

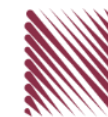


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, April 2nd 2023

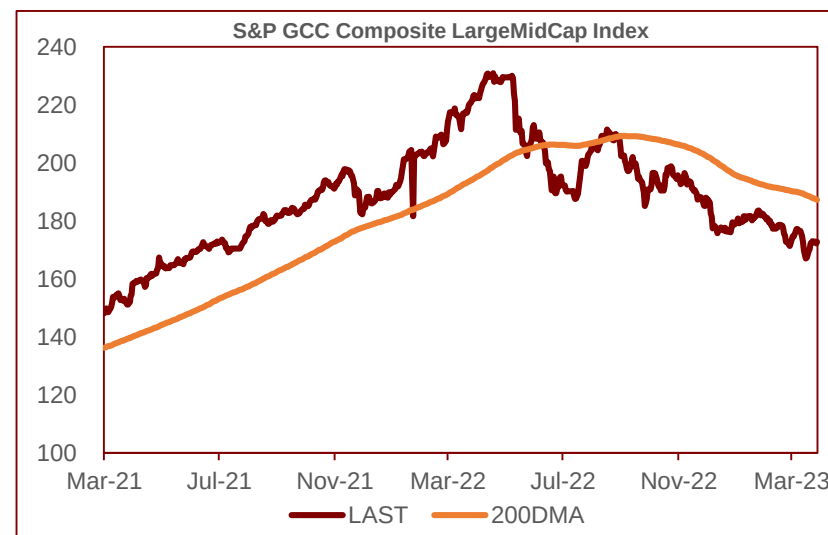




Market Watch

Sunday, April 2nd 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,636.62	0.44	0.44	0.44	-18.74	1.51	10,009 SAR	1.77	17.37
Qatar (QE Index)	10,092.64	-1.17	-1.17	-1.17	-25.42	-5.51	513 QAR	1.26	10.95
Dubai (DFMGI)	3,406.72	-0.55	-0.55	0.00	-3.40	2.12	495 AED	1.18	19.83
Abu Dhabi (ADI)	9,430.25	-0.51	-0.51	0.00	-5.21	-7.65	1,435 AED	1.71	20.79
Bahrain (BAX)	1,889.73	0.17	0.17	0.17	-8.86	-0.29	19 BHD	1.72	18.00
MUSCAT SE INDEX	4,812.01	-1.05	-1.05	-1.05	14.43	-0.94	5 OMR	1.01	13.25
SP GCC Comp LMC	173.82	-0.14	-0.14	0.08	-21.96	-2.77			
SP UAE PRICE INDEX	127.97	-1.13	-1.13	0.00	-25.59	-6.93			
Developed Markets									
MSCI World Index	2,791.44	1.15	1.15	1.15	-8.57	7.25			
U.S. (S&P 500)	4,109.31	1.44	1.44	1.44	-9.29	7.03			
U.K. (FTSE 100)	7,631.74	0.15	0.15	0.15	1.54	2.42			
Japan (Topix)	2,003.50	1.02	1.02	1.02	2.93	5.91			
Emerging Markets									
MSCI EM Index	990.28	0.46	0.46	0.46	-13.27	3.55			
China (SSE Composite)	3,272.86	0.36	0.36	0.36	0.64	5.94			
India (Sensex)	58,991.52	1.78	1.78	1.78	0.72	-3.04			
Kuwait									
Kuwait All Share Index	7,057.51	0.10	0.10	0.10	-13.37	-3.22	45.71 KWD	1.67	21.54
Kuwait Premier Index	7,839.47	0.23	0.23	0.23	-13.49	-3.40	35.83 KWD	1.66	22.32
Kuwait Main Index	5,474.16	-0.48	-0.48	-0.48	-12.48	-2.19	9.89 KWD	1.67	18.75
NIC 50	8,756.86	0.07	0.22	0.22	-13.50	-3.60	28.60 KWD	1.64	21.32
Kuwait Sector									
Banking	1,762.99	0.58	0.58	0.58	-8.66	-1.72	29.69 KWD	1.28	23.32
Telecom	1,127.15	-0.45	-0.45	-0.45	-10.70	-4.60	3.46 KWD	1.89	11.88
Industrials	956.29	-3.11	-3.11	-3.11	-26.15	-11.36	3.36 KWD	0.78	17.47
Financial services	1,195.81	-0.01	-0.01	-0.01	-28.00	-4.89	3.50 KWD	0.67	16.42
Real estate	1,080.94	0.07	0.07	0.07	-22.53	-10.57	2.35 KWD	0.51	16.89
Basic materials	849.71	-0.87	-0.87	-0.87	-26.86	-1.78	0.76 KWD	1.33	7.87
Health care	462.45	1.53	1.53	1.53	-6.58	0.13	0.23 KWD	2.48	10.54
Consumer services	451.47	1.39	1.39	1.39	-36.57	-5.93	0.72 KWD	0.85	12.42
Insurance	1,920.04	0.53	0.53	0.53	18.43	23.81	0.79 KWD	0.82	10.16
Consumer Disc	1,441.11	-1.43	-1.43	-1.43	-6.60	-3.07	0.14 KWD	0.91	0.00
Energy	1,004.01	0.61	0.61	0.61	-22.70	-11.81	0.21 KWD	0.59	4.33
Technology	635.83	0.00	0.00	0.00	-6.02	-8.67	0.01 KWD	0.78	0.00
Utilities	463.16	-0.56	-0.56	-0.56	-21.08	-6.38	0.19 KWD	1.66	13.38



What Move the GCC markets

Oil Prices

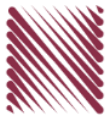
Oil prices rose by more than a dollar a barrel on Friday to record their second-straight week of gains, as supplies tightened in some parts of the world and U.S. inflation data indicated price rises were slowing. The most actively traded Brent futures, for June delivery, settled up \$1.29, or 1.6%, at \$79.89 a barrel

Kuwait Market

The market closed up today by + 0.10% at 7,057.51 value traded 50.9 million KD, Premier market value traded reached 46.2 million KD up by + 0.23% at 7,839.47.

KSA Market

The market closed up today by + 0.44% at 10,636.62.



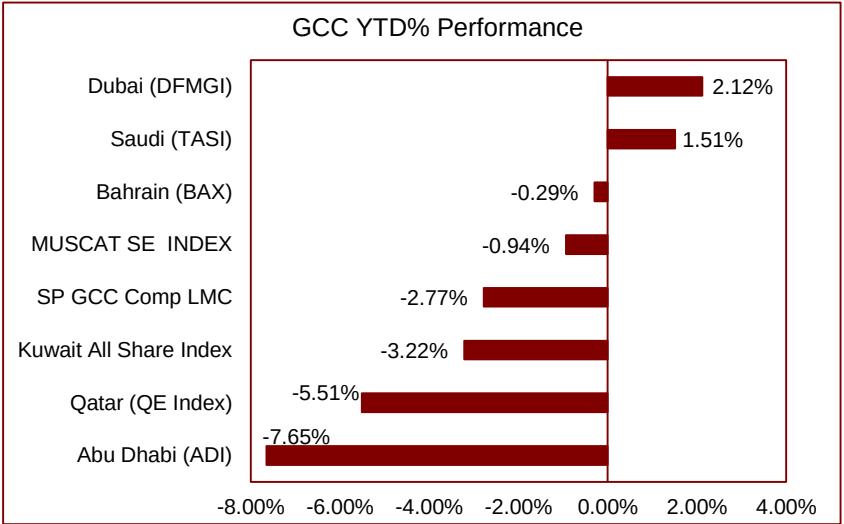
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.010	0.38	0.38	0.38	-3.55	-1.67	8.01 KWD	1.97	27.00
KFH	0.838	1.45	1.45	1.45	-13.93	1.82	11.25 KWD	1.91	32.00
Zain	0.538	-0.37	-0.37	-0.37	-14.33	-4.44	2.33 KWD	1.89	11.88
BOUBYAN BANK	0.638	-0.78	-0.78	-0.78	-24.65	-20.05	2.39 KWD	2.51	34.00
Agility	0.581	-6.44	-6.44	-6.44	-36.90	-19.31	1.55 KWD	1.07	37.97
Saudi Arabia									
ARAMCO	32.35	0.15	0.15	0.15	-17.44	0.78	7,117.19 SAR	4.91	12.16
SABIC	91.80	1.66	1.66	1.66	-29.92	2.68	275.40 SAR	1.48	35.00
STC	40.40	0.87	0.87	0.87	-6.31	10.38	202.00 SAR	2.74	16.43
AL-RAJHI BANK	73.70	0.27	0.27	0.27	-26.58	-1.99	294.81 SAR	2.94	18.85
NCB	46.00	0.33	0.33	0.33	-35.12	-8.91	205.99 SAR	1.23	11.19
United Arab Emirates									
ETISALAT.AD	22.06	-1.52	-1.52	-1.52	-40.31	-3.50	206.60 AED	5.10	21.10
FAB.AD	12.88	-1.83	-1.83	-1.83	-45.42	-24.68	142.29 AED	1.24	10.91
EMIRATES NBD	13.15	-0.38	-0.38	-0.38	-12.33	1.15	83.06 AED	0.89	6.64
DB ISLAMIC BK	5.23	-2.43	-2.43	-2.43	-15.24	-8.25	37.87 AED	0.92	7.49
EMAAR PROPERT	5.60	-2.10	-2.10	-2.10	-6.67	-4.44	49.50 AED	0.72	6.73
Qatar									
QNB	15.63	-2.74	-2.74	-2.74	-32.25	-13.17	144.37 QAR	1.37	10.88
INDUSTRIES QAT	12.92	-0.62	-0.62	-0.62	-32.00	0.86	78.17 QAR	1.86	8.87
QA ISLAMIC BK	17.81	0.17	0.17	0.17	-25.29	-4.04	42.08 QAR	1.54	11.02
MASRAF AL RAYA	2.81	-4.91	-4.91	-4.91	-45.65	-11.38	26.13 QAR	1.09	17.83
MESAIEED PETRO	1.93	0.63	0.63	0.63	-33.61	-9.17	24.27 QAR	1.39	13.73
OMAN									
BANK MUSCAT	0.275	0.00	0.00	0.00	7.84	0.00	2.06 OMR	0.92	8.33
OMANTEL	1.060	19.37	-3.64	-3.64	21.00	15.22	0.79 OMR	1.25	7.69
BANK DHOFAR	0.160	0.00	0.00	0.00	39.13	-8.57	0.48 QAR	0.67	14.93
NAT BANK OF OMAN	0.267	-0.37	-0.37	-0.37	30.24	-7.61	0.43 QAR	0.68	12.71
OMINVEST	0.448	-9.68	-9.68	-9.68	32.54	6.67	0.30 QAR	0.84	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, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.1 %The leading sector best performance indices today are Health care 1.53 % Consumer services 1.39 % Energy 0.61 % respectively

KSA

Saudi Armco has a positive performance today by + 0.15 %, SABIC has a positive performance today by + 1.66 %, STC has a positive performance today by + 0.87 %, Al Rajhi Bank has a positive performance today by + 0.27 %

U.A.E

ETISALAT .AD has a negative performance today by -1.52 %, FAB.AD has a negative performance today by -1.83 %



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