



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, May 31th 2023



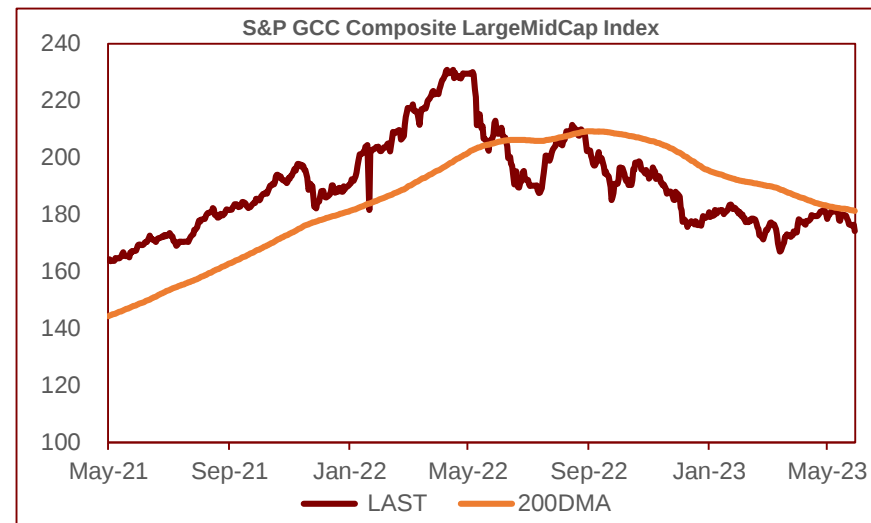


Market Watch

Wednesday, May 31, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,014.13	-1.13	-1.52	-2.60	4.00	5.11	10,589 SAR	2.03	17.90
Qatar (QE Index)	10,154.81	-1.78	-2.88	-0.26	-0.57	-4.93	543 QAR	1.36	11.23
Dubai (DFMGI)	3,576.63	0.26	1.44	0.90	4.99	7.21	509 AED	1.36	17.27
Abu Dhabi (ADI)	9,406.57	-0.82	0.06	-3.91	-0.25	-7.88	1,435 AED	1.77	20.40
Bahrain (BAX)	1,963.51	0.03	0.06	3.10	4.08	3.60	20 BHD	1.65	17.65
MUSCAT SE INDEX	4,626.40	0.17	-0.33	-1.94	-4.87	-4.76	5 OMR	0.99	13.25
SP GCC Comp LMC	174.22	-1.29	-1.34	-4.08	0.32	-2.55			
SP UAE PRICE INDEX	130.91	-1.14	0.79	-4.78	2.30	-4.79			
Developed Markets									
MSCI World Index	2,800.56	-0.89	0.13	-1.25	0.33	7.60			
U.S. (S&P 500)	4,179.83	-0.61	0.69	0.25	1.72	8.86			
U.K. (FTSE 100)	7,446.14	-1.01	-1.65	-5.39	-2.43	-0.08			
Japan (Topix)	2,130.63	-1.32	-0.72	3.56	6.35	12.63			
Emerging Markets									
MSCI EM Index	958.53	-1.22	-0.57	-1.90	-3.21	0.22			
China (SSE Composite)	3,204.56	-0.61	0.10	-3.57	-2.09	3.73			
India (Sensex)	62,622.24	-0.55	1.21	2.47	6.15	2.93			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,796.79	-0.63	0.47	-4.84	-3.60	-6.79	44.06 KWD	1.65	17.35
Kuwait Premier Index	7,494.65	-0.87	0.41	-5.28	-4.18	-7.65	34.23 KWD	1.59	17.09
Kuwait Main Index	5,440.77	0.30	0.67	-2.95	-1.09	-2.79	9.83 KWD	1.84	18.26
NIC 50	8,590.37	-0.01	0.40	-5.29	-4.19	-5.43	28.60 KWD	1.57	16.09
Kuwait Sector									
Banking	1,650.50	-1.14	-0.16	-6.02	-5.84	-7.99	27.91 KWD	1.19	18.09
Telecom	1,096.38	0.76	2.77	-6.66	-3.17	-7.20	3.37 KWD	1.33	8.60
Industrials	967.46	-0.26	0.74	-3.78	-1.97	-10.33	3.41 KWD	0.79	19.61
Financial services	1,184.17	-0.14	1.11	-3.76	-0.99	-5.81	3.40 KWD	0.68	18.98
Real estate	1,114.91	-0.22	1.24	-2.57	3.21	-7.76	2.42 KWD	0.54	20.92
Basic materials	918.66	0.39	2.04	2.99	7.17	6.19	0.80 KWD	1.54	5.72
Health care	458.82	0.00	0.00	0.40	0.73	-0.66	0.23 KWD	0.98	6.83
Consumer services	503.12	-2.84	-3.17	10.11	12.99	4.83	0.77 KWD	0.88	13.98
Insurance	2,136.21	0.07	-0.36	1.06	11.85	37.75	0.88 KWD	0.76	8.71
Consumer Disc	1,539.92	1.53	3.53	5.67	5.33	3.57	0.15 KWD	0.95	0.00
Energy	989.97	2.00	-0.80	1.14	-0.79	-13.05	0.21 KWD	0.68	4.20
Technology	690.40	-3.06	18.77	18.63	8.58	-0.84	0.01 KWD	0.86	0.00
Utilities	484.21	0.55	1.10	5.14	3.95	-2.13	0.20 KWD	1.85	15.07



What Move the GCC markets

Oil Prices

Oil prices dipped in early trade on Thursday for the third straight session after data showed an unexpected, large build in U.S. crude stocks last week, triggering fears of an oversupply amid signs of weaker Chinese demand, too. Brent crude futures for August delivery fell 40 cents, or 0.6% to \$72.20 a barrel

Kuwait Market

The market closed down today by - 0.63% at 6,796.79 value traded 88.6 million KD, Premier market value traded reached 74.5 million KD down by - 0.87% at 7,494.65

KSA Market

The market closed down today by - 0.113% at 11,014.13.

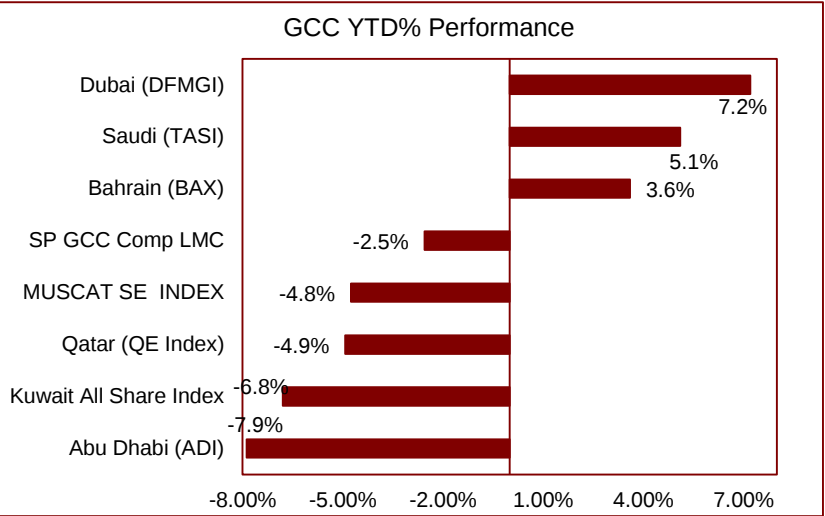


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.920	-1.71	-0.33	-8.37	-8.52	-10.39	7.30 KWD	1.85	27.00
KFH	0.707	-1.39	-0.28	-4.59	-5.85	-5.50	10.44 KWD	1.80	32.00
Zain	0.520	0.97	2.77	-7.64	-3.70	-7.64	2.25 KWD	1.75	11.09
BOUBYAN BANK	0.600	-0.33	0.67	-9.23	-1.09	-20.30	2.38 KWD	2.68	34.00
Agility	0.611	-0.97	0.99	-0.81	-1.61	-15.14	1.64 KWD	0.86	22.03
Saudi Arabia									
ARAMCO	31.50	-1.10	-1.25	-4.55	7.28	7.94	7,624.42 SAR	5.11	13.71
SABIC	88.20	-2.11	-2.11	-5.06	-2.33	-1.34	264.65 SAR	1.42	35.00
STC	43.25	2.98	1.41	-2.59	7.99	18.17	216.29 SAR	2.89	17.13
AL-RAJHI BANK	70.70	-1.26	-2.88	-8.06	-3.81	-5.98	282.85 SAR	2.85	16.69
NCB	36.90	-0.81	-1.73	0.09	7.83	-2.09	221.44 SAR	1.28	12.01
United Arab Emirates									
ETISALAT.AD	23.08	-2.70	1.50	-3.83	4.62	0.96	206.60 AED	5.10	21.10
FAB.AD	12.70	-1.24	-1.55	-10.44	-1.40	-25.73	140.29 AED	1.25	11.96
EMIRATES NBD	13.65	-0.73	0.37	-3.19	3.80	5.00	86.21 AED	0.90	5.16
DB ISLAMIC BK	5.26	-0.19	1.74	-5.40	0.57	-7.72	38.08 AED	0.94	7.31
EMAAR PROPERT	6.15	2.67	5.13	3.71	9.82	4.95	54.35 AED	0.76	6.48
Qatar									
QNB	16.01	-1.78	-2.97	4.64	-0.37	-11.06	147.75 QAR	1.45	10.57
INDUSTRIES QAT	11.98	-4.39	-6.19	-7.49	-7.85	-6.48	72.42 QAR	1.98	9.96
QA ISLAMIC BK	17.52	-1.02	-1.63	-2.07	-1.46	-5.60	41.36 QAR	1.55	10.70
MASRAF AL RAYA	2.55	-0.47	-4.35	-2.56	-13.71	-19.58	23.69 QAR	1.01	19.39
MESAIEED PETRO	1.97	-1.10	-1.75	0.15	2.55	-7.43	24.72 QAR	1.52	15.53
OMAN									
BANK MUSCAT	0.262	0.38	1.16	-4.03	-4.73	-4.73	1.97 OMR	0.91	8.33
OMANTEL	0.964	8.56	0.42	-3.60	-12.36	4.78	0.72 OMR	1.19	7.69
BANK DHOFAR	0.175	0.00	-0.57	12.90	9.38	0.00	0.52 QAR	0.74	14.93
NAT BANK OF OMAN	0.273	1.11	1.11	-0.73	1.87	-5.54	0.44 QAR	0.69	12.71
OMINVEST	0.370	0.00	-2.63	-8.87	-25.40	-11.90	0.25 QAR	0.69	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
17-May 23	24.73%	15.98%	0.06%	1.35%	0.23%	4.62%	17.67%	14.04%	6.07%	4.96%
24-May 23	24.55%	15.75%	0.06%	1.35%	0.23%	4.61%	17.69%	14.02%	6.09%	4.96%

End of Report
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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is down today by -0.63 %The leading sector bottom performance indices today are Technology -3.06 % Consumer services -2.84 % Banking -1.14 % respectively

KSA
Saudi Armco have negative performance today by -1.1 %, SABIC have negative performance today by -2.1%. . STC has a positive performance today by + 2.98 %, Al Rajhi Bank have negative performance today by -1.26 %

U.A.E
ETISALAT .AD have negative performance today by -2.7 %, FAB.AD have negative performance today by -1.24 %.



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