

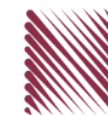


شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, March 2nd 2023



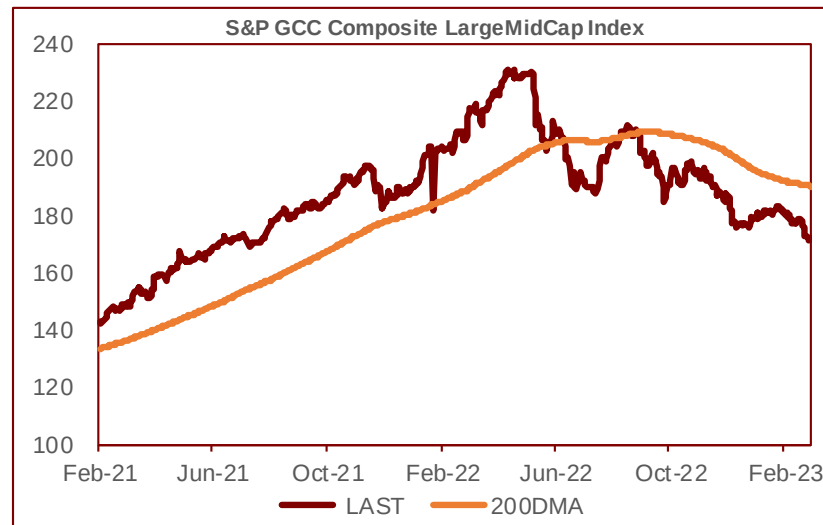


Market Watch

Thursday, 2nd March, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,385.63	0.84	1.23	1.73	-1.92	-1.92	9,756 SAR	1.65	15.69
Qatar (QE Index)	10,621.81	0.47	1.43	0.48	-0.55	-0.55	539 QAR	1.35	11.51
Dubai (DFMGI)	3,420.26	-0.32	0.70	-0.05	2.99	2.99	492 AED	1.19	19.32
Abu Dhabi (ADI)	9,906.71	0.14	0.24	0.24	-3.36	-3.36	1,435 AED	1.91	23.28
Bahrain (BAX)	1,929.90	-0.11	-0.49	-0.11	1.82	1.82	20 BHD	1.73	18.00
MUSCAT SE INDEX	4,860.73	0.85	3.67	1.42	-0.75	-0.75	5 OMR	0.96	13.25
SP GCC Comp LMC	174.56	0.63	1.11	1.28	-2.32	-2.32			
SP UAE PRICE INDEX	135.98	0.03	0.74	0.02	-0.89	-0.89			
Developed Markets									
MSCI World Index	2,757.97	0.48	-0.65	0.19	4.49	4.49			
U.S. (S&P 500)	4,045.64	0.76	-0.77	0.28	3.69	3.69			
U.K. (FTSE 100)	7,947.11	0.37	0.46	0.86	6.61	6.61			
Japan (Topix)	2,019.52	-0.16	0.98	0.06	5.44	5.44			
Emerging Markets									
MSCI EM Index	988.03	-0.42	-0.78	1.66	2.48	2.48			
China (SSE Composite)	3,328.39	-0.05	0.70	0.95	7.17	7.17			
India (Sensex)	59,808.97	-0.84	-1.17	-0.09	-3.17	-3.17			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,330.69	0.42	0.27	0.59	-0.07	-0.07	47.16 KWD	1.75	28.15
Kuwait Premier Index	8,179.49	0.45	0.22	0.67	0.10	0.10	37.16 KWD	1.76	23.29
Kuwait Main Index	5,572.42	0.30	0.52	0.22	-0.64	-0.64	10.00 KWD	1.67	46.31
NIC 50	9,077.30	0.40	0.21	0.66	0.09	-0.07	28.60 KWD	1.74	22.29
Kuwait Sector									
Banking	1,837.00	0.46	0.20	0.79	1.69	1.69	30.73 KWD	1.30	24.29
Telecom	1,179.33	0.33	1.24	0.35	-0.50	-0.50	3.61 KWD	2.00	11.90
Industrials	993.29	-0.12	0.19	-0.27	-8.45	-8.45	3.48 KWD	0.76	18.41
Financial services	1,253.10	1.19	0.59	0.93	-0.77	-0.77	3.56 KWD	0.71	17.66
Real estate	1,139.68	-0.12	0.10	-0.48	-5.97	-5.97	2.47 KWD	0.55	21.97
Basic materials	847.22	0.48	-0.74	0.59	-1.85	-1.85	0.76 KWD	1.28	8.22
Health care	460.03	0.00	0.00	0.00	-0.39	-0.39	0.23 KWD	2.46	13.39
Consumer services	480.62	0.00	-0.21	0.43	0.14	0.14	0.74 KWD	0.91	12.06
Insurance	1,665.90	0.20	0.06	0.26	5.22	5.22	0.67 KWD	0.82	10.11
Consumer Disc	1,457.29	0.35	0.06	0.09	-1.95	-1.95	0.15 KWD	0.96	0.00
Energy	1,013.52	-0.10	-2.52	-0.34	-10.90	-10.90	0.21 KWD	0.55	4.53
Technology	672.21	-9.39	-4.62	-4.62	-7.21	-7.21	0.01 KWD	0.79	0.00
Utilities	476.32	0.00	-0.55	0.00	-3.19	-3.19	0.20 KWD	1.69	14.97



What Move the GCC markets

Oil Prices

Oil edged higher on Thursday, though gains made on signs of a strong economic rebound in top crude importer China were kept in check by fears over the impact of potential increases to European interest rates. Brent crude futures rose 58 cents, or 0.7%, to \$84.88 a barrel.

Kuwait Market

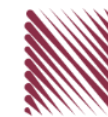
The market closed up today by + 0.42% at 7,330.69 value traded 31.3 million KD, Premier market value traded reached 26.6 million KD up by + 0.45% at 8,179.49.

KSA Market

The market closed up today by + 0.84% at 10,385.63.

DAILY MARKETSWRAP,

NIC RESEARCH AND STUDIES DEP



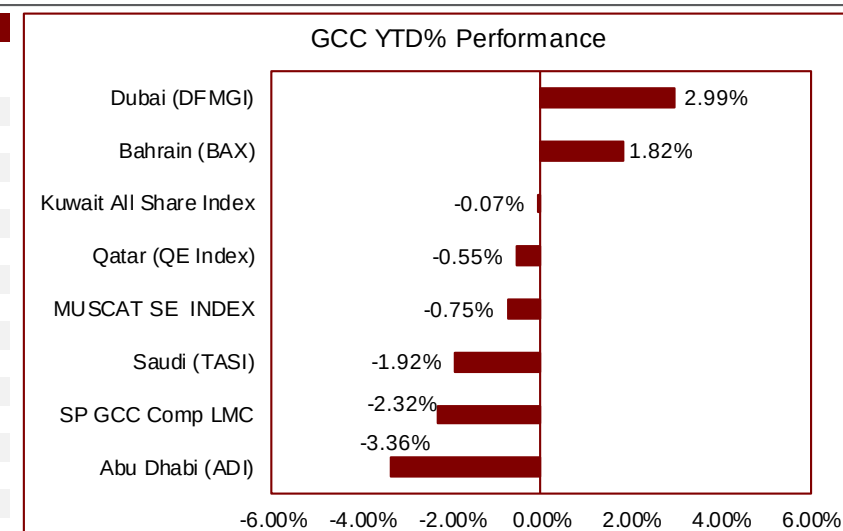
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.095	1.11	1.67	2.34	1.58	1.58	8.27 KWD	2.04	27.00
KFH	0.861	0.35	-0.81	0.47	4.62	4.62	11.56 KWD	1.96	32.00
Zain	0.556	0.00	0.54	-0.54	-1.24	-1.24	2.41 KWD	2.00	11.90
BOUBYAN BANK	0.760	0.26	0.26	-0.65	-4.76	-4.76	2.84 KWD	2.99	34.00
Agility	0.601	0.17	1.35	-0.33	-16.53	-16.53	1.61 KWD	1.11	39.28
Saudi Arabia									
ARAMCO	31.75	0.63	-0.16	-0.16	-1.09	-1.09	6,986.30 SAR	5.03	12.06
SABIC	90.40	1.46	-0.55	2.15	1.12	1.12	271.20 SAR	1.48	35.00
STC	35.95	0.70	3.60	2.28	-1.78	-1.78	179.75 SAR	2.44	14.64
AL-RAJHI BANK	73.70	2.22	1.94	4.84	-1.99	-1.99	294.85 SAR	2.94	18.49
NCB	46.60	-0.85	-2.61	-1.38	-7.72	-7.72	208.71 SAR	1.25	11.47
United Arab Emirates									
ETISALAT.AD	25.60	0.95	-0.08	0.39	11.99	11.99	206.60 AED	5.10	21.10
FAB.AD	14.12	0.43	0.14	0.28	-17.43	-17.43	155.77 AED	1.35	11.96
EMIRATES NBD	13.55	-0.37	1.50	-0.37	4.23	4.23	82.12 AED	0.88	6.85
DB ISLAMIC BK	5.73	-0.17	1.60	-0.17	0.53	0.53	41.20 AED	1.00	8.20
EMAAR PROPERT	5.58	-1.24	3.33	-0.36	-4.78	-4.78	50.20 AED	0.71	6.72
Qatar									
QNB	16.21	-2.29	0.62	-3.80	-9.94	-9.94	149.72 QAR	1.42	11.54
INDUSTRIES QAT	14.10	1.08	1.88	1.29	10.07	10.07	85.31 QAR	2.03	9.57
QA ISLAMIC BK	18.60	0.27	1.47	0.00	0.22	0.22	43.95 QAR	1.61	11.48
MASRAF AL RAYA	2.73	1.11	-0.33	1.11	-13.91	-13.91	25.39 QAR	1.05	17.13
MESAIEED PETRO	2.13	0.38	1.09	1.38	0.14	0.14	26.76 QAR	1.54	15.08
OMAN									
BANK MUSCAT	0.290	0.00	1.75	-0.68	5.45	5.45	2.18 OMR	0.98	8.33
OMANTEL	0.972	9.46	4.29	1.25	5.65	5.65	0.73 OMR	1.23	7.69
BANK DHOFAR	0.153	0.66	1.32	0.66	-12.57	-12.57	0.46 QAR	0.64	14.93
NAT BANK OF OMAN	0.274	1.48	3.79	3.01	-5.19	-5.19	0.45 QAR	0.70	12.71
OMINVEST	0.476	-0.83	13.33	4.39	13.33	13.33	0.32 QAR	0.95	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
22-Feb 23	24.76%	16.65%	0.06%	1.34%	0.42%	4.46%	17.71%	15.22%	5.84%	5.12%
1-March 23	24.76%	16.62%	0.06%	1.33%	0.42%	4.46%	17.72%	15.18%	5.84%	5.17%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.42 %The leading sector best performance indices today are Financial services 1.19 % Basic materials 0.48 % Banking 0.46 % respectively

KSA

Saudi Armco has a positive performance today by + 0.63 %, SABIC has a positive performance today by + 1.46 %, STC has a positive performance today by + 0.7 %, Al Rajhi Bank has a positive performance today by + 2.22 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.95 %, FAB.AD has a positive performance today by + 0.43 %



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