



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, April 4th 2023

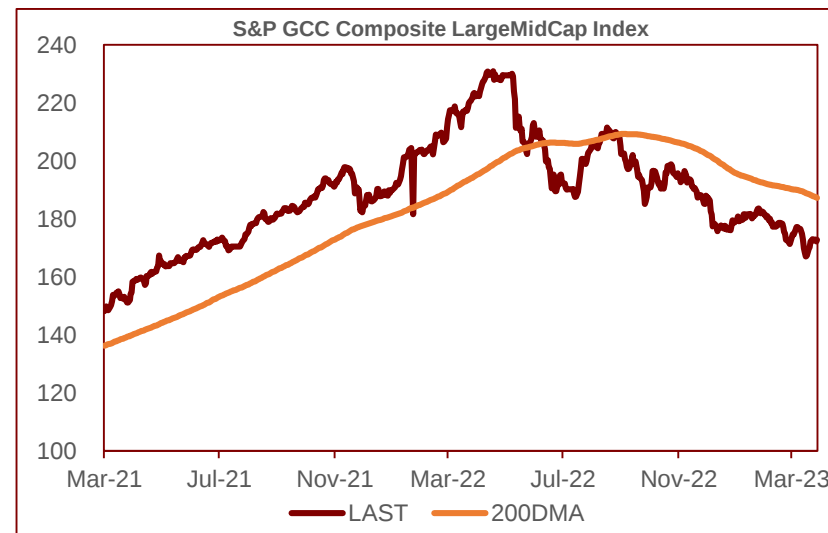




Market Watch

Tuesday, April 4th 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,948.60	1.31	3.39	3.39	3.39	4.49	10,199 SAR	1.78	17.14
Qatar (QE Index)	10,396.21	0.94	1.80	1.80	1.80	-2.67	536 QAR	1.28	11.48
Dubai (DFMGI)	3,454.60	0.52	0.85	1.41	1.41	3.55	501 AED	1.19	19.82
Abu Dhabi (ADI)	9,504.12	0.03	0.27	0.78	0.78	-6.92	1,435 AED	1.71	20.80
Bahrain (BAX)	1,888.98	-0.01	0.13	0.13	0.13	-0.33	19 BHD	1.72	18.00
MUSCAT SE INDEX	4,785.65	-0.13	-1.59	-1.59	-1.59	-1.48	5 OMR	1.01	13.25
SP GCC Comp LMC	178.40	0.95	2.50	2.73	2.73	-0.21			
SP UAE PRICE INDEX	130.52	0.21	0.83	1.99	1.99	-5.08			
Developed Markets									
MSCI World Index	2,796.78	-0.24	1.34	0.19	0.19	7.46			
U.S. (S&P 500)	4,100.60	-0.58	1.23	-0.21	-0.21	6.80			
U.K. (FTSE 100)	7,634.52	-0.50	0.18	0.04	0.04	2.45			
Japan (Topix)	2,022.76	0.25	1.99	0.96	0.96	6.93			
Emerging Markets									
MSCI EM Index	987.62	-0.16	0.19	-0.27	-0.27	3.27			
China (SSE Composite)	3,312.56	0.49	1.57	1.21	1.21	7.23			
India (Sensex)	59,106.44	0.00	1.98	0.19	0.19	-2.85			
Kuwait									
Kuwait All Share Index	6,987.47	-0.75	-0.90	-0.90	-0.90	-4.18	45.26 KWD	1.64	20.96
Kuwait Premier Index	7,745.76	-0.84	-0.97	-0.97	-0.97	-4.56	35.39 KWD	1.63	21.54
Kuwait Main Index	5,469.38	-0.35	-0.57	-0.57	-0.57	-2.28	9.86 KWD	1.65	18.89
NIC 50	8,752.28	-0.18	-0.98	-0.98	-0.98	-3.65	28.60 KWD	1.61	20.54
Kuwait Sector									
Banking	1,732.44	-1.19	-1.16	-1.16	-1.16	-3.43	29.17 KWD	1.28	22.54
Telecom	1,122.08	-0.59	-0.90	-0.90	-0.90	-5.03	3.44 KWD	1.91	11.97
Industrials	965.17	0.19	-2.21	-2.21	-2.21	-10.54	3.39 KWD	0.78	17.28
Financial services	1,204.51	0.56	0.71	0.71	0.71	-4.19	3.51 KWD	0.67	16.50
Real estate	1,090.02	0.35	0.91	0.91	0.91	-9.82	2.37 KWD	0.51	17.21
Basic materials	854.32	-0.89	-0.33	-0.33	-0.33	-1.25	0.76 KWD	1.33	7.92
Health care	462.45	0.00	1.53	1.53	1.53	0.13	0.23 KWD	2.48	10.54
Consumer services	452.50	-0.90	1.62	1.62	1.62	-5.72	0.72 KWD	0.83	12.52
Insurance	1,920.10	0.01	0.53	0.53	0.53	23.81	0.79 KWD	0.82	10.16
Consumer Disc	1,438.46	0.17	-1.61	-1.61	-1.61	-3.25	0.14 KWD	0.92	0.00
Energy	1,016.97	-0.29	1.91	1.91	1.91	-10.68	0.21 KWD	0.58	4.45
Technology	632.92	4.69	-0.46	-0.46	-0.46	-9.09	0.01 KWD	0.78	0.00
Utilities	460.53	0.58	-1.13	-1.13	-1.13	-6.91	0.19 KWD	1.65	13.31



What Move the GCC markets

Oil Prices

Oil prices rose on Tuesday after OPEC+ plans to cut more production jolted markets the previous day, with investors' attention shifting to demand trends and the impact of higher prices on the global economy. Brent crude futures were up 46 cents, or 0.5%, to \$85.39 a barrel.

Kuwait Market

The market closed down today by – 0.75% at 6,987.47 value traded 34.7 million KD, Premier market value traded reached 31.3 million KD down by – 0.84% at 7,745.76.

KSA Market

The market closed up today by + 1.31% at 10,948.60.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

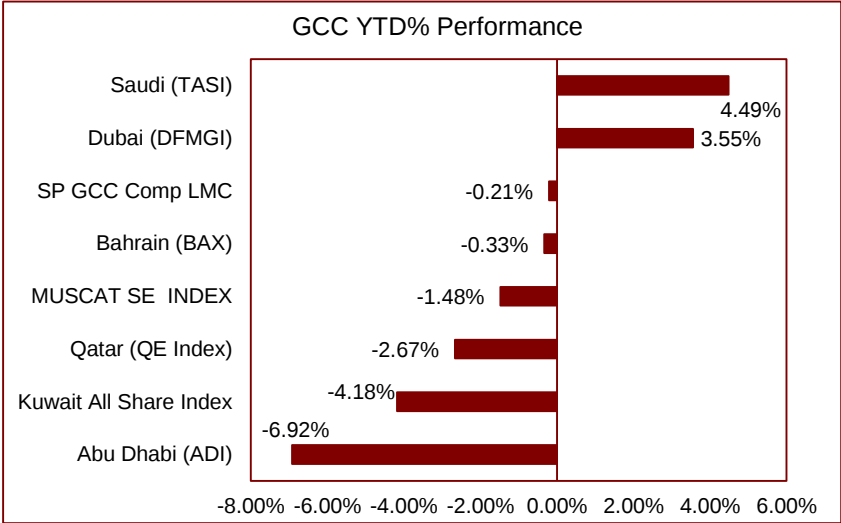


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.976	-1.21	-2.95	-2.95	-2.95	-4.94	7.74 KWD	1.91	27.00
KFH	0.745	-2.21	-0.79	-0.79	-0.79	-0.43	10.99 KWD	1.86	32.00
Zain	0.542	0.37	0.37	0.37	0.37	-3.73	2.34 KWD	1.91	11.97
BOUBYAN BANK	0.638	0.31	-0.78	-0.78	-0.78	-20.05	2.38 KWD	2.51	34.00
Agility	0.587	0.34	-5.48	-5.48	-5.48	-18.47	1.57 KWD	0.94	22.61
Saudi Arabia									
ARAMCO	32.80	0.77	1.55	1.55	1.55	2.18	7,216.00 SAR	4.98	12.25
SABIC	94.90	2.04	5.09	5.09	5.09	6.15	284.70 SAR	1.53	35.00
STC	41.20	1.10	2.87	2.87	2.87	12.57	206.00 SAR	2.79	16.71
AL-RAJHI BANK	75.70	2.02	2.99	2.99	2.99	0.66	302.80 SAR	3.02	19.02
NCB	49.30	2.71	7.52	7.52	7.52	-2.38	220.77 SAR	1.32	11.72
United Arab Emirates									
ETISALAT.AD	22.84	0.18	1.96	3.54	3.54	-0.09	206.60 AED	5.10	21.10
FAB.AD	13.12	0.00	0.00	1.86	1.86	-23.27	144.94 AED	1.26	11.11
EMIRATES NBD	13.40	0.37	1.52	1.90	1.90	3.08	84.64 AED	0.91	6.77
DB ISLAMIC BK	5.29	-0.19	-1.31	1.15	1.15	-7.19	38.30 AED	0.93	7.57
EMAAR PROPERT	5.75	-0.52	0.52	2.68	2.68	-1.88	50.82 AED	0.74	6.91
Qatar									
QNB	16.30	0.62	1.43	1.43	1.43	-9.44	150.55 QAR	1.43	11.34
INDUSTRIES QAT	13.23	0.53	1.77	1.77	1.77	3.28	80.04 QAR	1.91	9.08
QA ISLAMIC BK	18.75	2.07	5.46	5.46	5.46	1.02	44.30 QAR	1.63	11.61
MASRAF AL RAYA	2.82	0.11	-4.64	-4.64	-4.64	-11.13	26.21 QAR	1.09	17.88
MESAIEED PETRO	2.01	2.03	4.69	4.69	4.69	-5.50	25.25 QAR	1.45	14.29
OMAN									
BANK MUSCAT	0.275	0.36	0.00	0.00	0.00	0.00	2.06 OMR	0.92	8.33
OMANTEL	1.060	19.37	-3.64	-3.64	-3.64	15.22	0.80 OMR	1.25	7.69
BANK DHOFAR	0.155	-3.13	-3.13	-3.13	-3.13	-11.43	0.46 QAR	0.65	14.93
NAT BANK OF OMAN	0.268	0.00	0.00	0.00	0.00	-7.27	0.44 QAR	0.68	12.71
OMINVEST	0.438	2.82	-11.69	-11.69	-11.69	4.29	0.29 QAR	0.82	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, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is down today by -0.75 %The leading sector bottom performance indices today are Banking -1.19 % Consumer services -0.9 % Basic materials -0.89 % respectively

KSA
Saudi Armco has a positive performance today by + 0.77 %, SABIC has a positive performance today by + 2.04 %, STC has a positive performance today by + 1.1 %, Al Rajhi Bank has a positive performance today by + 2.02 %

U.A.E
ETISALAT .AD has a positive performance today by + 0.18 %, FAB.AD flat performance today



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