



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, April 6th 2023

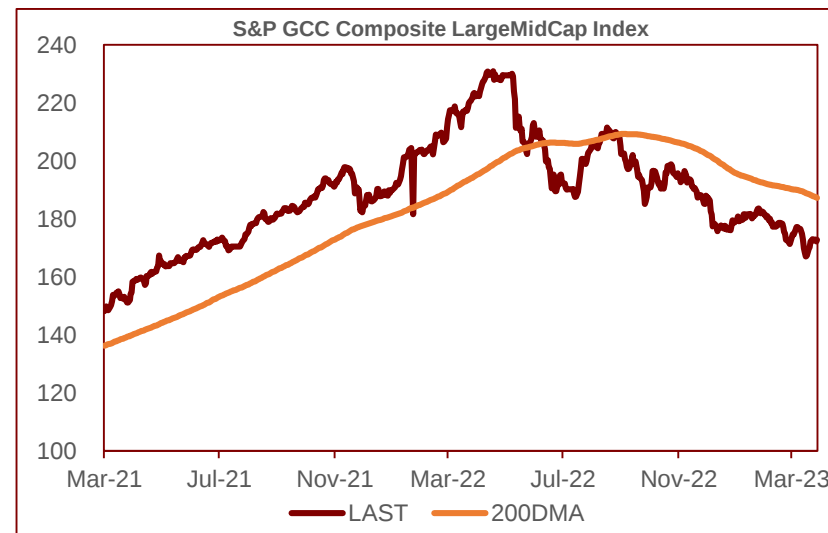




Market Watch

Thursday, April 6th 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,906.15	-0.13	2.98	2.98	2.98	4.08	10,144 SAR	1.80	17.63
Qatar (QE Index)	10,342.43	-0.16	1.27	1.27	1.27	-3.17	550 QAR	1.29	11.36
Dubai (DFMGI)	3,410.51	-0.44	-0.32	0.23	0.23	2.35	493 AED	1.18	22.09
Abu Dhabi (ADI)	9,461.69	-0.25	-0.08	0.43	0.43	-7.25	1,435 AED	1.74	20.84
Bahrain (BAX)	1,885.82	-0.07	-0.04	-0.04	-0.04	-0.50	19 BHD	1.72	18.00
MUSCAT SE INDEX	4,756.36	-0.94	-2.19	-2.19	-2.19	-2.08	5 OMR	1.04	13.25
SP GCC Comp LMC	177.35	-0.42	1.89	2.12	2.12	-0.80			
SP UAE PRICE INDEX	129.43	-0.67	-0.01	1.14	1.14	-5.87			
Developed Markets									
MSCI World Index	2,790.38	0.22	1.10	-0.05	-0.05	7.20			
U.S. (S&P 500)	4,105.02	0.36	1.34	-0.10	-0.10	6.92			
U.K. (FTSE 100)	7,741.56	1.03	1.59	1.44	1.44	3.89			
Japan (Topix)	1,965.44	-1.14	-1.11	-2.11	-2.11	3.68			
Emerging Markets									
MSCI EM Index	987.07	-0.35	-0.14	-0.59	-0.59	2.93			
China (SSE Composite)	3,327.65	0.00	1.58	1.22	1.22	7.23			
India (Sensex)	59,832.97	0.24	3.23	1.43	1.43	-1.66			
Kuwait									
Kuwait All Share Index	6,969.18	-0.34	-1.16	-1.16	-1.16	-4.43	45.15 KWD	1.64	21.54
Kuwait Premier Index	7,725.24	-0.40	-1.23	-1.23	-1.23	-4.81	35.32 KWD	1.63	21.54
Kuwait Main Index	5,455.81	-0.04	-0.82	-0.82	-0.82	-2.52	9.84 KWD	1.66	21.56
NIC 50	8,732.88	0.11	-1.24	-1.24	-1.24	-3.86	28.60 KWD	1.61	20.54
Kuwait Sector									
Banking	1,728.52	-0.47	-1.39	-1.39	-1.39	-3.65	29.12 KWD	1.27	22.54
Telecom	1,118.97	-0.26	-1.17	-1.17	-1.17	-5.29	3.43 KWD	1.91	11.97
Industrials	959.01	-0.60	-2.83	-2.83	-2.83	-11.11	3.37 KWD	0.77	17.52
Financial services	1,199.93	-0.22	0.33	0.33	0.33	-4.56	3.50 KWD	0.66	19.94
Real estate	1,093.32	0.83	1.22	1.22	1.22	-9.55	2.38 KWD	0.52	12.76
Basic materials	844.85	-0.11	-1.44	-1.44	-1.44	-2.34	0.76 KWD	1.52	7.82
Health care	462.45	0.00	1.53	1.53	1.53	0.13	0.23 KWD	2.48	10.54
Consumer services	445.31	-1.36	0.01	0.01	0.01	-7.22	0.72 KWD	0.84	12.50
Insurance	1,916.37	-0.09	0.34	0.34	0.34	23.57	0.79 KWD	0.82	10.16
Consumer Disc	1,438.48	0.74	-1.61	-1.61	-1.61	-3.25	0.14 KWD	0.90	0.00
Energy	998.16	0.17	0.03	0.03	0.03	-12.33	0.21 KWD	0.59	4.45
Technology	632.92	0.00	-0.46	-0.46	-0.46	-9.09	0.01 KWD	0.78	0.00
Utilities	457.89	-0.57	-1.70	-1.70	-1.70	-7.45	0.19 KWD	1.64	13.23



What Move the GCC markets

Oil Prices

Oil prices were little changed on Thursday but posted a third weekly gain as markets weighed further production cuts targeted by OPEC+ and falling U.S. oil inventories against fears about the global economic outlook, Brent crude settled down 13 cents, or 0.2%, at \$84.86 a barrel.

Kuwait Market

The market closed down today by - 0.34% at 6,969.18 value traded 27.5 million KD, Premier market value traded reached 24.4 million KD down by - 0.40% at 7,725.24.

KSA Market

The market closed down today by - 0.13% at 10,906.15.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



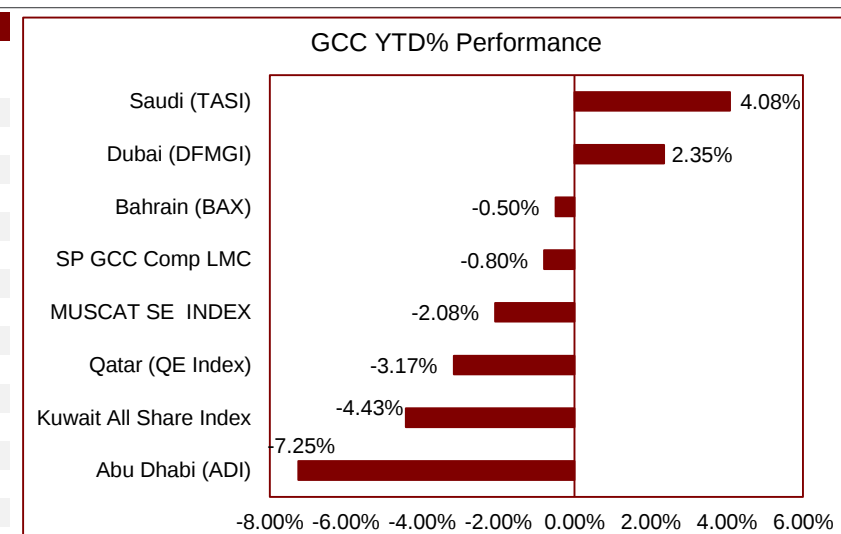
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.975	-0.81	-3.05	-3.05	-3.05	-5.03	7.73 KWD	1.90	27.00
KFH	0.739	-0.67	-1.59	-1.59	-1.59	-1.23	10.91 KWD	1.85	32.00
Zain	0.542	0.00	0.37	0.37	0.37	-3.73	2.34 KWD	1.91	11.97
BOUBAYAN BANK	0.651	0.15	1.24	1.24	1.24	-18.42	2.43 KWD	2.56	34.00
Agility	0.578	-1.20	-6.92	-6.92	-6.92	-19.72	1.55 KWD	0.92	22.27
Saudi Arabia									
ARAMCO	32.65	0.46	1.08	1.08	1.08	1.71	7,183.00 SAR	4.96	12.23
SABIC	92.60	-1.17	2.55	2.55	2.55	3.58	277.80 SAR	1.49	35.00
STC	41.15	0.37	2.75	2.75	2.75	12.43	205.75 SAR	2.79	16.82
AL-RAJHI BANK	75.90	0.13	3.27	3.27	3.27	0.93	303.60 SAR	3.03	19.43
NCB	49.65	-0.50	8.29	8.29	8.29	-1.68	222.33 SAR	1.33	12.18
United Arab Emirates									
ETISALAT.AD	22.72	-0.53	1.43	2.99	2.99	-0.61	206.60 AED	5.10	21.10
FAB.AD	13.04	-0.46	-0.61	1.24	1.24	-23.74	143.84 AED	1.25	11.05
EMIRATES NBD	13.30	-0.37	0.76	1.14	1.14	2.31	84.01 AED	0.90	6.72
DB ISLAMIC BK	5.26	-0.38	-1.87	0.57	0.57	-7.72	38.16 AED	0.92	7.53
EMAAR PROPERT	5.65	-1.40	-1.22	0.89	0.89	-3.58	50.03 AED	0.73	6.79
Qatar									
QNB	16.20	-0.55	0.81	0.81	0.81	-10.00	150.86 QAR	1.42	11.27
INDUSTRIES QAT	13.19	0.00	1.46	1.46	1.46	2.97	80.46 QAR	1.90	9.05
QA ISLAMIC BK	18.50	-1.60	4.05	4.05	4.05	-0.32	44.07 QAR	1.60	11.45
MASRAF AL RAYA	2.77	-1.04	-6.40	-6.40	-6.40	-12.77	25.94 QAR	1.07	17.55
MESAIEED PETRO	1.97	-0.46	2.40	2.40	2.40	-7.57	24.90 QAR	1.42	13.97
OMAN									
BANK MUSCAT	0.273	-0.36	-0.73	-0.73	-0.73	-0.73	2.05 OMR	0.92	8.33
OMANTEL	1.055	18.81	-4.09	-4.09	-4.09	14.67	0.79 OMR	1.25	7.69
BANK DHOFAR	0.155	0.00	-3.12	-3.12	-3.12	-11.43	0.46 QAR	0.65	14.93
NAT BANK OF OMAN	0.260	-2.99	-2.99	-2.99	-2.99	-10.03	0.42 QAR	0.66	12.71
OMINVEST	0.410	-6.39	-17.34	-17.34	-17.34	-2.38	0.27 QAR	0.77	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
29-March 23	24.80%	16.29%	0.06%	1.37%	0.41%	4.59%	17.70%	14.39%	5.93%	5.11%
5-April 23	24.85%	16.26%	0.06%	1.38%	0.41%	4.65%	17.70%	14.34%	6.07%	5.07%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.34 %The leading sector bottom performance indices today are Consumer services -1.36 % Industrials -0.6 % Utilities -0.57 % respectively

KSA

Saudi Armco has a positive performance today by + 0.46 %, SABIC has a negative performance today by -1.17 %, STC has a positive performance today by + 0.37 %, Al Rajhi Bank has a positive performance today by + 0.13 %

U.A.E

ETISALAT .AD has a negative performance today by -0.53 %, FAB.AD has a negative performance today by -0.46 %



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