FTSE 100)	7,564.27	1.07	0.86	-3.96	1.51	1.51			
Japan (Topix)	1,995.48	1.46	1.95	0.11	5.49	5.49			
Emerging Markets									
MSCI EM Index	980.14	0.97	0.24	1.67	2.48	2.48			
China (SSE Composite)	3,240.06	-0.16	-1.42	-1.21	4.88	4.88			
India (Sensex)	57,960.09	0.60	0.06	-1.70	-4.73	-4.73			
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,022.69	-0.10	-0.40	-3.06	-3.69	-3.69	45.51 KWD	1.66	25.66
Kuwait Premier Index	7,786.30	0.02	-0.33	-3.51	-4.06	-4.06	35.61 KWD	1.65	22.26
Kuwait Main Index	5,492.32	-0.60	-0.69	-1.02	-1.87	-1.87	9.91 KWD	1.68	37.92
NIC 50	8,704.10	-0.02	-0.34	-3.52	-4.07	-4.18	28.60 KWD	1.63	21.26
Kuwait Sector									
Banking	1,745.54	0.01	-0.30	-3.55	-2.70	-2.70	29.43 KWD	1.25	23.26
Telecom	1,136.71	-0.41	-1.14	-2.96	-3.79	-3.79	3.49 KWD	1.91	11.97
Industrials	978.40	0.38	-0.30	-1.21	-9.31	-9.31	3.44 KWD	0.78	14.35
Financial services	1,186.47	-0.84	-0.64	-4.02	-5.63	-5.63	3.46 KWD	0.65	18.43
Real estate	1,075.97	-0.36	-1.28	-5.78	-10.98	-10.98	2.34 KWD	0.54	16.31
Basic materials	850.82	1.27	1.98	0.80	-1.65	-1.65	0.76 KWD	1.34	7.86
Health care	455.49	0.00	0.00	-0.99	-1.38	-1.38	0.23 KWD	2.48	10.05
Consumer services	447.36	0.46	-2.90	-6.52	-6.79	-6.79	0.73 KWD	0.85	12.51
Insurance	1,906.28	-0.30	0.68	17.13	22.92	22.92	0.78 KWD	0.80	10.16
Consumer Disc	1,464.52	-0.50	-0.05	0.55	-1.50	-1.50	0.14 KWD	0.91	0.00
Energy	1,010.49	-1.22	1.59	-0.72	-11.25	-11.25	0.21 KWD	0.59	4.28
Technology	635.83	-0.68	-5.00	-6.12	-8.67	-8.67	0.01 KWD	0.78	0.00
Utilities	457.89	-0.57	-1.14	-4.40	-7.45	-7.45	0.19 KWD	1.64	13.23



What Move the GCC markets

Oil Prices

Crude prices rose for a third day in early Asian trade on Wednesday as a halt to some exports from Iraqi Kurdistan raised concerns of tightening supply and market sentiment improved as fears of a banking crisis eased. Brent crude futures rose 79 cents, or 1%, to \$79.44 a barrel.

Kuwait Market

The market closed down today by - 0.10% at 7,022.69 value traded 36.8 million KD, Premier market value traded reached 34.6 million KD up by + 0.02% at 7,786.30.

KSA Market

The market closed up today by + 0.34% at 10,503.18.



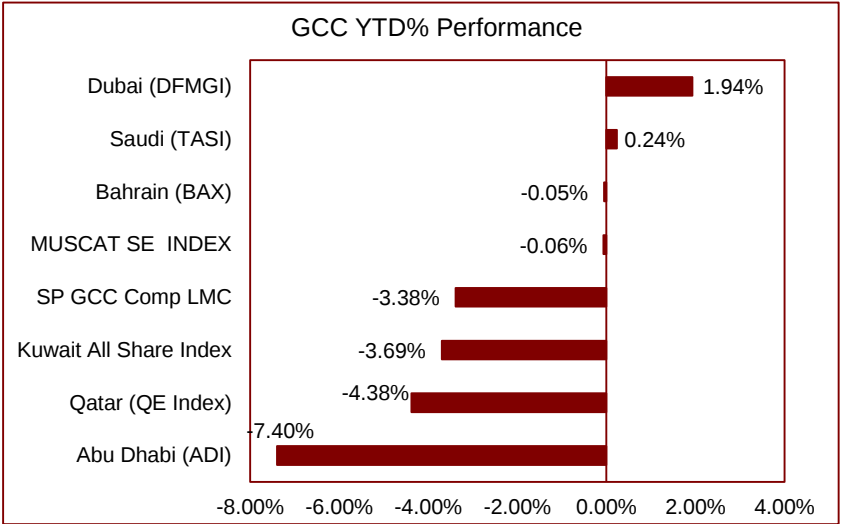
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.052	-0.66	-0.75	-1.68	-2.41	-2.41	7.95 KWD	1.96	27.00
KFH	0.822	-0.24	-0.24	-4.08	-0.12	-0.12	11.04 KWD	1.87	32.00
Zain	0.542	0.74	0.37	-3.04	-3.73	-3.73	2.35 KWD	1.91	11.97
BOUBYAN BANK	0.646	3.03	-0.77	-15.56	-19.05	-19.05	2.42 KWD	2.54	34.00
Agility	0.612	0.00	-0.16	1.49	-15.00	-15.00	1.64 KWD	1.13	40.00
Saudi Arabia									
ARAMCO	32.40	0.31	0.78	1.89	0.93	0.93	7,127.24 SAR	4.92	12.16
SABIC	89.80	-0.22	-0.55	1.47	0.45	0.45	269.37 SAR	1.45	35.00
STC	40.40	0.50	3.59	14.94	10.38	10.38	201.98 SAR	2.74	16.49
AL-RAJHI BANK	72.30	-0.28	-1.63	2.84	-3.86	-3.86	289.17 SAR	2.89	18.59
NCB	44.85	-0.11	-3.44	-5.08	-11.19	-11.19	200.82 SAR	1.20	10.96
United Arab Emirates									
ETISALAT.AD	22.66	-2.83	-4.63	-11.14	-0.87	-0.87	206.60 AED	5.10	21.10
FAB.AD	13.02	-0.46	-2.98	-7.53	-23.86	-23.86	143.84 AED	1.25	11.03
EMIRATES NBD	13.30	2.31	3.50	-2.21	2.31	2.31	84.01 AED	0.90	6.72
DB ISLAMIC BK	5.36	0.19	-2.90	-6.62	-5.96	-5.96	38.81 AED	0.94	7.67
EMAAR PROPERT	5.59	-1.06	1.27	-0.18	-4.61	-4.61	49.41 AED	0.72	6.71
Qatar									
QNB	16.19	-1.28	1.76	-3.92	-10.06	-10.06	148.47 QAR	1.42	11.27
INDUSTRIES QAT	13.00	-1.29	0.39	-6.61	1.48	1.48	78.09 QAR	1.87	8.92
QA ISLAMIC BK	17.85	-3.51	1.13	-4.03	-3.83	-3.83	41.88 QAR	1.55	11.05
MASRAF AL RAYA	2.87	2.90	10.00	6.30	-9.49	-9.49	26.50 QAR	1.11	18.21
MESAIEED PETRO	1.95	-2.41	0.31	-7.38	-8.51	-8.51	24.27 QAR	1.40	13.83
OMAN									
BANK MUSCAT	0.275	0.00	0.00	-5.82	0.00	0.00	2.06 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
22-March 23	24.76%	16.45%	0.06%	1.37%	0.41%	4.63%	17.70%	14.43%	5.81%	5.10%
29-March 23	24.80%	16.29%	0.06%	1.37%	0.41%	4.59%	17.70%	14.39%	5.93%	5.11%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.1 %The leading sector bottom performance indices today are Energy -1.22 % Financial services -0.84 % Technology -0.68 % respectively

KSA

Saudi Armco has a positive performance today by + 0.31 %, SABIC has a negative performance today by -0.22 %, STC has a positive performance today by + 0.5 %, Al Rajhi Bank has a negative performance today by -0.28 %

U.A.E

ETISALAT .AD has a negative performance today by -2.83 %, FAB.AD has a negative performance today by -0.46 %



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