

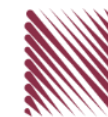


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, May 2nd 2023





Market Watch Tuesday, May 2, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,218.61	-0.59	2.32	-0.79	5.93	7.06	10,827 SAR	1.86	18.34
Qatar (QE Index)	10,331.82	0.58	2.40	1.48	1.17	-3.27	545 QAR	1.32	10.89
Dubai (DFMGI)	3,575.56	1.06	2.53	0.87	4.96	7.18	513 AED	1.24	23.82
Abu Dhabi (ADI)	9,669.13	-0.36	1.16	-1.23	2.53	-5.31	1,435 AED	1.76	20.80
Bahrain (BAX)	1,906.88	0.13	1.35	0.13	1.07	0.61	20 BHD	1.63	18.00
MUSCAT SE INDEX	4,725.78	-0.55	-1.77	0.16	-2.82	-2.71	5 OMR	1.04	13.25
SP GCC Comp LMC	180.08	-0.50	1.34	-0.86	3.69	0.73			
SP UAE PRICE INDEX	135.43	-0.20	2.28	-0.20	5.83	-1.50			

Developed Markets

MSCI World Index	2,803.07	-1.08	-0.92	-1.16	0.42	7.70			
U.S. (S&P 500)	4,119.58	-1.16	-0.64	-1.20	0.25	7.29			
U.K. (FTSE 100)	7,773.03	-1.24	-0.90	-1.24	1.85	4.31			
Japan (Topix)	2,075.53	-0.12	3.37	0.88	3.60	9.72			

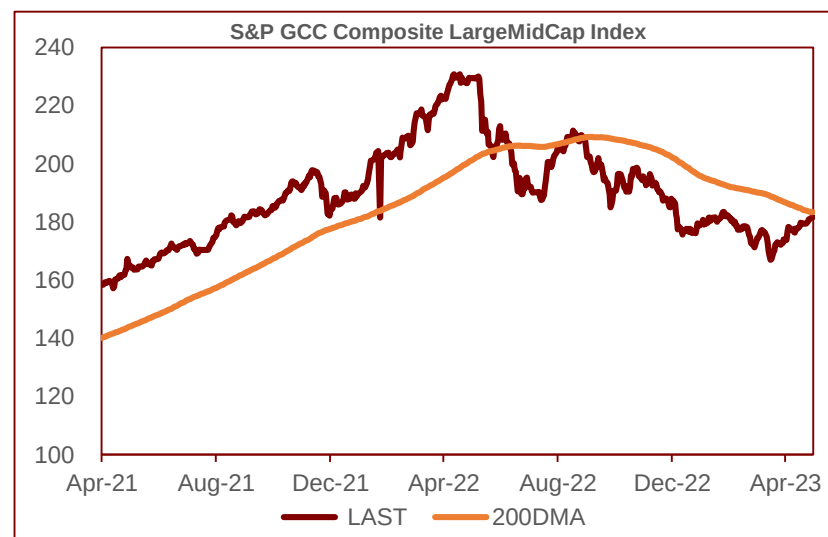
Emerging Markets

MSCI EM Index	973.94	-0.29	-2.32	-0.32	-1.65	1.84			
China (SSE Composite)	3,323.27	0.00	0.15	0.00	1.54	7.58			
India (Sensex)	61,354.71	0.40	1.53	0.40	4.01	0.84			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,046.42	-0.96	0.81	-1.34	-0.06	-3.37	45.61 KWD	1.66	20.61
Kuwait Premier Index	7,793.27	-1.10	0.45	-1.51	-0.36	-3.97	35.58 KWD	1.67	20.35
Kuwait Main Index	5,571.20	-0.35	2.41	-0.63	1.28	-0.46	10.03 KWD	1.60	21.60
NIC 50	8,870.01	-0.91	0.44	-1.52	-0.37	-2.35	28.60 KWD	1.65	19.35

Kuwait Sector

Banking	1,730.88	-1.05	0.32	-1.44	-1.25	-3.51	29.16 KWD	1.28	21.35
Telecom	1,163.91	-0.04	2.46	-0.91	2.80	-1.49	3.57 KWD	1.96	9.43
Industrials	985.36	-1.82	0.80	-2.00	-0.16	-8.67	3.45 KWD	0.81	18.72
Financial services	1,224.89	-0.06	1.11	-0.45	2.42	-2.57	3.57 KWD	0.74	21.70
Real estate	1,108.29	-2.19	-0.85	-3.15	2.60	-8.31	2.40 KWD	0.53	14.27
Basic materials	880.46	-0.34	5.17	-1.29	2.72	1.77	0.78 KWD	1.58	8.15
Health care	457.01	-0.85	-1.18	0.00	0.33	-1.05	0.23 KWD	1.03	10.16
Consumer services	455.63	-0.21	1.54	-0.28	2.32	-5.07	0.74 KWD	0.85	14.25
Insurance	2,103.72	-0.34	10.93	-0.47	10.14	35.65	0.85 KWD	0.77	10.00
Consumer Disc	1,468.69	-0.25	2.80	0.78	0.46	-1.22	0.14 KWD	0.91	0.00
Energy	1,001.86	-1.74	0.37	2.35	0.40	-12.00	0.21 KWD	0.63	4.65
Technology	622.01	0.00	-0.23	6.87	-2.17	-10.66	0.01 KWD	0.77	0.00
Utilities	465.79	0.57	0.57	1.14	0.00	-5.85	0.19 KWD	1.66	13.46



What Move the GCC markets

Oil Prices

Oil prices fell Tuesday, extending losses seen in the previous session, as weak economic data from China and expectations of a U.S. interest rate increase weigh on the market. Brent crude was down 0.5%, or 39 cents, to \$79.92 a barrel

Kuwait Market

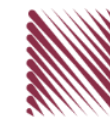
The market closed down today by – 0.96% at 7,046.42 value traded 42.2 million KD, Premier market value traded reached 37.0 million KD down by – 1.10% at 7,793.27.

KSA Market

The market closed down today by – 0.59 % at 11,218.61

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



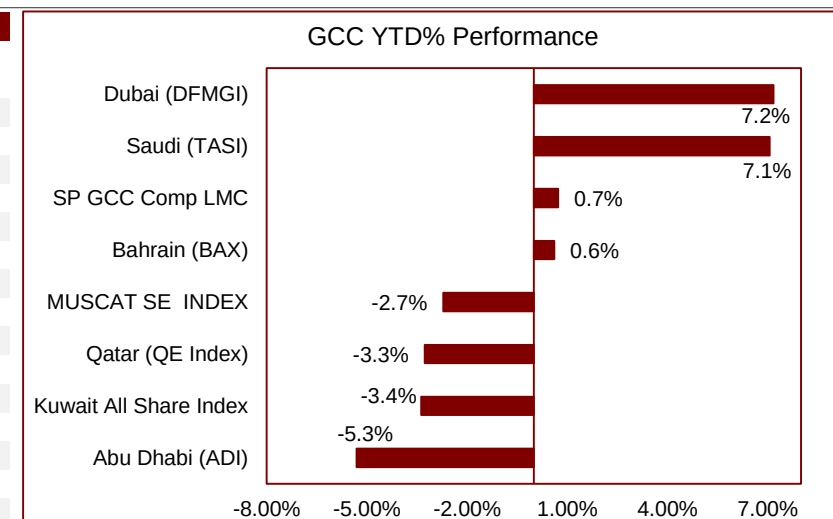
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.985	-1.60	2.28	-1.89	-2.06	-4.06	7.81 KWD	1.98	27.00
KFH	0.735	-0.68	-0.68	-0.81	-2.12	-1.76	10.85 KWD	1.87	32.00
Zain	0.556	0.00	1.09	-1.24	2.96	-1.24	2.41 KWD	1.96	12.28
BOUBYAN BANK	0.634	-2.61	0.63	-4.08	4.52	-15.78	2.51 KWD	2.83	34.00
Agility	0.605	-1.14	1.17	-1.79	-2.58	-15.97	1.62 KWD	0.96	23.31
Saudi Arabia									
ARAMCO	35.45	-1.66	7.91	-2.34	9.75	10.44	7,798.17 SAR	5.38	13.57
SABIC	90.50	-0.77	-0.77	-2.58	0.22	1.23	271.47 SAR	1.46	35.00
STC	44.00	-1.01	3.53	-0.90	9.86	20.22	219.98 SAR	2.98	18.23
AL-RAJHI BANK	75.20	-1.18	-0.53	-2.21	2.31	0.00	300.77 SAR	3.00	17.93
NCB	49.40	-0.50	-0.70	0.00	7.74	-2.18	221.19 SAR	1.32	11.93
United Arab Emirates									
ETISALAT.AD	23.20	0.00	-1.02	-3.33	5.17	1.49	206.60 AED	5.10	21.10
FAB.AD	13.94	-0.43	5.93	-1.69	8.23	-18.48	154.00 AED	1.37	13.13
EMIRATES NBD	14.00	0.36	7.69	-0.71	6.46	7.69	88.43 AED	0.92	5.29
DB ISLAMIC BK	5.57	1.09	4.90	0.18	6.50	-2.28	40.33 AED	1.00	7.75
EMAAR PROPERT	5.95	0.68	-0.34	0.34	6.25	1.54	52.59 AED	0.76	7.15
Qatar									
QNB	15.70	0.32	1.29	2.61	-2.30	-12.78	144.79 QAR	1.43	10.37
INDUSTRIES QAT	13.16	0.61	0.92	1.62	1.23	2.73	79.50 QAR	1.90	9.03
QA ISLAMIC BK	17.70	-0.28	-0.39	-1.06	-0.45	-4.63	41.76 QAR	1.57	10.81
MASRAF AL RAYA	2.71	2.65	0.59	3.55	-8.29	-14.54	25.16 QAR	1.07	20.61
MESAIEED PETRO	2.05	2.81	4.17	4.22	6.72	-3.67	25.70 QAR	1.48	14.56
OMAN									
BANK MUSCAT	0.269	-1.47	-2.18	-1.47	-2.18	-2.18	2.02 OMR	0.93	8.33
OMANTEL	0.992	11.71	-2.27	-0.80	-9.82	7.83	0.74 OMR	1.17	7.69
BANK DHOFAR	0.155	0.00	-3.13	0.00	-3.13	-11.43	0.46 QAR	0.65	14.93
NAT BANK OF OMAN	0.285	1.79	0.35	3.64	6.34	-1.38	0.46 QAR	0.72	12.71
OMINVEST	0.406	-3.79	-2.40	0.00	-18.15	-3.33	0.27 QAR	0.76	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
19-April 23	24.85%	16.25%	0.06%	1.38%	0.42%	4.67%	17.70%	14.29%	6.13%	5.07%
26-April 23	24.86%	16.22%	0.06%	1.38%	0.43%	4.66%	17.70%	14.24%	6.14%	5.07%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.96 %The leading sector bottom performance indices today are Real estate -2.19 % Industrials -1.82 % Energy -1.74 % respectively

KSA

Saudi Armco has a negative performance today by -1.66 %, SABIC has a negative performance today by -0.77 %, STC has a negative performance today by -1.01 %, Al Rajhi Bank have negative performance today by -1.18 %

U.A.E

ETISALAT .AD flat performance today , FAB.AD have negative performance today by -0.43 %



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