

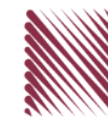


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, June 4th 2023





Market Watch

Sunday, June 4, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,221.96	1.88	0.33	1.89	5.97	7.10	10,803 SAR	2.01	17.64
Qatar (QE Index)	10,397.01	1.84	-0.56	2.39	1.81	-2.66	555 QAR	1.39	11.34
Dubai (DFMGI)	3,603.25	0.59	2.20	0.74	5.77	8.01	514 AED	1.35	17.13
Abu Dhabi (ADI)	9,406.08	0.42	0.06	-0.01	-0.26	-7.88	1,435 AED	1.77	20.65
Bahrain (BAX)	1,954.95	-0.15	-0.37	-0.44	3.62	3.15	20 BHD	1.64	17.62
MUSCAT SE INDEX	4,661.80	0.67	0.43	0.77	-4.14	-4.03	5 OMR	1.00	13.25
SP GCC Comp LMC	174.32	1.82	0.32	1.69	2.01	-0.90			
SP UAE PRICE INDEX	131.45	1.02	1.20	0.41	2.72	-4.40			

Developed Markets

MSCI World Index	2,873.37	1.47	2.74	2.60	2.94	10.40			
U.S. (S&P 500)	4,282.37	1.45	3.16	2.45	4.21	11.53			
U.K. (FTSE 100)	7,607.28	1.56	0.48	2.16	-0.32	2.09			
Japan (Topix)	2,182.70	1.55	1.70	2.44	8.94	15.38			

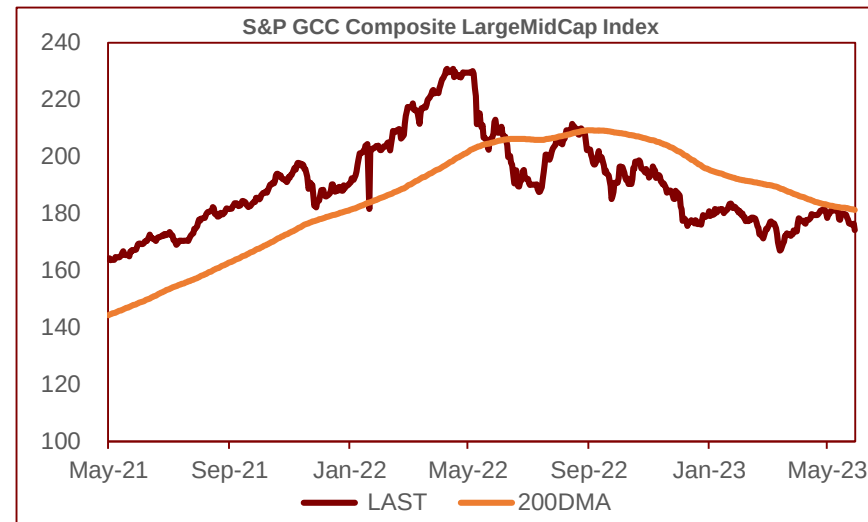
Emerging Markets

MSCI EM Index	984.36	2.35	2.11	2.69	-0.60	2.93			
China (SSE Composite)	3,230.07	0.79	0.90	0.80	-1.31	4.56			
India (Sensex)	62,547.11	0.19	1.09	-0.12	6.03	2.80			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,848.25	0.90	1.23	0.76	-2.87	-6.09	44.36 KWD	1.66	17.53
Kuwait Premier Index	7,571.81	1.22	1.45	1.03	-3.20	-6.70	34.55 KWD	1.61	17.28
Kuwait Main Index	5,424.09	-0.36	0.36	-0.31	-1.39	-3.09	9.81 KWD	1.84	18.45
NIC 50	8,649.35	0.98	1.44	1.02	-3.21	-4.78	28.60 KWD	1.59	16.28

Kuwait Sector

Banking	1,668.69	1.20	0.94	1.10	-4.80	-6.98	28.17 KWD	1.20	18.28
Telecom	1,095.88	-0.15	2.72	-0.05	-3.21	-7.24	3.36 KWD	1.33	8.63
Industrials	967.56	0.54	0.75	0.01	-1.96	-10.32	3.41 KWD	0.79	19.69
Financial services	1,192.50	0.81	1.82	0.70	-0.29	-5.15	3.43 KWD	0.69	19.36
Real estate	1,118.26	0.72	1.55	0.30	3.52	-7.48	2.42 KWD	0.54	20.87
Basic materials	939.27	1.39	4.33	2.24	9.58	8.57	0.81 KWD	1.54	6.86
Health care	449.74	-0.40	-1.98	-1.98	-1.26	-2.62	0.22 KWD	0.92	6.41
Consumer services	514.63	1.21	-0.95	2.29	15.57	7.23	0.76 KWD	0.86	14.37
Insurance	2,148.34	-0.11	0.21	0.57	12.48	38.53	0.88 KWD	0.77	8.71
Consumer Disc	1,528.85	0.68	2.79	-0.72	4.57	2.83	0.16 KWD	0.97	0.00
Energy	981.45	-2.03	-1.66	-0.86	-1.65	-13.80	0.21 KWD	0.72	4.24
Technology	685.30	1.40	17.90	-0.74	7.78	-1.57	0.01 KWD	0.85	0.00
Utilities	478.95	0.55	0.00	-1.09	2.83	-3.19	0.20 KWD	1.83	14.91



What Move the GCC markets

Oil Prices

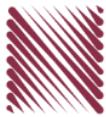
Oil prices rose following OPEC kingpin Saudi Arabia's decision to cut production by another million barrels per day. On Sunday, the Organization of the Petroleum Exporting Countries and its partners (known as OPEC+) made no changes to its planned oil production cuts for the rest of the year. However, the world's top oil exporter Saudi Arabia announced further voluntary output cuts which will be implemented from July. Global benchmark Brent futures were last trading up 1.43% at \$77.22 a barrel,

Kuwait Market

The market closed up today by + 0.90% at 6,848.25 value traded 52.9 million KD, Premier market value traded reached 47.3 million KD up by + 1.22% at 7,571.81.

KSA Market

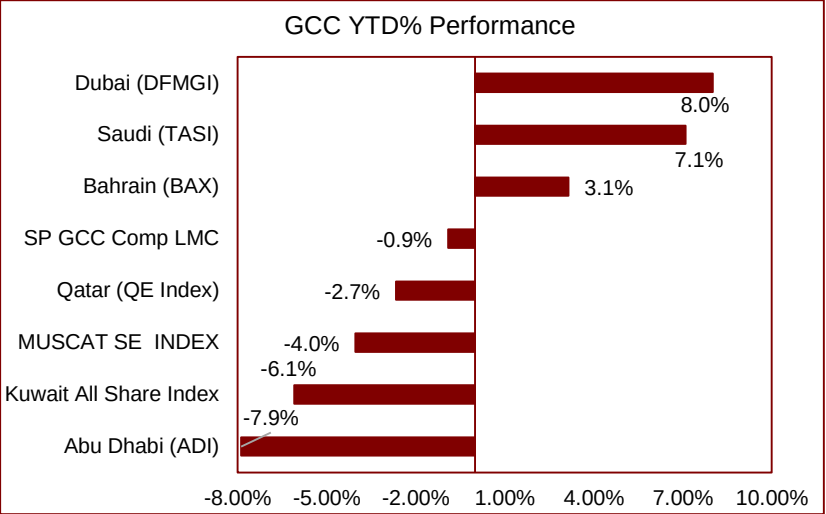
The market closed up today by + 1.88% at 11,221.96.



Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.934	1.85	1.19	1.52	-7.13	-9.03	7.41 KWD	1.88	27.00
KFH	0.719	1.27	1.41	1.70	-4.25	-3.90	10.62 KWD	1.83	32.00
Zain	0.515	0.00	1.78	-0.96	-4.63	-8.53	2.23 KWD	1.74	10.98
BOUBYAN BANK	0.604	0.67	1.34	0.67	-0.43	-19.77	2.39 KWD	2.70	34.00
Agility	0.612	0.82	1.16	0.16	-1.45	-15.00	1.64 KWD	0.86	22.06
Saudi Arabia									
ARAMCO	32.20	1.74	0.94	2.22	9.66	10.34	7,792.40 SAR	5.22	13.62
SABIC	90.10	2.04	0.00	2.15	-0.22	0.78	270.30 SAR	1.45	35.00
STC	42.70	1.07	0.12	-1.27	6.62	16.67	213.50 SAR	2.85	17.23
AL-RAJHI BANK	74.10	2.49	1.79	4.81	0.82	-1.46	296.40 SAR	2.99	16.85
NCB	37.30	1.77	-0.67	1.08	9.00	-1.03	223.80 SAR	1.30	11.83
United Arab Emirates									
ETISALAT.AD	22.94	1.96	0.88	-0.61	3.99	0.35	206.60 AED	5.10	21.10
FAB.AD	12.90	1.57	0.00	1.57	0.16	-24.56	142.51 AED	1.27	12.15
EMIRATES NBD	13.80	1.10	1.47	1.10	4.94	6.15	87.17 AED	0.91	5.21
DB ISLAMIC BK	5.30	0.57	2.51	0.76	1.34	-7.02	38.38 AED	0.95	7.37
EMAAR PROPERT	6.10	0.66	4.27	-0.81	8.93	4.10	53.92 AED	0.76	6.43
Qatar									
QNB	16.31	1.56	-1.15	1.87	1.49	-9.39	150.85 QAR	1.48	10.77
INDUSTRIES QAT	12.25	2.08	-4.07	2.25	-5.77	-4.37	74.21 QAR	2.03	10.18
QA ISLAMIC BK	18.08	2.09	1.52	3.20	1.69	-2.59	42.78 QAR	1.60	11.05
MASRAF AL RAYA	2.67	2.54	0.00	4.55	-9.78	-15.93	24.83 QAR	1.05	20.27
MESAIEED PETRO	2.03	3.84	1.10	2.89	5.52	-4.75	25.49 QAR	1.56	15.98
OMAN									
BANK MUSCAT	0.266	0.76	2.70	1.53	-3.27	-3.27	1.99 OMR	0.92	8.33
OMANTEL	0.972	9.46	1.25	0.83	-11.64	5.65	0.73 OMR	1.20	7.69
BANK DHOFAR	0.175	0.00	-0.57	0.00	9.38	0.00	0.52 QAR	0.74	14.93
NAT BANK OF OMAN	0.272	-0.37	0.74	-0.37	1.49	-5.88	0.44 QAR	0.69	12.71
OMINVEST	0.370	0.00	-2.63	0.00	-25.40	-11.90	0.25 QAR	0.69	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
24-May 23	24.55%	15.75%	0.06%	1.35%	0.23%	4.61%	17.69%	14.02%	6.09%	4.96%
31-May 23	24.51%	15.66%	0.06%	1.36%	0.23%	4.59%	17.67%	13.99%	6.11%	4.76%

End of Report
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Leading Sector, Security Performance

Kuwait
The market is up today by + 0.9 %The leading sector best performance indices today are Technology 1.4 % Basic materials 1.39 % Consumer services 1.21 % respectively

KSA
Saudi Armco has a positive performance today by + 1.74 %, SABIC have positive performance today by + 2.0 %. STC has a positive performance today by + 1.07 %, Al Rajhi Bank has a positive performance today by + 2.49 %

U.A.E
ETISALAT .AD has a positive performance today by + 1.96 %, FAB.AD has a positive performance today by + 1.57 %



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw