



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, May 4th 2023



DAILY MARKETS WRAP,

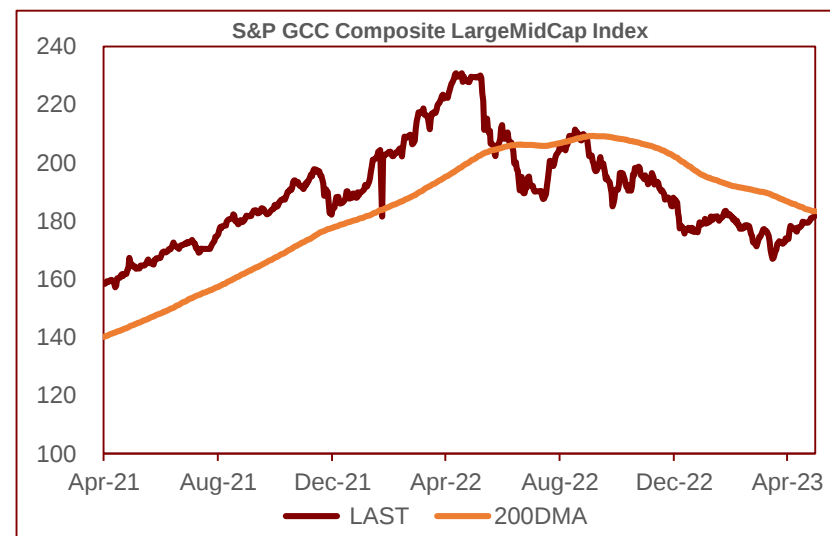
NIC RESEARCH AND STUDIES DEP



Market Watch

Thursday, May 4, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,118.77	0.41	1.41	-1.67	4.99	6.11	10,725 SAR	1.84	17.72
Qatar (QE Index)	10,639.90	1.48	5.45	4.51	4.18	-0.39	567 QAR	1.40	11.15
Dubai (DFMGI)	3,583.09	0.36	2.96	1.29	5.40	7.63	513 AED	1.25	23.58
Abu Dhabi (ADI)	9,705.95	0.30	1.21	-1.18	2.58	-5.26	1,435 AED	1.74	20.94
Bahrain (BAX)	1,906.49	0.22	1.33	0.11	1.05	0.59	20 BHD	1.63	18.00
MUSCAT SE INDEX	4,724.25	-0.09	-1.81	0.13	-2.85	-2.74	5 OMR	1.02	13.25
SP GCC Comp LMC	179.85	0.65	1.12	-1.07	3.47	0.51			
SP UAE PRICE INDEX	135.75	0.34	2.21	-1.56	5.75	-1.57			
Developed Markets									
MSCI World Index	2,821.99	-0.61	-1.77	-2.00	-0.44	6.78			
U.S. (S&P 500)	4,136.25	-0.72	-2.05	-2.60	-1.17	5.77			
U.K. (FTSE 100)	7,778.38	-1.10	-1.79	-2.13	0.93	3.37			
Japan (Topix)	2,075.53	0.00	3.37	0.88	3.60	9.72			
Emerging Markets									
MSCI EM Index	981.66	0.70	-2.07	-0.07	-1.41	2.09			
China (SSE Composite)	3,334.50	0.82	0.97	0.82	2.37	8.46			
India (Sensex)	61,054.29	0.91	2.18	1.04	4.67	1.49			
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,033.53	0.55	0.62	-1.52	-0.24	-3.55	45.56 KWD	1.69	20.49
Kuwait Premier Index	7,779.25	0.73	0.27	-1.68	-0.54	-4.15	35.57 KWD	1.69	20.39
Kuwait Main Index	5,560.32	-0.24	2.21	-0.82	1.08	-0.65	9.98 KWD	1.70	20.89
NIC 50	8,859.03	0.61	0.26	-1.69	-0.55	-2.47	28.60 KWD	1.67	19.39
Kuwait Sector									
Banking	1,732.82	0.83	0.44	-1.33	-1.14	-3.41	29.20 KWD	1.28	21.39
Telecom	1,168.32	0.68	2.85	-0.54	3.18	-1.11	3.59 KWD	1.47	9.48
Industrials	979.26	0.35	0.17	-2.61	-0.78	-9.23	3.45 KWD	0.79	18.27
Financial services	1,211.41	-0.07	0.00	-1.55	1.29	-3.65	3.52 KWD	0.71	20.30
Real estate	1,093.29	-0.65	-2.20	-4.46	1.21	-9.55	2.37 KWD	0.52	13.88
Basic materials	854.90	-1.54	2.12	-4.16	-0.26	-1.18	0.76 KWD	1.53	7.88
Health care	457.01	0.00	-1.18	0.00	0.33	-1.05	0.23 KWD	1.03	10.16
Consumer services	451.45	0.05	0.61	-1.20	1.39	-5.94	0.72 KWD	0.85	13.76
Insurance	2,110.93	0.11	11.31	-0.13	10.52	36.12	0.87 KWD	0.76	10.00
Consumer Disc	1,441.77	-0.58	0.91	-1.06	-1.38	-3.03	0.14 KWD	0.91	0.00
Energy	979.24	-0.59	-1.90	0.04	-1.87	-13.99	0.20 KWD	0.64	4.49
Technology	610.37	3.20	-2.10	4.87	-4.00	-12.33	0.01 KWD	0.75	0.00
Utilities	468.42	0.00	1.14	1.71	0.56	-5.32	0.20 KWD	1.67	13.54



What Move the GCC markets

Oil Prices

Oil prices rose on Thursday but were unable to claw back much of this week's more than 8% decline as demand concerns in major consuming countries continued to weigh. Brent futures were up 73 cents, or 1.01%, to \$73.06 a barrel.

Kuwait Market

The market closed up today by + 0.55% at 7,033.53 value traded 34.5 million KD, Premier market value traded reached 30.8 million KD up by + 0.73% at 7,779.25.

KSA Market

The market closed up today by + 0.41 % at 11,118.77

DAILY MARKETS WRAP,

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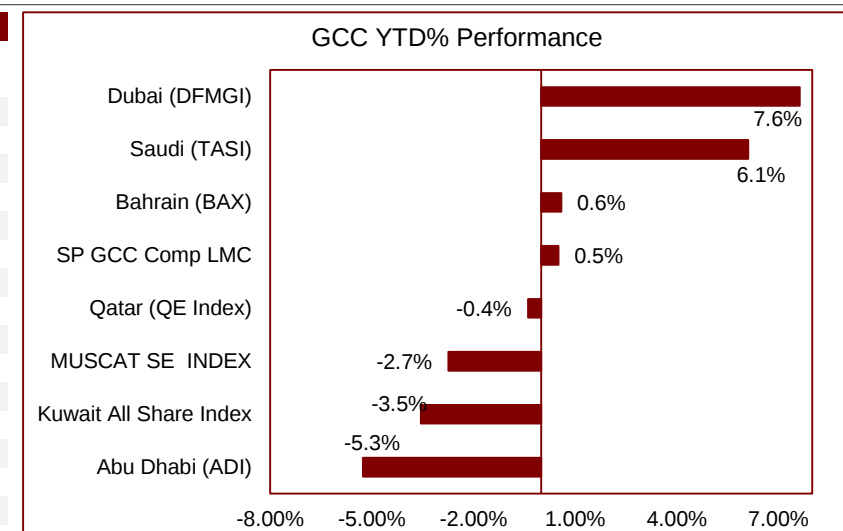
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	0.980	1.34	1.77	-2.39	-2.56	-4.55	7.78 KWD	1.97	27.00
KFH	0.738	1.10	-0.27	-0.40	-1.72	-1.36	10.90 KWD	1.88	32.00
Zain	0.561	0.90	2.00	-0.36	3.89	-0.36	2.43 KWD	1.97	12.39
BOUBYAN BANK	0.640	1.27	1.59	-3.18	5.51	-14.99	2.54 KWD	2.86	34.00
Agility	0.605	0.67	1.17	-1.79	-2.58	-15.97	1.62 KWD	0.96	23.31
Saudi Arabia									
ARAMCO	35.05	-0.14	6.70	-3.44	8.51	9.19	7,716.56 SAR	5.32	13.21
SABIC	89.00	-1.00	-2.41	-4.20	-1.44	-0.45	267.19 SAR	1.44	35.00
STC	43.35	1.88	2.00	-2.36	8.24	18.44	216.91 SAR	2.94	17.45
AL-RAJHI BANK	74.40	0.40	-1.59	-3.25	1.22	-1.06	297.81 SAR	2.97	17.27
NCB	49.20	-1.01	-1.11	-0.40	7.31	-2.57	220.48 SAR	1.32	11.94
United Arab Emirates									
ETISALAT.AD	23.48	1.12	0.17	-2.17	6.44	2.71	206.60 AED	5.10	21.10
FAB.AD	13.96	1.01	6.08	-1.55	8.39	-18.36	155.77 AED	1.39	13.15
EMIRATES NBD	14.05	0.36	8.08	-0.35	6.84	8.08	88.75 AED	0.93	5.31
DB ISLAMIC BK	5.51	-0.72	3.77	-0.90	5.35	-3.33	40.48 AED	1.00	7.66
EMAAR PROPERT	5.91	-0.51	-1.01	-0.34	5.54	0.85	53.03 AED	0.77	7.10
Qatar									
QNB	16.96	4.31	9.42	10.85	5.54	-5.78	156.65 QAR	1.54	11.20
INDUSTRIES QAT	13.23	-0.90	1.46	2.16	1.77	3.28	80.04 QAR	1.91	9.08
QA ISLAMIC BK	18.17	1.79	2.25	1.57	2.19	-2.10	42.93 QAR	1.61	11.10
MASRAF AL RAYA	2.69	0.04	-0.33	2.60	-9.14	-15.33	24.97 QAR	1.06	20.42
MESAIEED PETRO	2.07	0.78	5.03	5.09	7.60	-2.87	25.96 QAR	1.49	14.68
OMAN									
BANK MUSCAT	0.270	-0.37	-1.82	-1.10	-1.82	-1.82	2.03 OMR	0.93	8.33
OMANTEL	1.000	12.61	-1.48	0.00	-9.09	8.70	0.75 OMR	1.18	7.69
BANK DHOFAR	0.160	1.27	0.00	3.23	0.00	-8.57	0.47 QAR	0.66	14.93
NAT BANK OF OMAN	0.288	0.35	1.41	4.73	7.46	-0.35	0.47 QAR	0.73	12.71
OMINVEST	0.400	-0.50	-3.85	-1.48	-19.35	-4.76	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 up today by + 0.55 %The leading sector best performance indices today are Technology 3.2 % Banking 0.83 % Telecom 0.68 % respectively

KSA

Saudi Armco has a negative performance today by -0.14 %, SABIC has a negative performance today by -1.0 %, STC has a positive performance today by + 1.88 %, Al Rajhi Bank has a positive performance today by + 0.4 %

U.A.E

ETISALAT .AD has a positive performance today by + 1.12 %, FAB.AD has a positive performance today by + 1.01 %



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