



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, April 5th 2023



DAILY MARKETS WRAP,

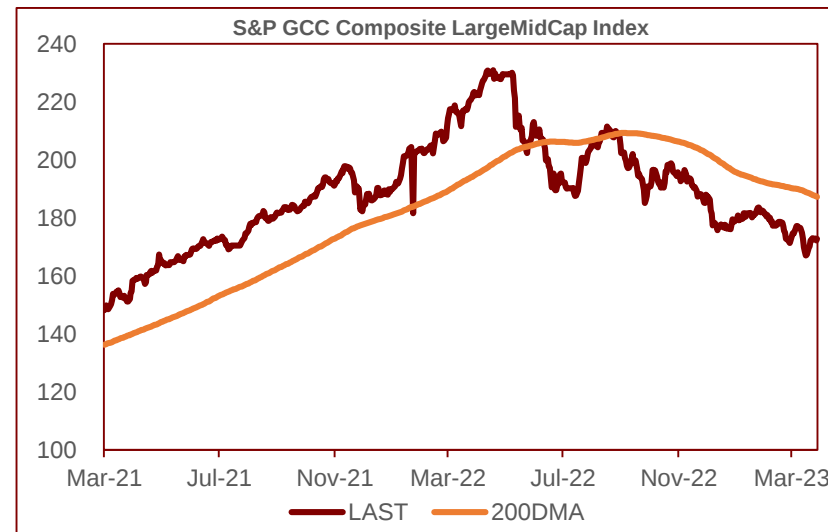
NIC RESEARCH AND STUDIES DEP



Market Watch

Wednesday, April 5th 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,920.63	-0.26	3.12	3.12	3.12	4.22	10,122 SAR	1.80	17.50
Qatar (QE Index)	10,359.22	-0.36	1.44	1.44	1.44	-3.01	535 QAR	1.27	11.49
Dubai (DFMGI)	3,429.63	-0.72	0.12	0.67	0.67	2.80	498 AED	1.18	20.18
Abu Dhabi (ADI)	9,494.98	-0.10	0.17	0.69	0.69	-7.01	1,435 AED	1.71	20.87
Bahrain (BAX)	1,887.16	-0.10	0.03	0.03	0.03	-0.43	19 BHD	1.72	18.00
MUSCAT SE INDEX	4,801.44	0.33	-1.27	-1.27	-1.27	-1.15	5 OMR	1.02	13.25
SP GCC Comp LMC	178.10	-0.17	2.32	2.55	2.55	-0.38			
SP UAE PRICE INDEX	130.30	-0.17	0.66	1.82	1.82	-5.23			
Developed Markets									
MSCI World Index	2,784.05	-0.46	0.88	-0.26	-0.26	6.97			
U.S. (S&P 500)	4,090.38	-0.25	0.98	-0.46	-0.46	6.53			
U.K. (FTSE 100)	7,662.94	0.37	0.56	0.41	0.41	2.83			
Japan (Topix)	1,983.84	-1.92	0.03	-0.98	-0.98	4.87			
Emerging Markets									
MSCI EM Index	987.85	0.02	0.21	-0.25	-0.25	3.29			
China (SSE Composite)	3,312.56	0.00	1.57	1.21	1.21	7.23			
India (Sensex)	59,689.31	0.99	2.98	1.18	1.18	-1.89			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,992.83	0.08	-0.82	-0.82	-0.82	-4.10	45.35 KWD	1.64	20.99
Kuwait Permier Index	7,756.65	0.14	-0.83	-0.83	-0.83	-4.42	35.50 KWD	1.64	21.63
Kuwait Main Index	5,458.14	-0.21	-0.78	-0.78	-0.78	-2.48	9.85 KWD	1.65	18.71
NIC 50	8,761.65	0.11	-0.84	-0.84	-0.84	-3.55	28.60 KWD	1.62	20.63
Kuwait Sector									
Banking	1,736.68	0.24	-0.92	-0.92	-0.92	-3.19	29.28 KWD	1.27	22.63
Telecom	1,121.92	-0.01	-0.91	-0.91	-0.91	-5.04	3.44 KWD	1.91	11.97
Industrials	964.83	-0.04	-2.24	-2.24	-2.24	-10.57	3.40 KWD	0.77	17.28
Financial services	1,202.54	-0.16	0.55	0.55	0.55	-4.35	3.50 KWD	0.67	16.44
Real estate	1,084.34	-0.52	0.38	0.38	0.38	-10.29	2.36 KWD	0.50	14.56
Basic materials	845.80	-1.00	-1.33	-1.33	-1.33	-2.23	0.76 KWD	1.33	7.83
Health care	462.45	0.00	1.53	1.53	1.53	0.13	0.23 KWD	2.48	10.54
Consumer services	451.47	-0.23	1.39	1.39	1.39	-5.93	0.72 KWD	0.83	12.47
Insurance	1,918.17	-0.10	0.43	0.43	0.43	23.69	0.79 KWD	0.82	10.16
Consumer Disc	1,427.88	-0.74	-2.33	-2.33	-2.33	-3.96	0.14 KWD	0.91	0.00
Energy	996.48	-2.01	-0.14	-0.14	-0.14	-12.48	0.21 KWD	0.57	4.45
Technology	632.92	0.00	-0.46	-0.46	-0.46	-9.09	0.01 KWD	0.78	0.00
Utilities	460.53	0.00	-1.13	-1.13	-1.13	-6.91	0.19 KWD	1.65	13.31



What Move the GCC markets

Oil Prices

Oil fell on Wednesday as weak U.S. economic data raised concerns over a potential global recession and demand reduction, but benchmark prices were headed for a weekly advance after OPEC+ announced further output cuts and U.S. oil stocks dropped. Brent crude futures fell to \$84.99 a barrel.

Kuwait Market

The market closed up today by + 0.08% at 6,992.83 value traded 26.6 million KD, Premier market value traded reached 22.9 million KD up by + 0.14% at 7,756.65.

KSA Market

The market closed down today by - 0.26% at 10,920.63.



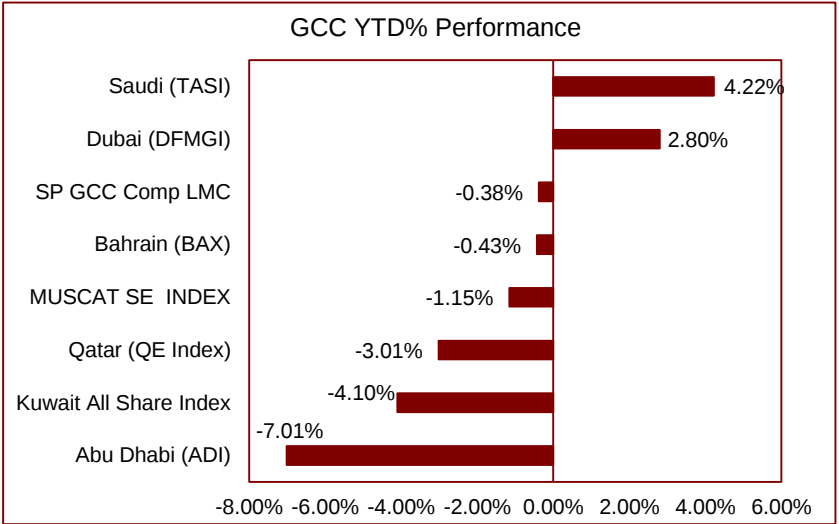
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	0.983	0.72	-2.26	-2.26	-2.26	-4.25	7.80 KWD	1.92	27.00
KFH	0.744	-0.13	-0.92	-0.92	-0.92	-0.56	10.98 KWD	1.86	32.00
Zain	0.542	0.00	0.37	0.37	0.37	-3.73	2.35 KWD	1.91	11.97
BOUBYAN BANK	0.650	1.88	1.09	1.09	1.09	-18.55	2.43 KWD	2.56	34.00
Agility	0.585	-0.34	-5.80	-5.80	-5.80	-18.75	1.57 KWD	0.93	22.54
Saudi Arabia									
ARAMCO	32.50	-0.91	0.62	0.62	0.62	1.25	7,151.53 SAR	4.93	12.34
SABIC	93.70	-1.26	3.77	3.77	3.77	4.81	281.16 SAR	1.51	35.00
STC	41.00	-0.49	2.37	2.37	2.37	12.02	205.04 SAR	2.78	16.90
AL-RAJHI BANK	75.80	0.13	3.13	3.13	3.13	0.80	303.26 SAR	3.03	19.41
NCB	49.90	1.22	8.83	8.83	8.83	-1.19	223.50 SAR	1.33	12.03
United Arab Emirates									
ETISALAT.AD	22.84	0.00	1.96	3.54	3.54	-0.09	206.60 AED	5.10	21.10
FAB.AD	13.10	-0.15	-0.15	1.71	1.71	-23.39	144.72 AED	1.26	11.10
EMIRATES NBD	13.35	-0.37	1.14	1.52	1.52	2.69	84.32 AED	0.90	6.74
DB ISLAMIC BK	5.28	-0.19	-1.49	0.96	0.96	-7.37	38.23 AED	0.92	7.56
EMAAR PROPERT	5.73	-0.35	0.17	2.32	2.32	-2.22	50.64 AED	0.73	6.88
Qatar									
QNB	16.29	-0.06	1.37	1.37	1.37	-9.50	150.46 QAR	1.43	11.34
INDUSTRIES QAT	13.19	-0.30	1.46	1.46	1.46	2.97	79.80 QAR	1.90	9.05
QA ISLAMIC BK	18.80	0.27	5.74	5.74	5.74	1.29	44.42 QAR	1.63	11.64
MASRAF AL RAYA	2.80	-0.82	-5.41	-5.41	-5.41	-11.86	25.99 QAR	1.08	17.73
MESAIEED PETRO	1.98	-1.74	2.86	2.86	2.86	-7.15	24.81 QAR	1.43	14.04
OMAN									
BANK MUSCAT	0.274	-0.36	-0.36	-0.36	-0.36	-0.36	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	0.00	-3.12	-3.12	-3.12	-11.43	0.47 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	0.00	-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, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.08 %The leading sector best performance indices today are Banking 0.24 % Utilities 0 % Technology 0 % respectively

KSA

Saudi Armco have negative performance today by -0.91 %, SABIC have negative performance today by -1.26 %, STC has a negative performance today by -0.49 %, Al Rajhi Bank has a positive performance today by + 0.13 %

U.A.E

ETISALAT .AD has a flat performance today, FAB.AD has a negative performance today by -0.15 %



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