

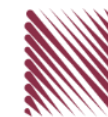


شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Wednesday, May 3<sup>rd</sup> 2023





### Market Watch

Wednesday, May 3, 2023

| Description        | Close     | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|--------------------|-----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>GCC Markets</b> |           | %     | %     | %     | %     | %     |               |      |       |
| Saudi (TASI)       | 11,073.17 | -1.30 | 0.99  | -2.07 | 4.56  | 5.68  | 10,703 SAR    | 1.82 | 18.03 |
| Qatar (QE Index)   | 10,485.09 | 1.48  | 3.92  | 2.98  | 2.67  | -1.83 | 557 QAR       | 1.38 | 11.04 |
| Dubai (DFMGI)      | 3,577.77  | 0.06  | 2.59  | 0.93  | 5.02  | 7.25  | 513 AED       | 1.25 | 23.68 |
| Abu Dhabi (ADI)    | 9,644.95  | -0.25 | 0.91  | -1.47 | 2.28  | -5.54 | 1,435 AED     | 1.75 | 20.80 |
| Bahrain (BAX)      | 1,902.38  | -0.24 | 1.11  | -0.11 | 0.84  | 0.38  | 20 BHD        | 1.63 | 18.00 |
| MUSCAT SE INDEX    | 4,728.33  | 0.05  | -1.72 | 0.22  | -2.77 | -2.66 | 5 OMR         | 1.03 | 13.25 |
| SP GCC Comp LMC    | 178.52    | -0.87 | 0.47  | -1.72 | 2.79  | -0.14 |               |      |       |
| SP UAE PRICE INDEX | 134.88    | -0.41 | 1.86  | -1.89 | 5.40  | -1.90 |               |      |       |

### Developed Markets

|                  |          |       |       |       |       |      |  |  |  |
|------------------|----------|-------|-------|-------|-------|------|--|--|--|
| MSCI World Index | 2,796.31 | -0.24 | -1.16 | -1.40 | 0.17  | 7.44 |  |  |  |
| U.S. (S&P 500)   | 4,090.75 | -0.70 | -1.34 | -1.89 | -0.45 | 6.54 |  |  |  |
| U.K. (FTSE 100)  | 7,788.37 | 0.20  | -0.70 | -1.04 | 2.05  | 4.52 |  |  |  |
| Japan (Topix)    | 2,075.53 | 0.00  | 3.37  | 0.88  | 3.60  | 9.72 |  |  |  |

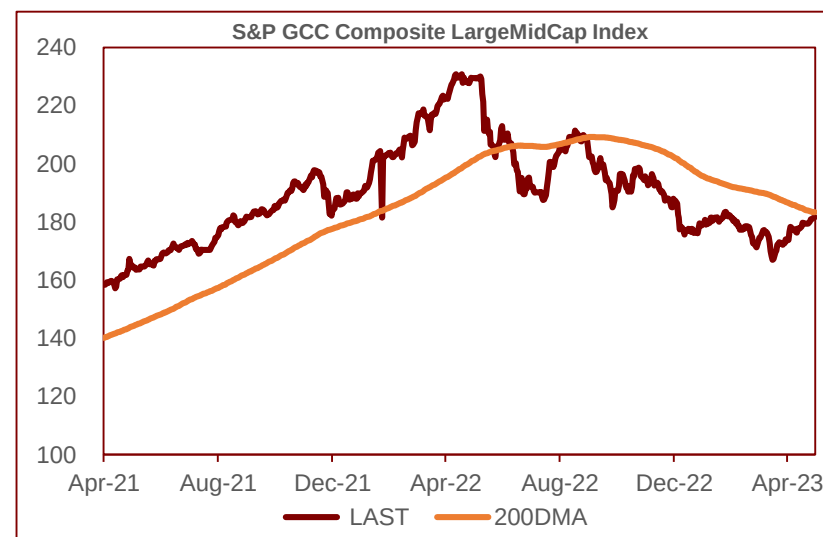
### Emerging Markets

|                       |           |       |       |       |       |      |  |  |  |
|-----------------------|-----------|-------|-------|-------|-------|------|--|--|--|
| MSCI EM Index         | 969.62    | -0.44 | -2.75 | -0.76 | -2.09 | 1.38 |  |  |  |
| China (SSE Composite) | 3,323.27  | 0.00  | 0.15  | 0.00  | 1.54  | 7.58 |  |  |  |
| India (Sensex)        | 61,193.30 | -0.26 | 1.26  | 0.13  | 3.73  | 0.58 |  |  |  |

| Description            | Close    | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|------------------------|----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>Kuwait</b>          |          | %     | %     | %     | %     | %     |               |      |       |
| Kuwait All Share Index | 6,995.30 | -0.73 | 0.08  | -2.06 | -0.79 | -4.07 | 45.24 KWD     | 1.68 | 20.50 |
| Kuwait Premier Index   | 7,722.95 | -0.90 | -0.46 | -2.40 | -1.26 | -4.84 | 35.25 KWD     | 1.67 | 20.20 |
| Kuwait Main Index      | 5,573.80 | 0.05  | 2.46  | -0.58 | 1.33  | -0.41 | 10.00 KWD     | 1.72 | 21.59 |
| NIC 50                 | 8,805.36 | -0.73 | -0.47 | -2.41 | -1.27 | -3.06 | 28.60 KWD     | 1.65 | 19.20 |

### Kuwait Sector

|                    |          |       |       |       |       |        |           |      |       |
|--------------------|----------|-------|-------|-------|-------|--------|-----------|------|-------|
| Banking            | 1,718.50 | -0.72 | -0.39 | -2.15 | -1.96 | -4.20  | 28.92 KWD | 1.27 | 21.20 |
| Telecom            | 1,160.41 | -0.30 | 2.15  | -1.21 | 2.49  | -1.78  | 3.56 KWD  | 1.96 | 9.38  |
| Industrials        | 975.88   | -0.96 | -0.17 | -2.95 | -1.12 | -9.55  | 3.43 KWD  | 0.79 | 18.34 |
| Financial services | 1,212.23 | -1.03 | 0.07  | -1.48 | 1.36  | -3.58  | 3.52 KWD  | 0.72 | 21.54 |
| Real estate        | 1,100.47 | -0.71 | -1.55 | -3.83 | 1.88  | -8.96  | 2.38 KWD  | 0.52 | 13.69 |
| Basic materials    | 868.29   | -1.38 | 3.72  | -2.66 | 1.30  | 0.37   | 0.77 KWD  | 1.56 | 8.02  |
| Health care        | 457.01   | 0.00  | -1.18 | 0.00  | 0.33  | -1.05  | 0.23 KWD  | 1.03 | 10.16 |
| Consumer services  | 451.23   | -0.97 | 0.56  | -1.25 | 1.34  | -5.98  | 0.73 KWD  | 0.85 | 14.37 |
| Insurance          | 2,108.53 | 0.23  | 11.19 | -0.25 | 10.40 | 35.96  | 0.86 KWD  | 0.76 | 10.00 |
| Consumer Disc      | 1,450.25 | -1.26 | 1.51  | -0.48 | -0.80 | -2.46  | 0.14 KWD  | 0.90 | 0.00  |
| Energy             | 985.06   | -1.68 | -1.32 | 0.64  | -1.29 | -13.48 | 0.21 KWD  | 0.69 | 4.61  |
| Technology         | 591.46   | -4.91 | -5.13 | 1.63  | -6.98 | -15.05 | 0.01 KWD  | 0.73 | 0.00  |
| Utilities          | 468.42   | 0.56  | 1.14  | 1.71  | 0.56  | -5.32  | 0.20 KWD  | 1.67 | 13.54 |



### What Move the GCC markets

#### Oil Prices

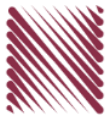
Oil prices extended losses on Wednesday after plunging 5% in the previous session, as investors fretted about the health of the U.S. economy ahead of an expected Federal Reserve interest rate hike later in the day. Brent futures fell \$1.88, or 2.5%, to \$73.44 a barrel.

#### Kuwait Market

The market closed down today by – 0.73% at 6,995.30 value traded 30.4 million KD, Premier market value traded reached 37.0 million KD down by – 0.90% at 7,722.95.

#### KSA Market

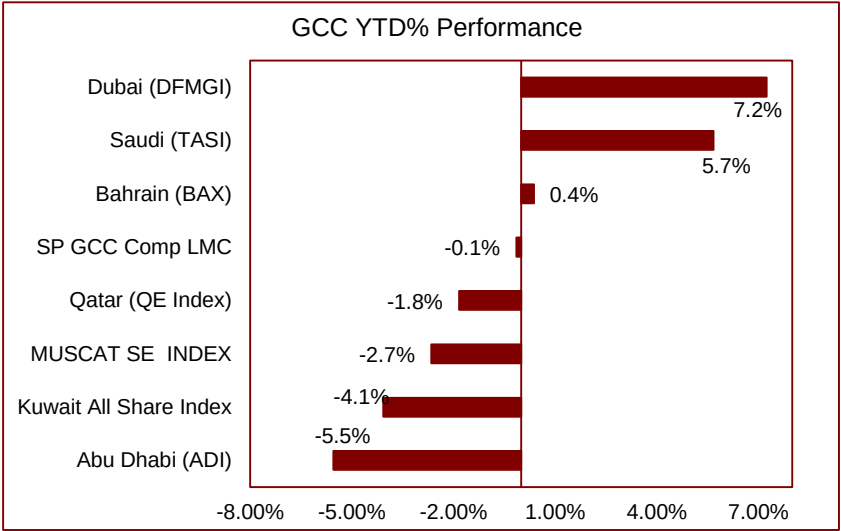
The market closed down today by – 1.30 % at 11,073.17



| Description          | Close  | Day Δ  | WTD   | MTD   | QTD     | YTD    | M Cap (in Bn) | PBV    | PE    |       |
|----------------------|--------|--------|-------|-------|---------|--------|---------------|--------|-------|-------|
| Blue Chip Watch      |        | %      | %     | %     | %       | %      |               |        |       |       |
| Kuwait               |        |        |       |       |         |        |               |        |       |       |
| NBK                  | 0.967  | -1.83  | 0.42  | -3.69 | -3.85   | -5.81  | 7.66 KWD      | 1.94   | 27.00 |       |
| KFH                  | 0.730  | -0.68  | -1.35 | -1.48 | -2.78   | -2.43  | 10.77 KWD     | 1.86   | 32.00 |       |
| Zain                 | 0.556  | 0.00   | 1.09  | -1.24 | 2.96    | -1.24  | 2.40 KWD      | 1.96   | 12.28 |       |
| BOUBYAN BANK         | 0.632  | -0.32  | 0.32  | -4.39 | 4.19    | -16.05 | 2.50 KWD      | 2.82   | 34.00 |       |
| Agility              | 0.601  | -0.66  | 0.50  | -2.44 | -3.22   | -16.53 | 1.61 KWD      | 0.96   | 23.15 |       |
| Saudi Arabia         |        |        |       |       |         |        |               |        |       |       |
| ARAMCO               | 35.10  | -0.99  | 6.85  | -3.31 | 8.67    | 9.35   | 7,717.06 SAR  | 5.33   | 13.34 |       |
| SABIC                | 89.90  | -0.66  | -1.43 | -3.23 | -0.44   | 0.56   | 269.53 SAR    | 1.45   | 35.00 |       |
| STC                  | 42.55  | -3.30  | 0.12  | -4.17 | 6.24    | 16.26  | 212.61 SAR    | 2.88   | 18.05 |       |
| AL-RAJHI BANK        | 74.10  | -1.46  | -1.98 | -3.64 | 0.82    | -1.46  | 296.21 SAR    | 2.96   | 17.72 |       |
| NCB                  | 49.70  | 0.61   | -0.10 | 0.61  | 8.40    | -1.58  | 222.41 SAR    | 1.33   | 11.87 |       |
| United Arab Emirates |        |        |       |       |         |        |               |        |       |       |
| ETISALAT.AD          | 23.22  | 0.09   | -0.94 | -3.25 | 5.26    | 1.57   | 206.60 AED    | 5.10   | 21.10 |       |
| FAB.AD               | 13.82  | -0.86  | 5.02  | -2.54 | 7.30    | -19.18 | 152.68 AED    | 1.36   | 13.01 |       |
| EMIRATES NBD         | 14.00  | 0.00   | 7.69  | -0.71 | 6.46    | 7.69   | 88.43 AED     | 0.92   | 5.29  |       |
| DB ISLAMIC BK        | 5.55   | -0.36  | 4.52  | -0.18 | 6.12    | -2.63  | 40.19 AED     | 0.99   | 7.72  |       |
| EMAAR PROPERT        | 5.94   | -0.17  | -0.50 | 0.17  | 6.07    | 1.37   | 52.50 AED     | 0.76   | 7.13  |       |
| Qatar                |        |        |       |       |         |        |               |        |       |       |
| QNB                  | 16.26  | 3.57   | 4.90  | 6.27  | 1.18    | -9.67  | 150.18 QAR    | 1.48   | 10.73 |       |
| INDUSTRIES QAT       | 13.35  | 1.44   | 2.38  | 3.09  | 2.69    | 4.22   | 80.77 QAR     | 1.92   | 9.16  |       |
| QA ISLAMIC BK        | 17.85  | 0.85   | 0.45  | -0.22 | 0.39    | -3.83  | 42.18 QAR     | 1.58   | 10.91 |       |
| MASRAF AL RAYA       | 2.68   | -0.96  | -0.37 | 2.56  | -9.17   | -15.36 | 24.96 QAR     | 1.06   | 20.41 |       |
| MESAIEED PETRO       | 2.05   | 0.05   | 4.22  | 4.27  | 6.77    | -3.62  | 25.75 QAR     | 1.48   | 14.57 |       |
| OMAN                 |        |        |       |       |         |        |               |        |       |       |
| BANK MUSCAT          | 0.271  | 0.74   | -1.45 | -0.73 | -1.45   | -1.45  | 2.03 OMR      | 0.94   | 8.33  |       |
| OMANTEL              | 0.984  | 10.81  | -3.05 | -1.60 | -10.55  | 6.96   | 0.74 OMR      | 1.16   | 7.69  |       |
| BANK DHOFAR          | 0.158  | 1.94   | -1.25 | 1.94  | -1.25   | -9.71  | 0.47 QAR      | 0.66   | 14.93 |       |
| NAT BANK OF OMAN     | 0.287  | 0.70   | 1.06  | 4.36  | 7.09    | -0.69  | 0.47 QAR      | 0.72   | 12.71 |       |
| OMINVEST             | 0.402  | -0.99  | -3.37 | -0.99 | -18.95  | -4.29  | 0.27 QAR      | 0.75   | 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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Leading Sector, Security Performance

**Kuwait**  
The market is down today by -0.73 %The leading sector bottom performance indices today are Technology -4.91 % Energy -1.68 % Basic materials -1.38 % respectively

**KSA**  
Saudi Armco have negative performance today by -0.99 %, SABIC have negative performance today by -0.66 %, STC has a negative performance today by -3.3 %, Al Rajhi Bank have negative performance today by -1.46 %

**U.A.E**  
ETISALAT .AD has a positive performance today by + 0.09 %, FAB.AD have negative performance today by -0.86 %



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