



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, February 5th 2023





Market Watch

Sunday, February 5, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,558.58	-1.34	-2.43	-2.17	0.76	0.76	9,905 SAR	1.72	15.32
Qatar (QE Index)	10,654.55	-0.41	-4.10	-2.54	-0.25	-0.25	548 QAR	1.36	12.32
Dubai (DFMGI)	3,382.90	0.76	0.76	2.41	1.40	1.40	487 AED	1.21	12.85
Abu Dhabi (ADI)	9,931.09	-0.69	-0.69	1.22	-2.74	-2.74	1,435 AED	1.97	20.51
Bahrain (BAX)	1,935.93	0.77	0.43	0.40	2.15	2.15	20 BHD	1.66	15.27
MUSCAT SE INDEX	4,740.97	0.45	-0.22	0.80	-2.40	-2.40	5 OMR	0.96	13.25
SP GCC Comp LMC	179.46	-0.80	-1.93	-1.08	0.38	0.38			
SP UAE PRICE INDEX	137.24	0.18	0.18	2.50	-0.18	-0.18			

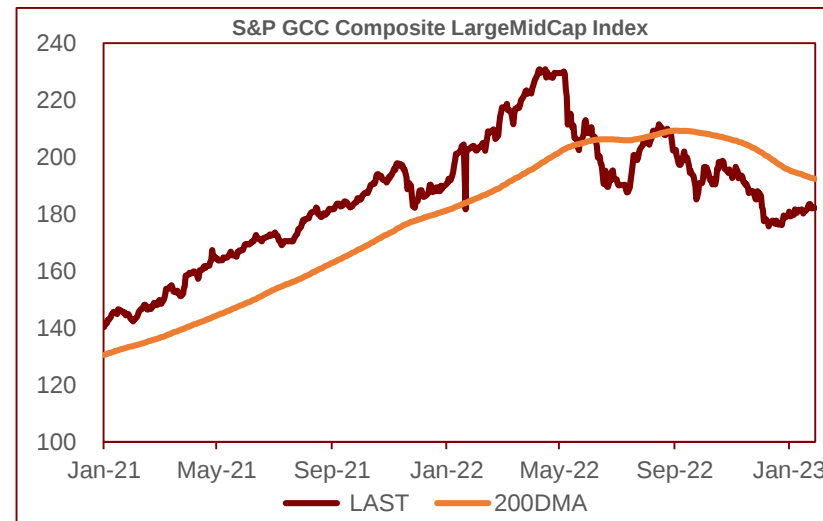
Developed Markets

MSCI World Index	2,820.73	1.55	1.55	1.28	8.38	8.38			
U.S. (S&P 500)	4,136.48	1.87	1.87	1.47	7.73	7.73			
U.K. (FTSE 100)	7,901.80	1.81	1.81	1.67	6.04	6.04			
Japan (Topix)	1,970.26	-0.41	-0.41	-0.25	4.15	4.15			

Emerging Markets

MSCI EM Index	1,038.72	-1.31	-1.31	0.70	8.61	8.61			
China (SSE Composite)	3,263.41	-0.04	-0.04	0.24	5.64	5.64			
India (Sensex)	60,841.88	1.06	1.06	2.17	0.00	0.00			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,336.66	0.09	0.35	0.82	0.61	0.61	47.43 KWD	2.12	29.11
Kuwait Premier Index	8,160.30	0.00	0.58	0.93	0.55	0.55	37.33 KWD	2.25	24.56
Kuwait Main Index	5,644.56	0.42	-0.59	0.38	0.85	0.85	10.09 KWD	1.64	46.06
NIC 50	9,143.83	0.46	0.57	0.92	0.54	7.29	28.60 KWD	2.23	23.56
Kuwait Sector									
Banking	1,828.75	0.14	0.58	0.85	1.94	1.94	30.78 KWD	1.37	25.56
Telecom	1,213.32	0.10	-0.57	1.31	2.70	2.70	3.72 KWD	2.03	12.05
Industrials	990.91	0.02	0.70	1.13	-8.15	-8.15	3.48 KWD	0.80	18.38
Financial services	1,264.43	0.06	-0.18	0.85	0.57	0.57	3.60 KWD	0.73	16.45
Real estate	1,194.39	0.08	0.85	0.47	-1.18	-1.18	2.60 KWD	0.59	23.84
Basic materials	864.06	-0.28	0.39	0.11	-0.12	-0.12	0.77 KWD	1.28	8.37
Health care	429.17	0.85	-3.27	-3.27	-7.08	-7.08	0.21 KWD	2.35	11.92
Consumer services	474.79	-0.14	-4.08	-1.00	-1.08	-1.08	0.70 KWD	0.92	11.34
Insurance	1,562.66	-0.20	-0.09	0.58	0.76	0.76	0.64 KWD	0.82	9.50
Consumer Disc	1,395.13	-1.25	-1.12	-0.61	-6.17	-6.17	0.14 KWD	0.95	0.00
Energy	1,099.88	-0.11	-4.29	0.13	-3.39	-3.39	0.23 KWD	0.63	5.06
Technology	734.05	2.96	6.21	5.54	5.43	5.43	0.01 KWD	0.90	0.00
Utilities	481.58	1.67	0.55	0.55	-2.66	-2.66	0.20 KWD	1.69	15.05



What Move the GCC markets

Oil Prices

Oil prices fell on Friday in a volatile session, after strong U.S. jobs data raised concerns about higher interest rates and as investors sought more clarity on the imminent EU embargo on Russian refined products. Brent crude futures fell \$2.43, or 3%, to \$79.74 a barrel

Kuwait Market

The market closed up today by + 0.09% at 7,336.66 value traded 27.6 million KD, Premier market value traded reached 20.6 million KD flat at 8,160.30.

KSA Market

The market closed down today by – 1.34% at 10,558.58.



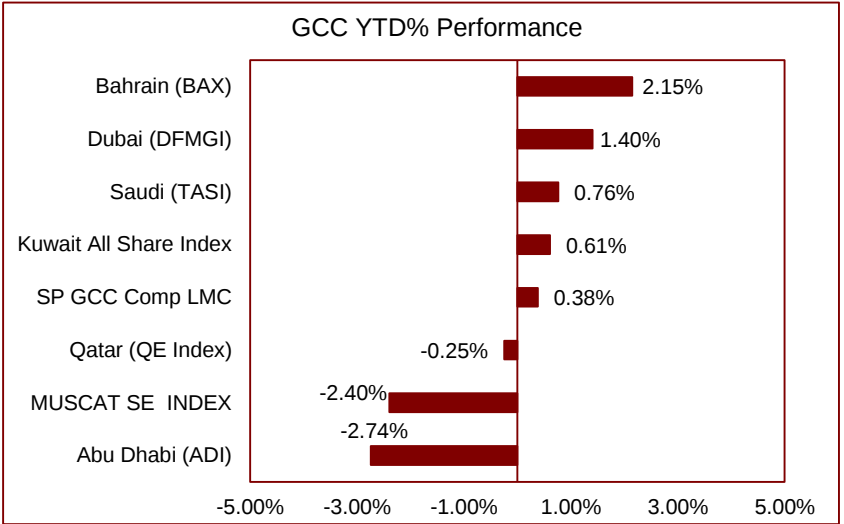
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.120	0.09	1.73	2.10	3.90	3.90	8.46 KWD	2.08	27.00
KFH	0.837	0.00	0.48	0.12	1.70	1.70	11.23 KWD	3.45	32.00
Zain	0.563	-0.18	0.36	1.62	0.00	0.00	2.44 KWD	2.03	12.05
BOUBYAN BANK	0.789	-0.38	-1.62	0.64	-1.13	-1.13	2.95 KWD	3.11	34.00
Agility	0.601	-0.17	1.18	1.69	-16.53	-16.53	1.61 KWD	1.11	39.28
Saudi Arabia									
ARAMCO	32.10	-1.53	-2.43	-2.58	0.00	0.00	7,061.81 SAR	5.08	12.46
SABIC	90.30	-1.20	-5.35	-2.59	1.01	1.01	270.89 SAR	1.48	35.00
STC	36.35	-2.02	-2.94	-1.49	-0.68	-0.68	181.75 SAR	2.47	15.40
AL-RAJHI BANK	79.00	-1.86	-2.35	-3.66	5.05	5.05	315.99 SAR	3.67	20.75
NCB	49.35	1.13	2.28	4.33	-2.28	-2.28	220.98 SAR	1.35	11.92
United Arab Emirates									
ETISALAT.AD	26.68	4.38	4.38	3.81	16.71	16.71	206.60 AED	5.10	21.10
FAB.AD	14.10	-1.26	-1.26	3.68	-17.54	-17.54	155.78 AED	1.35	11.94
EMIRATES NBD	13.50	3.85	3.85	4.25	3.85	3.85	85.28 AED	0.91	6.82
DB ISLAMIC BK	5.58	-1.24	-1.24	0.54	-2.11	-2.11	40.40 AED	0.98	7.99
EMAAR PROPERT	5.53	-4.82	-4.82	-0.54	-5.63	-5.63	48.88 AED	0.69	6.37
Qatar									
QNB	17.92	3.46	-3.08	-0.44	-0.44	-0.44	166.05 QAR	1.58	12.47
INDUSTRIES QAT	13.50	-2.17	-2.39	-3.91	5.39	5.39	81.94 QAR	2.02	8.60
QA ISLAMIC BK	19.10	-0.52	-3.78	-2.90	2.91	2.91	45.28 QAR	1.66	11.82
MASRAF AL RAYA	2.64	-0.79	-14.02	-3.37	-16.81	-16.81	24.61 QAR	1.02	16.74
MESAIEED PETRO	2.13	-2.25	-4.54	-1.16	-0.09	-0.09	26.78 QAR	1.56	14.09
OMAN									
BANK MUSCAT	0.285	1.79	3.64	3.26	3.64	3.64	2.14 OMR	0.98	8.33
OMANTEL	0.976	9.91	2.95	2.95	6.09	6.09	0.73 OMR	1.24	7.69
BANK DHOFAR	0.145	-3.33	-9.38	-3.33	-17.14	-17.14	0.43 QAR	0.61	14.93
NAT BANK OF OMAN	0.280	1.82	-3.45	2.19	-3.11	-3.11	0.45 QAR	0.78	12.71
OMINVEST	0.418	0.00	0.00	0.00	-0.48	-0.48	0.28 QAR	0.83	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
25-Jan 23	24.69%	16.88%	0.06%	1.34%	0.37%	4.74%	17.67%	15.21%	5.86%	5.17%
1-Feb 23	24.69%	16.82%	0.06%	1.35%	0.38%	4.47%	17.66%	15.20%	5.86%	5.19%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.09 %The leading sector best performance indices today are Technology 2.96 % Utilities 1.67 % Health care 0.85 % respectively

KSA

Saudi Armco have negative performance today by -1.53 %, SABIC have negative performance today by -1.20 %, STC have negative performance today by -2.02 %, Al Rajhi Bank have negative performance today by -1.86 %

U.A.E

ETISALAT .AD has a positive performance today by + 4.38 %, FAB.AD has a negative performance today by -1.26 %



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