

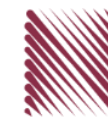


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, June 5th 2023



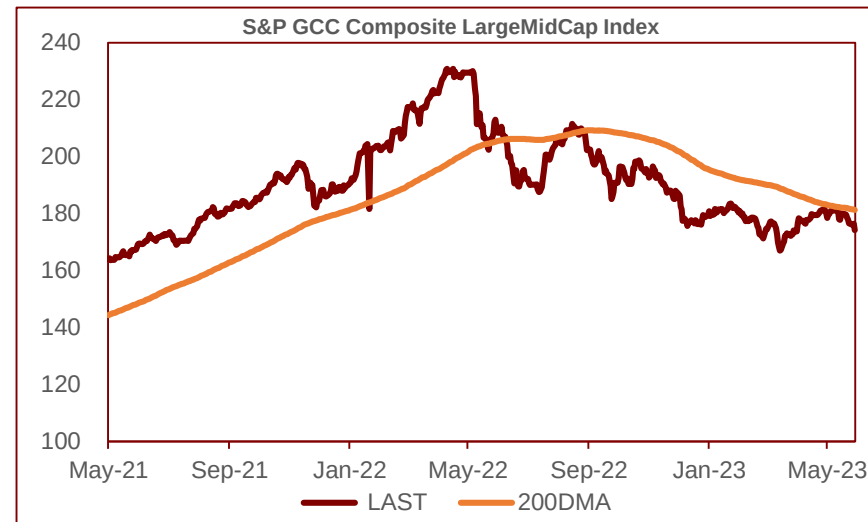


Market Watch

Monday, June 5, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,316.87	0.64	2.53	2.54	6.64	7.78	10,919 SAR	2.03	18.10
Qatar (QE Index)	10,255.19	0.36	2.21	2.76	2.18	-2.31	545 QAR	1.36	11.25
Dubai (DFMGI)	3,677.98	1.37	1.97	2.13	7.22	9.49	526 AED	1.37	17.73
Abu Dhabi (ADI)	9,356.98	-0.32	0.10	-0.33	-0.58	-8.18	1,435 AED	1.76	20.69
Bahrain (BAX)	1,951.94	0.01	-0.14	-0.42	3.64	3.16	20 BHD	1.64	17.64
MUSCAT SE INDEX	4,654.95	-0.15	0.52	0.61	-4.28	-4.17	5 OMR	1.00	13.25
SP GCC Comp LMC	177.49	0.38	2.21	2.07	2.40	-0.53			
SP UAE PRICE INDEX	131.07	0.00	0.98	0.37	2.68	-4.43			
Developed Markets									
MSCI World Index	2,877.97	-0.11	1.36	2.49	2.82	10.28			
U.S. (S&P 500)	4,283.85	-0.20	1.25	2.25	4.00	11.31			
U.K. (FTSE 100)	7,628.10	-0.10	1.46	2.07	-0.42	1.99			
Japan (Topix)	2,236.28	1.70	3.28	4.18	10.80	17.34			
Emerging Markets									
MSCI EM Index	988.49	0.24	2.59	2.94	-0.36	3.17			
China (SSE Composite)	3,195.34	0.07	0.87	0.87	-1.23	4.63			
India (Sensex)	62,792.88	0.38	0.57	0.26	6.43	3.20			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,905.87	0.84	1.75	1.60	-2.05	-5.30	44.71 KWD	1.68	17.71
Kuwait Premier Index	7,648.62	1.01	2.25	2.05	-2.21	-5.76	34.87 KWD	1.63	17.52
Kuwait Main Index	5,432.61	0.16	-0.21	-0.15	-1.24	-2.93	9.83 KWD	1.85	18.40
NIC 50	8,719.34	0.81	2.24	2.04	-2.22	-4.01	28.60 KWD	1.61	16.52
Kuwait Sector									
Banking	1,684.03	0.92	2.13	2.03	-3.93	-6.13	28.40 KWD	1.21	18.52
Telecom	1,112.08	1.48	1.33	1.43	-1.78	-5.87	3.41 KWD	1.36	8.80
Industrials	974.72	0.74	1.28	0.75	-1.24	-9.65	3.44 KWD	0.79	19.77
Financial services	1,193.29	0.07	0.87	0.77	-0.22	-5.09	3.44 KWD	0.69	19.36
Real estate	1,125.44	0.64	1.36	0.94	4.19	-6.89	2.44 KWD	0.54	20.83
Basic materials	944.45	0.55	1.95	2.81	10.18	9.17	0.81 KWD	1.55	7.07
Health care	458.52	1.95	1.54	-0.07	0.67	-0.72	0.23 KWD	0.97	6.82
Consumer services	522.84	1.60	2.82	3.92	17.42	8.94	0.77 KWD	0.87	14.34
Insurance	2,140.12	-0.38	-0.50	0.18	12.05	38.00	0.88 KWD	0.76	8.71
Consumer Disc	1,545.03	1.06	1.75	0.33	5.68	3.91	0.16 KWD	0.98	0.00
Energy	1,011.77	3.09	1.00	2.20	1.39	-11.13	0.21 KWD	0.73	4.24
Technology	686.03	0.11	1.51	-0.63	7.90	-1.46	0.01 KWD	0.85	0.00
Utilities	478.95	0.00	0.55	-1.09	2.83	-3.19	0.20 KWD	1.83	14.91



What Move the GCC markets

Oil Prices

Oil prices steadied after the previous session's losses, as demand concerns owing to slow global economic growth were offset by fears of tighter global supply following Saudi Arabia's pledge to deepen output cuts. Brent crude futures were up 9 cents, or 0.1%, at \$76.38 a barrel.

Kuwait Market

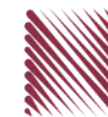
The market closed up today by + 0.84% at 6,905.87 value traded 78.4 million KD, Premier market value traded reached 71.6 million KD up by +1.01% at 7,648.62.

KSA Market

The market closed up today by + 0.64% at 11,316.87.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



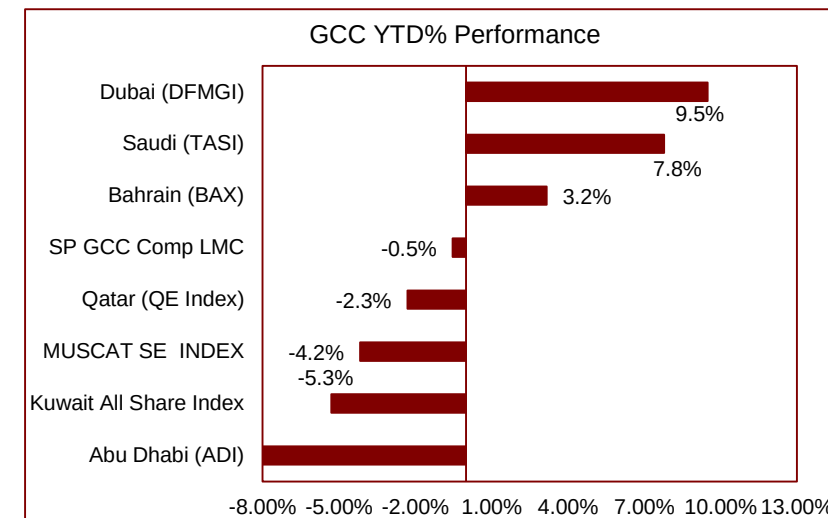
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.936	0.21	2.07	1.74	-6.93	-8.83	7.42 KWD	1.88	27.00
KFH	0.731	1.67	2.96	3.39	-2.65	-2.30	10.79 KWD	1.86	32.00
Zain	0.522	1.36	1.36	0.38	-3.33	-7.28	2.26 KWD	1.76	11.13
BOUBYAN BANK	0.614	1.66	2.33	2.33	1.22	-18.44	2.43 KWD	2.74	34.00
Agility	0.615	0.49	1.32	0.65	-0.97	-14.58	1.65 KWD	0.86	22.17
Saudi Arabia									
ARAMCO	32.60	1.24	3.00	3.49	11.02	11.71	7,877.10 SAR	5.28	14.03
SABIC	89.70	-0.44	1.59	1.70	-0.66	0.34	269.10 SAR	1.44	35.00
STC	42.95	0.59	1.66	-0.69	7.24	17.35	214.75 SAR	2.87	17.52
AL-RAJHI BANK	73.30	-1.08	1.38	3.68	-0.27	-2.53	292.80 SAR	2.95	17.08
NCB	37.15	-0.40	1.36	0.68	8.57	-1.43	222.00 SAR	1.29	11.99
United Arab Emirates									
ETISALAT.AD	22.60	-1.48	0.44	-2.08	2.45	-1.14	206.60 AED	5.10	21.10
FAB.AD	12.96	0.47	2.05	2.05	0.62	-24.21	143.19 AED	1.28	12.20
EMIRATES NBD	13.90	0.72	1.83	1.83	5.70	6.92	87.18 AED	0.91	5.21
DB ISLAMIC BK	5.32	0.38	0.95	1.14	1.72	-6.67	38.74 AED	0.96	7.44
EMAAR PROPERT	6.07	-0.49	0.17	-1.30	8.39	3.58	53.39 AED	0.75	6.37
Qatar									
QNB	16.28	-0.18	1.37	1.69	1.31	-9.56	148.19 QAR	1.46	10.60
INDUSTRIES QAT	12.19	-0.49	1.58	1.75	-6.23	-4.84	71.73 QAR	1.96	9.86
QA ISLAMIC BK	18.33	1.38	3.50	4.62	3.09	-1.24	42.05 QAR	1.58	10.87
MASRAF AL RAYA	2.69	1.05	3.62	5.65	-8.83	-15.04	24.64 QAR	1.05	20.15
MESAIEED PETRO	2.05	1.23	5.13	4.16	6.82	-3.57	24.99 QAR	1.53	15.69
OMAN									
BANK MUSCAT	0.266	0.00	0.76	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	1.19	7.69
BANK DHOFAR	0.175	0.00	0.00	0.00	9.38	0.00	0.52 QAR	0.73	14.93
NAT BANK OF OMAN	0.270	-0.74	-1.10	-1.10	0.75	-6.57	0.45 QAR	0.69	12.71
OMINVEST	0.370	0.00	0.00	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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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.84 %The leading sector best performance indices today are Energy 3.09 % Health care 1.95 % Consumer services 1.6 % respectively.

KSA

Saudi Armco has a positive performance today by + 1.24 %, SABIC have negative performance today by -0.44 %. STC has a positive performance today by + 0.59 %, Al Rajhi Bank have negative performance today by -1.08 %

U.A.E

ETISALAT .AD have negative performance today by -1.48 %, FAB.AD has a positive performance today by + 0.47 %



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