

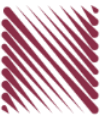


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

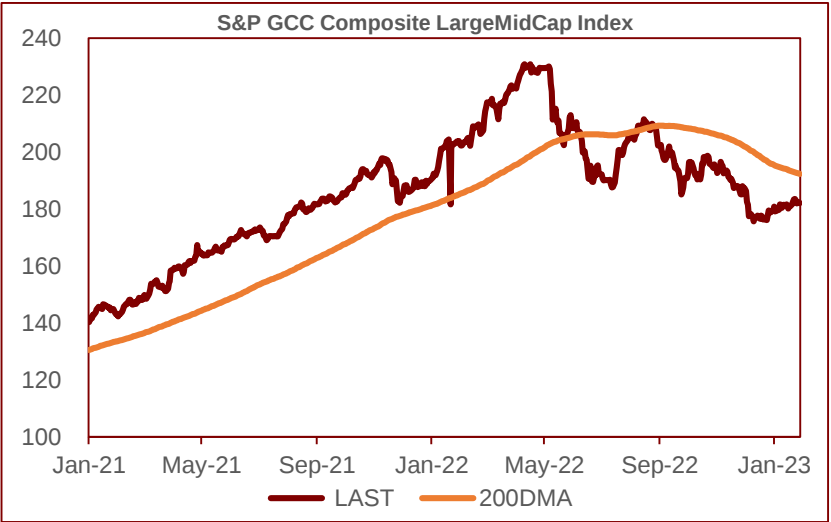
Tuesday, January 31th 2023





Market Watch Tuesday, January 31, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	10,792.85	-0.16	-0.27	3.00	3.00	3.00	10,145 SAR	1.75	15.35
Qatar (QE Index)	10,932.29	-1.72	-1.60	2.35	2.35	2.35	560 QAR	1.42	12.36
Dubai (DFMGI)	3,303.27	-0.01	-1.61	-0.98	-0.98	-0.98	477 AED	1.18	12.63
Abu Dhabi (ADI)	9,811.56	0.10	-1.89	-3.91	-3.91	-3.91	1,435 AED	1.95	19.16
Bahrain (BAX)	1,928.24	-0.12	0.03	1.74	1.74	1.74	20 BHD	1.66	15.08
MUSCAT SE INDEX	4,703.38	-0.99	-1.01	-3.17	-3.17	-3.17	5 OMR	0.94	13.25
SP GCC Comp LMC	181.41	-0.38	-0.86	1.47	1.47	1.47			
SP UAE PRICE INDEX	133.90	-0.05	-2.27	-2.62	-2.62	-2.62			
Developed Markets									
MSCI World Index	2,785.00	0.93	0.27	7.00	7.00	7.00			
U.S. (S&P 500)	4,076.60	1.46	0.40	6.18	6.18	6.18			
U.K. (FTSE 100)	7,771.70	-0.17	0.14	4.29	4.29	4.29			
Japan (Topix)	1,975.27	-0.36	-0.16	4.42	4.42	4.42			
Emerging Markets									
MSCI EM Index	1,031.50	-1.20	-1.99	7.85	7.85	7.85			
China (SSE Composite)	3,255.67	-0.42	-0.28	5.39	5.39	5.39			
India (Sensex)	59,549.90	0.08	-1.09	-2.12	-2.12	-2.12			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	7,277.29	-0.06	-0.47	-0.20	-0.20	-0.20	47.03 KWD	2.11	29.05
Kuwait Premier Index	8,085.41	0.02	-0.34	-0.37	-0.37	-0.37	36.97 KWD	2.24	24.51
Kuwait Main Index	5,623.36	-0.35	-0.96	0.47	0.47	0.47	10.06 KWD	1.65	45.82
NIC 50	9,101.52	-0.47	-0.35	-0.38	-0.38	6.79	28.60 KWD	2.22	23.51
Kuwait Sector									
Banking	1,813.34	0.07	-0.27	1.08	1.08	1.08	30.51 KWD	1.37	25.51
Telecom	1,197.64	-1.82	-1.85	1.37	1.37	1.37	3.67 KWD	1.99	11.86
Industrials	979.86	0.21	-0.42	-9.18	-9.18	-9.18	3.44 KWD	0.78	18.21
Financial services	1,253.83	0.17	-1.02	-0.27	-0.27	-0.27	3.56 KWD	0.72	16.38
Real estate	1,188.84	0.32	0.39	-1.64	-1.64	-1.64	2.58 KWD	0.59	23.56
Basic materials	863.11	0.09	0.28	-0.23	-0.23	-0.23	0.77 KWD	1.28	8.36
Health care	443.69	0.00	0.00	-3.93	-3.93	-3.93	0.22 KWD	2.47	11.92
Consumer services	479.60	-0.35	-3.11	-0.07	-0.07	-0.07	0.71 KWD	0.93	11.39
Insurance	1,553.69	0.03	-0.66	0.19	0.19	0.19	0.64 KWD	0.82	9.50
Consumer Disc	1,403.73	-0.17	-0.51	-5.59	-5.59	-5.59	0.15 KWD	0.96	0.00
Energy	1,098.50	0.67	-4.41	-3.52	-3.52	-3.52	0.23 KWD	0.63	4.90
Technology	695.49	0.00	0.63	-0.10	-0.10	-0.10	0.01 KWD	0.85	0.00
Utilities	478.95	0.00	0.00	-3.19	-3.19	-3.19	0.20 KWD	1.69	14.97



What Move the GCC markets

Oil Prices

Oil prices steadied in early Asian trade on Tuesday after falling by more than 2% in the previous session on the threat of further interest rate hikes and continued Russian crude flows. Brent crude futures gained 28 cents to \$85.18 per barrel.

Kuwait Market

The market closed down today by – 0.06% at 7,277.29 value traded 44.4 million KD, Premier market value traded reached 36.0 million KD up by + 0.02% at 8,085.41.

KSA Market

The market closed down today by – 0.16% at 10,792.85.



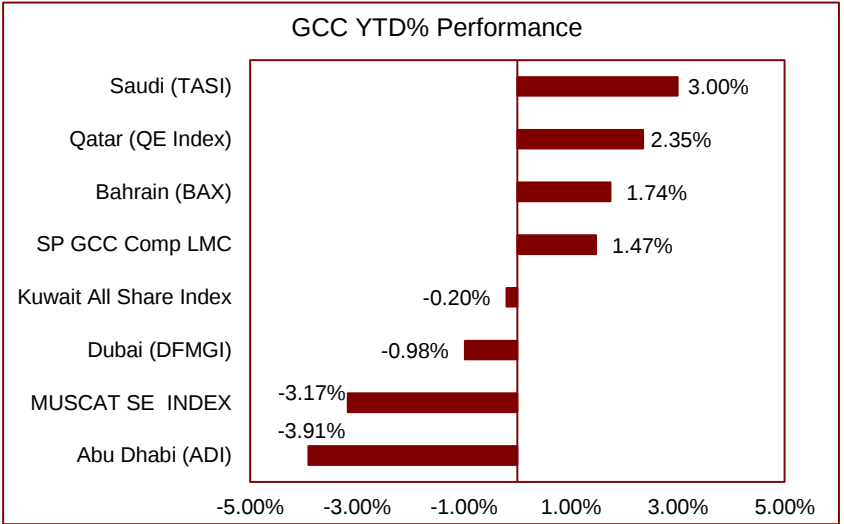
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.097	-1.17	-0.36	1.76	1.76	1.76	8.28 KWD	2.04	27.00
KFH	0.836	1.21	0.36	1.58	1.58	1.58	11.22 KWD	3.45	32.00
Zain	0.554	-1.07	-1.25	-1.60	-1.60	-1.60	2.40 KWD	1.99	11.86
BOUBYAN BANK	0.784	-0.38	-2.24	-1.75	-1.75	-1.75	2.93 KWD	3.09	34.00
Agility	0.591	1.20	-0.51	-17.92	-17.92	-17.92	1.58 KWD	1.09	38.63
Saudi Arabia									
ARAMCO	32.95	-0.15	0.15	2.65	2.65	2.65	7,247.07 SAR	5.22	12.61
SABIC	92.70	-1.80	-2.83	3.69	3.69	3.69	278.03 SAR	1.52	35.00
STC	36.90	-1.47	-1.47	0.82	0.82	0.82	184.45 SAR	2.51	15.55
AL-RAJHI BANK	82.00	0.12	1.36	9.04	9.04	9.04	327.91 SAR	3.81	21.11
NCB	47.30	0.21	-1.97	-6.34	-6.34	-6.34	211.75 SAR	1.29	11.38
United Arab Emirates									
ETISALAT.AD	25.70	-0.54	0.55	12.42	12.42	12.42	206.60 AED	5.10	21.10
FAB.AD	13.60	0.00	-4.76	-20.47	-20.47	-20.47	150.25 AED	1.31	11.52
EMIRATES NBD	12.95	0.78	-0.38	-0.38	-0.38	-0.38	81.80 AED	0.88	6.54
DB ISLAMIC BK	5.55	-2.97	-1.77	-2.63	-2.63	-2.63	40.19 AED	0.97	7.94
EMAAR PROPERT	5.56	-0.71	-4.30	-5.12	-5.12	-5.12	49.14 AED	0.70	6.40
Qatar									
QNB	18.00	-2.96	-2.65	0.00	0.00	0.00	166.48 QAR	1.58	12.53
INDUSTRIES QAT	14.05	0.72	1.59	9.68	9.68	9.68	85.12 QAR	2.10	8.95
QA ISLAMIC BK	19.67	-2.14	-0.91	5.98	5.98	5.98	46.54 QAR	1.71	12.18
MASRAF AL RAYA	2.73	-5.54	-11.02	-13.91	-13.91	-13.91	25.42 QAR	1.05	17.32
MESAIEED PETRO	2.15	-3.28	-3.41	1.08	1.08	1.08	27.05 QAR	1.57	14.26
OMAN									
BANK MUSCAT	0.276	-0.36	0.36	0.36	0.36	0.36	2.07 OMR	0.95	8.33
OMANTEL	0.948	6.76	0.00	3.04	3.04	3.04	0.71 OMR	1.20	7.69
BANK DHOFAR	0.150	-3.23	-6.25	-14.29	-14.29	-14.29	0.45 QAR	0.63	14.93
NAT BANK OF OMAN	0.274	-5.19	-5.52	-5.19	-5.19	-5.19	0.45 QAR	0.77	12.71
OMINVEST	0.418	0.48	0.00	-0.48	-0.48	-0.48	0.28 QAR	0.83	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
18-Jan 23	24.67%	17.07%	0.06%	1.33%	0.37%	4.50%	17.67%	12.29%	5.86%	5.16%
25-Jan 23	24.69%	16.88%	0.06%	1.34%	0.37%	4.74%	17.67%	15.21%	5.86%	5.17%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.06 %The leading sector bottom performance indices today are Telecom -1.82 % Consumer services -0.35 % Consumer Disc -0.17 % respectively

KSA

Saudi Armco has a negative performance today by -0.15 %, SABIC has a negative performance today by -1.80 %, STC has a negative performance today by -1.47 %, Al Rajhi Bank has a positive performance today by + 0.12 %

U.A.E

ETISALAT .AD has a negative performance today by -0.54 %, FAB.AD has a flat performance today



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