



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, March 30th 2023



DAILY MARKETS WRAP,

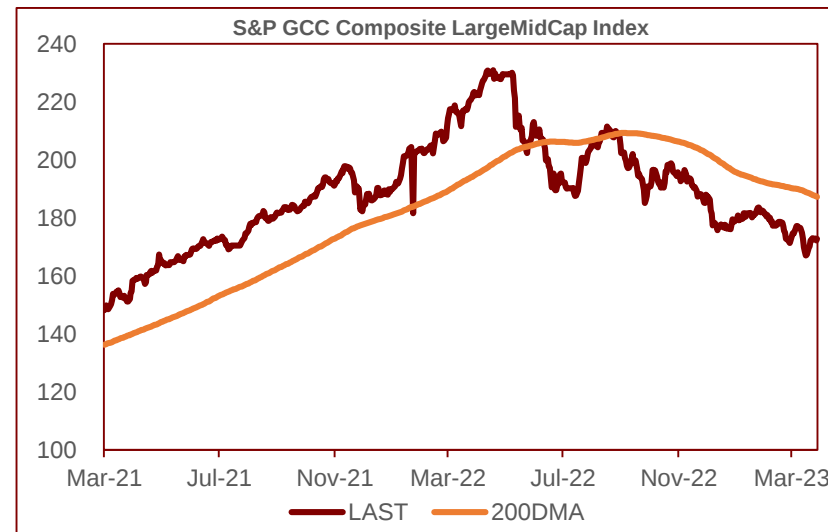
NIC RESEARCH AND STUDIES DEP



Market Watch

Thursday, March 30th 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,590.10	0.83	1.38	4.82	1.07	1.07	9,980 SAR	1.72	17.45
Qatar (QE Index)	10,212.61	-0.01	2.06	-3.39	-4.39	-4.39	519 QAR	1.25	11.10
Dubai (DFMGI)	3,406.72	0.73	1.83	-0.35	2.68	2.68	495 AED	1.18	19.11
Abu Dhabi (ADI)	9,430.25	0.24	-0.75	-3.72	-7.17	-7.17	1,435 AED	1.71	20.72
Bahrain (BAX)	1,886.61	-0.41	-0.63	-2.34	-0.46	-0.46	19 BHD	1.72	18.00
MUSCAT SE INDEX	4,863.09	0.18	-0.16	2.31	0.12	0.12	5 OMR	1.02	13.25
SP GCC Comp LMC	173.67	0.77	0.59	0.95	-2.64	-2.64			
SP UAE PRICE INDEX	127.97	0.24	-0.74	-5.00	-5.86	-5.86			
Developed Markets									
MSCI World Index	2,791.44	0.74	2.33	1.66	6.03	6.03			
U.S. (S&P 500)	4,109.31	0.57	2.59	2.03	5.50	5.50			
U.K. (FTSE 100)	7,631.74	0.74	1.61	-3.25	2.26	2.26			
Japan (Topix)	2,003.50	-0.61	1.33	-0.50	4.84	4.84			
Emerging Markets									
MSCI EM Index	990.28	0.57	0.82	2.26	3.07	3.07			
China (SSE Composite)	3,272.86	0.65	-0.77	-0.56	5.57	5.57			
India (Sensex)	58,991.52	0.00	0.06	-1.70	-4.73	-4.73			
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,050.76	0.40	0.00	-2.67	-3.31	-3.31	45.66 KWD	1.66	21.60
Kuwait Premier Index	7,821.74	0.46	0.12	-3.07	-3.62	-3.62	35.75 KWD	1.66	22.37
Kuwait Main Index	5,500.78	0.15	-0.54	-0.86	-1.72	-1.72	9.92 KWD	1.67	18.83
NIC 50	8,751.09	0.54	0.11	-3.08	-3.63	-3.66	28.60 KWD	1.64	21.37
Kuwait Sector									
Banking	1,752.85	0.42	0.12	-3.15	-2.29	-2.29	29.53 KWD	1.27	23.37
Telecom	1,132.26	-0.39	-1.53	-3.34	-4.16	-4.16	3.47 KWD	1.90	11.92
Industrials	986.94	0.87	0.57	-0.35	-8.52	-8.52	3.47 KWD	0.78	17.76
Financial services	1,195.97	0.80	0.16	-3.25	-4.87	-4.87	3.48 KWD	0.67	16.20
Real estate	1,080.19	0.39	-0.89	-5.41	-10.63	-10.63	2.35 KWD	0.51	17.10
Basic materials	857.16	0.75	2.74	1.55	-0.92	-0.92	0.76 KWD	1.33	7.95
Health care	455.49	0.00	0.00	-0.99	-1.38	-1.38	0.23 KWD	2.48	10.05
Consumer services	445.28	-0.46	-3.35	-6.96	-7.22	-7.22	0.73 KWD	0.85	12.44
Insurance	1,909.97	0.19	0.87	17.35	23.16	23.16	0.78 KWD	0.81	10.16
Consumer Disc	1,461.98	-0.17	-0.22	0.38	-1.67	-1.67	0.14 KWD	0.90	0.00
Energy	997.89	-1.25	0.33	-1.96	-12.35	-12.35	0.21 KWD	0.59	4.41
Technology	635.83	0.00	-5.00	-6.12	-8.67	-8.67	0.01 KWD	0.78	0.00
Utilities	465.79	1.73	0.57	-2.75	-5.85	-5.85	0.19 KWD	1.66	13.46



What Move the GCC markets

Oil Prices

Oil prices rose on Thursday as a surprise drop in U.S. crude stockpiles and a halt in exports from Iraq's Kurdistan region offset a smaller-than-expected cut to Russian supplies. Brent crude futures rose 58 cents, or 0.7%, to \$78.86 a barrel.

Kuwait Market

The market closed up today by + 0.40% at 7,050.76 value traded 51.9 million KD, Premier market value traded reached 47.7 million KD up by + 0.46% at 7,821.74.

KSA Market

The market closed up today by + 0.83% at 10,590.10.



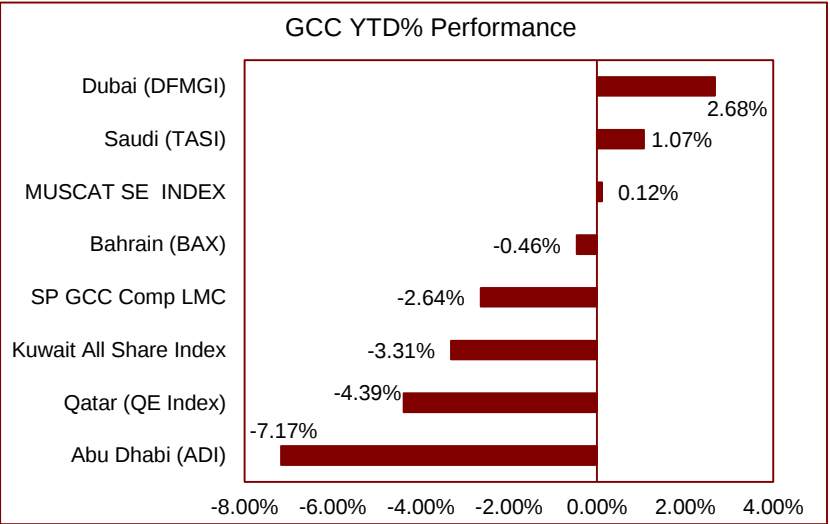
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.056	0.38	-0.38	-1.31	-2.04	-2.04	7.98 KWD	1.96	27.00
KFH	0.826	0.49	0.24	-3.62	0.36	0.36	11.09 KWD	1.88	32.00
Zain	0.540	-0.37	0.00	-3.40	-4.09	-4.09	2.34 KWD	1.90	11.92
BOUBYAN BANK	0.643	-0.46	-1.23	-15.95	-19.42	-19.42	2.40 KWD	2.53	34.00
Agility	0.621	1.47	1.31	2.99	-13.75	-13.75	1.66 KWD	1.15	40.59
Saudi Arabia									
ARAMCO	32.30	-0.31	0.47	1.57	0.62	0.62	7,103.73 SAR	4.90	12.19
SABIC	90.30	0.56	0.00	2.03	1.01	1.01	270.81 SAR	1.46	35.00
STC	40.05	-0.87	2.69	13.94	9.43	9.43	200.19 SAR	2.71	16.57
AL-RAJHI BANK	73.50	1.66	0.00	4.55	-2.26	-2.26	293.91 SAR	2.93	18.54
NCB	45.85	2.23	-1.29	-2.96	-9.21	-9.21	205.25 SAR	1.23	10.95
United Arab Emirates									
ETISALAT.AD	22.40	-1.15	-5.72	-12.16	-2.01	-2.01	206.60 AED	5.10	21.10
FAB.AD	13.12	0.77	-2.24	-6.82	-23.27	-23.27	142.29 AED	1.24	11.11
EMIRATES NBD	13.20	-0.75	2.72	-2.94	1.54	1.54	83.06 AED	0.89	6.67
DB ISLAMIC BK	5.36	0.00	-2.90	-6.62	-5.96	-5.96	37.87 AED	0.92	7.67
EMAAR PROPERT	5.72	2.33	3.62	2.14	-2.39	-2.39	49.50 AED	0.72	6.87
Qatar									
QNB	16.07	-0.74	1.01	-4.63	-10.72	-10.72	148.43 QAR	1.41	11.18
INDUSTRIES QAT	13.00	0.00	0.39	-6.61	1.48	1.48	78.65 QAR	1.87	8.92
QA ISLAMIC BK	17.78	-0.39	0.74	-4.41	-4.20	-4.20	42.01 QAR	1.54	11.01
MASRAF AL RAYA	2.96	2.96	13.26	9.44	-6.81	-6.81	27.48 QAR	1.14	18.75
MESAIEED PETRO	1.92	-1.34	-1.03	-8.61	-9.73	-9.73	24.12 QAR	1.39	13.65
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	0.496	-0.80	-0.80	8.77	18.10	18.10	0.33 QAR	0.93	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 up today by + 0.4 %The leading sector best performance indices today are Utilities 1.73 % Industrials 0.87 % Financial services 0.8 % respectively

KSA

Saudi Armco has a negative performance today by -0.31 %, SABIC has a positive performance today by + 0.55 %, STC has a negative performance today by -0.87 %, Al Rajhi Bank has a positive performance today by + 1.66 %

U.A.E

ETISALAT .AD have negative performance today by -1.15 %, FAB.AD has a positive performance today by + 0.77 %



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