

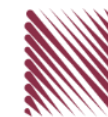


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, February 2nd 2023





Market Watch

Thursday, February 2, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,701.79	-0.76	-1.11	-0.84	2.13	2.13	10,053 SAR	1.76	15.31
Qatar (QE Index)	10,698.04	-0.94	-3.71	-2.14	0.16	0.16	547 QAR	1.40	12.01
Dubai (DFMGI)	3,382.90	0.52	0.23	1.88	0.87	0.87	487 AED	1.21	12.84
Abu Dhabi (ADI)	9,931.09	0.14	-1.42	0.48	-3.45	-3.45	1,435 AED	1.97	19.98
Bahrain (BAX)	1,921.23	-0.01	-0.33	-0.36	1.37	1.37	20 BHD	1.66	15.27
MUSCAT SE INDEX	4,719.71	0.21	-0.67	0.35	-2.84	-2.84	5 OMR	0.95	13.25
SP GCC Comp LMC	180.91	-0.52	-1.39	-0.54	0.93	0.93			
SP UAE PRICE INDEX	137.24	0.18	-1.26	1.03	-1.61	-1.61			

Developed Markets

MSCI World Index	2,820.73	1.35	2.53	2.26	9.42	9.42			
U.S. (S&P 500)	4,136.48	1.47	2.94	2.53	8.86	8.86			
U.K. (FTSE 100)	7,901.80	0.76	0.76	0.62	4.94	4.94			
Japan (Topix)	1,970.26	-0.36	-0.67	-0.51	3.88	3.88			

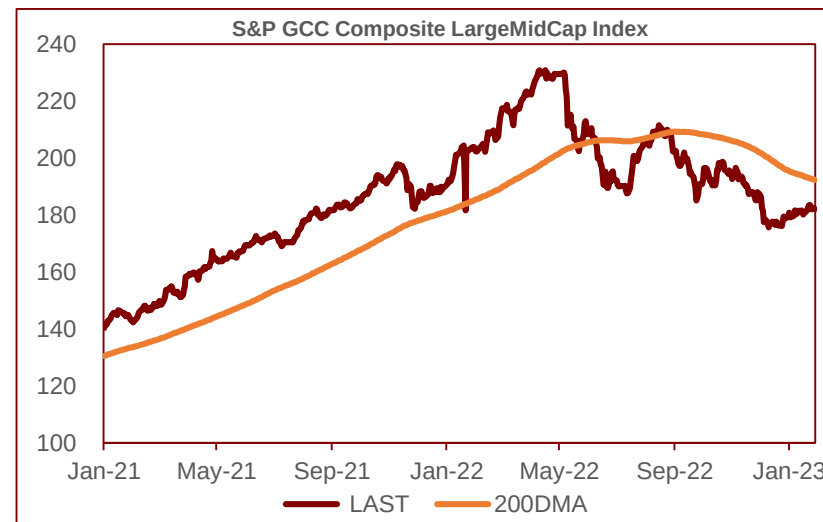
Emerging Markets

MSCI EM Index	1,038.72	0.27	-0.66	1.36	9.33	9.33			
China (SSE Composite)	3,263.41	0.02	0.64	0.92	6.36	6.36			
India (Sensex)	60,841.88	0.38	-0.45	0.64	-1.49	-1.49			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,330.29	0.31	0.26	0.73	0.52	0.52	47.39 KWD	2.12	29.11
Kuwait Premier Index	8,160.04	0.36	0.58	0.92	0.55	0.55	37.33 KWD	2.25	24.58
Kuwait Main Index	5,620.73	0.11	-1.01	-0.05	0.43	0.43	10.06 KWD	1.64	45.98
NIC 50	9,101.52	-0.47	0.57	0.91	0.54	6.79	28.60 KWD	2.23	23.58

Kuwait Sector

Banking	1,826.28	0.22	0.44	0.71	1.80	1.80	30.74 KWD	1.40	25.58
Telecom	1,212.11	0.55	-0.66	1.21	2.59	2.59	3.72 KWD	2.03	12.07
Industrials	990.68	0.69	0.68	1.10	-8.18	-8.18	3.48 KWD	0.78	18.26
Financial services	1,263.70	0.64	-0.24	0.79	0.51	0.51	3.60 KWD	0.73	16.45
Real estate	1,193.38	0.48	0.77	0.38	-1.27	-1.27	2.59 KWD	0.59	23.91
Basic materials	866.50	0.77	0.68	0.39	0.16	0.16	0.77 KWD	1.28	8.40
Health care	425.54	-4.09	-4.09	-4.09	-7.86	-7.86	0.21 KWD	2.47	10.30
Consumer services	475.46	-2.74	-3.95	-0.86	-0.94	-0.94	0.71 KWD	0.93	11.40
Insurance	1,565.78	0.73	0.11	0.78	0.96	0.96	0.64 KWD	0.82	9.50
Consumer Disc	1,412.86	0.59	0.14	0.65	-4.98	-4.98	0.14 KWD	0.95	0.00
Energy	1,101.14	0.22	-4.18	0.24	-3.28	-3.28	0.23 KWD	0.63	5.02
Technology	712.95	2.51	3.16	2.51	2.40	2.40	0.01 KWD	0.87	0.00
Utilities	473.68	-1.10	-1.10	-1.10	-4.26	-4.26	0.20 KWD	1.67	14.80



What Move the GCC markets

Oil Prices

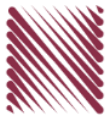
Oil prices were steady on Thursday after tumbling in the previous session as a weaker dollar boosted sentiment, though looming sanctions on Russian oil products added uncertainty over supply. Brent crude futures 1 cent to \$82.85 a barrel

Kuwait Market

The market closed up today by + 0.31% at 7,330.29 value traded 33.5 million KD, Premier market value traded reached 26.0 million KD up by + 0.36% at 8,160.04.

KSA Market

The market closed down today by – 0.76% at 10,701.79.



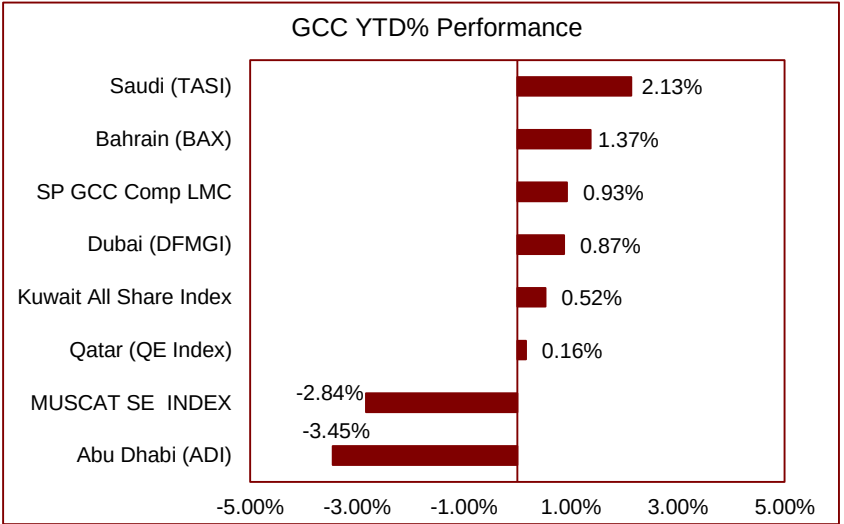
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.119	0.36	1.63	2.01	3.80	3.80	8.45 KWD	2.08	27.00
KFH	0.837	0.36	0.48	0.12	1.70	1.70	11.23 KWD	3.45	32.00
Zain	0.564	0.71	0.53	1.81	0.18	0.18	2.44 KWD	2.03	12.07
BOUBYAN BANK	0.792	0.25	-1.25	1.02	-0.75	-0.75	2.96 KWD	3.12	34.00
Agility	0.602	0.84	1.35	1.86	-16.39	-16.39	1.61 KWD	1.11	39.35
Saudi Arabia									
ARAMCO	32.60	-0.91	-0.91	-1.06	1.56	1.56	7,172.00 SAR	5.16	12.57
SABIC	91.40	-1.61	-4.19	-1.40	2.24	2.24	274.20 SAR	1.50	35.00
STC	37.10	0.27	-0.93	0.54	1.37	1.37	185.50 SAR	2.52	15.36
AL-RAJHI BANK	80.50	-0.74	-0.49	-1.83	7.05	7.05	322.00 SAR	3.74	20.91
NCB	48.80	1.35	1.14	3.17	-3.37	-3.37	218.53 SAR	1.33	11.76
United Arab Emirates									
ETISALAT.AD	25.80	0.55	0.94	0.39	12.86	12.86	206.60 AED	5.10	21.10
FAB.AD	13.82	0.14	-3.22	1.62	-19.18	-19.18	155.78 AED	1.35	11.71
EMIRATES NBD	13.30	0.38	2.31	2.70	2.31	2.31	85.28 AED	0.91	6.72
DB ISLAMIC BK	5.57	0.00	-1.42	0.36	-2.28	-2.28	40.40 AED	0.98	7.97
EMAAR PROPERT	5.52	-2.13	-4.99	-0.72	-5.80	-5.80	48.88 AED	0.69	6.36
Qatar									
QNB	17.32	-0.92	-6.33	-3.78	-3.78	-3.78	159.97 QAR	1.52	12.05
INDUSTRIES QAT	13.80	0.00	-0.22	-1.78	7.73	7.73	83.49 QAR	2.06	8.79
QA ISLAMIC BK	19.20	-1.34	-3.27	-2.39	3.45	3.45	45.37 QAR	1.66	11.88
MASRAF AL RAYA	2.66	-0.71	-13.33	-2.60	-16.15	-16.15	24.73 QAR	1.03	16.87
MESAIEED PETRO	2.17	-0.64	-2.34	1.12	2.21	2.21	27.31 QAR	1.59	14.42
OMAN									
BANK MUSCAT	0.280	0.36	1.82	1.45	1.82	1.82	2.10 OMR	0.97	8.33
OMANTEL	0.976	9.91	2.95	2.95	6.09	6.09	0.73 OMR	1.24	7.69
BANK DHOFAR	0.150	-3.23	-6.25	0.00	-14.29	-14.29	0.45 QAR	0.63	14.93
NAT BANK OF OMAN	0.275	3.77	-5.17	0.36	-4.84	-4.84	0.45 QAR	0.77	12.71
OMINVEST	0.418	0.00	0.00	0.00	-0.48	-0.48	0.28 QAR	0.83	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
25-Jan 23	24.69%	16.88%	0.06%	1.34%	0.37%	4.74%	17.67%	15.21%	5.86%	5.17%
1-Feb 23	24.69%	16.82%	0.06%	1.35%	0.38%	4.47%	17.66%	15.20%	5.86%	5.19%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.31 %The leading sector best performance indices today are Technology 2.51 % Basic materials 0.77 % Insurance 0.73 % respectively

KSA

Saudi Armco has a negative performance today by -0.91 %, SABIC has a negative performance today by -1.61 %, STC has a positive performance today by + 0.27 %, Al Rajhi Bank has a negative performance today by -0.74 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.55 %, FAB.AD has a positive performance today by + 0.14 %



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