

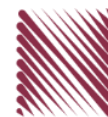


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, February 6th 2023

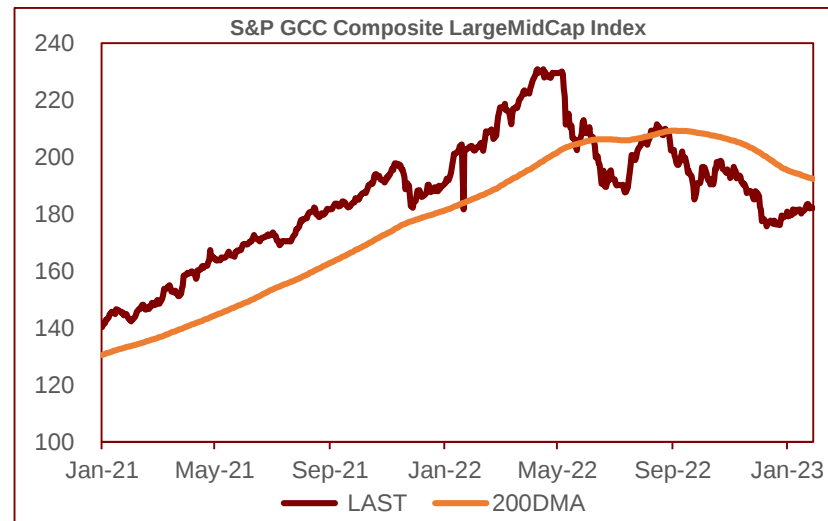




Market Watch

Monday, February 6, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,555.71	-0.03	-1.37	-2.20	0.74	0.74	9,887 SAR	1.71	15.03
Qatar (QE Index)	10,711.48	0.53	0.13	-2.02	0.28	0.28	544 QAR	1.36	12.09
Dubai (DFMGI)	3,400.37	0.52	1.04	2.94	1.93	1.93	490 AED	1.21	12.93
Abu Dhabi (ADI)	10,001.55	0.71	1.45	1.94	-2.05	-2.05	1,435 AED	1.98	20.72
Bahrain (BAX)	1,935.58	-0.02	0.75	0.38	2.13	2.13	20 BHD	1.66	15.28
MUSCAT SE INDEX	4,754.44	0.28	0.74	1.09	-2.12	-2.12	5 OMR	0.96	13.25
SP GCC Comp LMC	180.07	0.34	-0.21	-0.74	0.72	0.72			
SP UAE PRICE INDEX	138.35	0.81	2.27	3.33	0.62	0.62			
Developed Markets									
MSCI World Index	2,793.59	-0.96	-1.90	0.31	7.33	7.33			
U.S. (S&P 500)	4,111.08	-0.61	-1.64	0.85	7.07	7.07			
U.K. (FTSE 100)	7,836.71	-0.82	0.21	0.84	5.17	5.17			
Japan (Topix)	1,979.22	0.45	0.71	0.20	4.63	4.63			
Emerging Markets									
MSCI EM Index	1,014.49	-2.33	-2.97	-1.65	6.08	6.08			
China (SSE Composite)	3,238.70	-0.76	-1.43	-0.52	4.84	4.84			
India (Sensex)	60,506.90	-0.55	0.96	1.61	-0.55	-0.55			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,402.32	0.89	0.98	1.72	1.51	1.51	47.94 KWD	2.16	28.41
Kuwait Premier Index	8,237.85	0.95	0.95	1.89	1.51	1.51	37.77 KWD	2.29	23.82
Kuwait Main Index	5,682.54	0.67	1.10	1.05	1.53	1.53	10.17 KWD	1.66	45.70
NIC 50	9,236.40	1.01	0.94	1.88	1.50	8.38	28.60 KWD	2.27	22.82
Kuwait Sector									
Banking	1,852.09	1.28	1.41	2.14	3.24	3.24	31.23 KWD	1.37	24.82
Telecom	1,230.82	1.44	1.54	2.77	4.18	4.18	3.84 KWD	2.03	12.07
Industrials	988.72	-0.22	-0.20	0.90	-8.36	-8.36	3.47 KWD	0.78	18.26
Financial services	1,263.11	-0.10	-0.05	0.74	0.47	0.47	3.61 KWD	0.72	16.52
Real estate	1,183.11	-0.94	-0.86	-0.48	-2.12	-2.12	2.58 KWD	0.59	23.54
Basic materials	863.11	-0.11	-0.39	0.00	-0.23	-0.23	0.77 KWD	1.28	8.36
Health care	441.27	2.82	3.70	-0.55	-4.46	-4.46	0.22 KWD	2.35	13.01
Consumer services	480.96	1.30	1.16	0.28	0.21	0.21	0.71 KWD	0.95	11.31
Insurance	1,568.77	0.39	0.19	0.97	1.16	1.16	0.65 KWD	0.83	9.50
Consumer Disc	1,399.17	0.29	-0.97	-0.32	-5.90	-5.90	0.15 KWD	0.96	0.00
Energy	1,093.45	-0.58	-0.70	-0.46	-3.96	-3.96	0.23 KWD	0.61	4.94
Technology	734.05	0.00	2.96	5.54	5.43	5.43	0.01 KWD	0.90	0.00
Utilities	481.58	0.00	1.67	0.55	-2.66	-2.66	0.20 KWD	1.69	15.05



What Move the GCC markets

Oil Prices

Oil prices inched higher on Monday, recovering from an 8% fall last week to more than three-week lows, driven by expectations slower growth in major economies may limit fuel use. Brent crude futures rose 43 cents, or 0.5, to \$80.37 a barrel.

Kuwait Market

The market closed up today by + 0.89% at 7,402.32 value traded 70.2 million KD, Premier market value traded reached 58.6 million KD up by + 0.95% at 8,237.85.

KSA Market

The market closed down today by – 0.03% at 10,555.71.

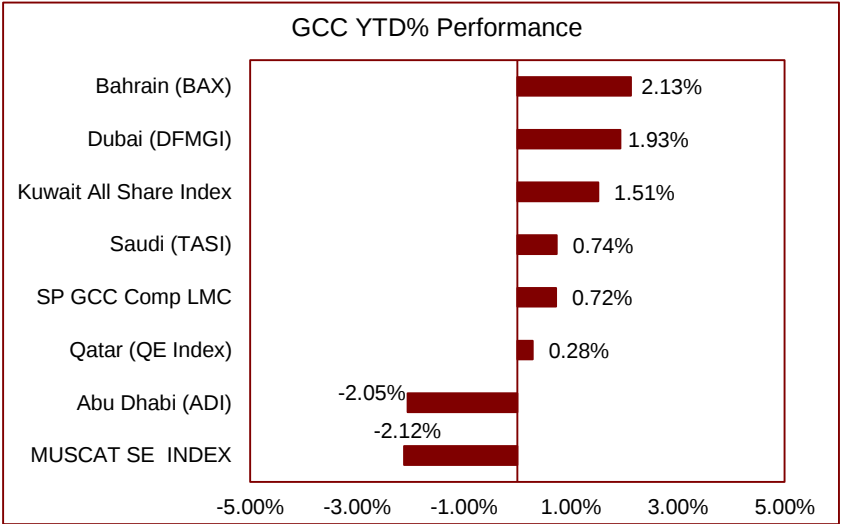


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.130	0.89	0.98	3.01	4.82	4.82	8.55 KWD	2.10	27.00
KFH	0.860	2.75	2.75	2.87	4.50	4.50	11.57 KWD	3.55	32.00
Zain	0.564	0.18	0.00	1.81	0.18	0.18	2.45 KWD	2.03	12.07
BOUBYAN BANK	0.791	0.25	-0.13	0.89	-0.88	-0.88	2.96 KWD	3.12	34.00
Agility	0.602	0.17	0.00	1.86	-16.39	-16.39	1.61 KWD	1.11	39.35
Saudi Arabia									
ARAMCO	32.00	-0.31	-1.84	-2.88	-0.31	-0.31	7,038.69 SAR	5.07	12.27
SABIC	91.30	1.11	-0.11	-1.51	2.13	2.13	273.85 SAR	1.50	35.00
STC	36.40	0.14	-1.89	-1.36	-0.55	-0.55	181.97 SAR	2.48	15.09
AL-RAJHI BANK	79.50	0.63	-1.24	-3.05	5.72	5.72	317.94 SAR	3.69	20.37
NCB	49.35	0.00	1.13	4.33	-2.28	-2.28	220.95 SAR	1.35	12.05
United Arab Emirates									
ETISALAT.AD	27.00	1.20	4.65	5.06	18.11	18.11	206.60 AED	5.10	21.10
FAB.AD	14.20	0.71	2.75	4.41	-16.96	-16.96	156.88 AED	1.36	12.03
EMIRATES NBD	13.60	0.74	2.26	5.02	4.62	4.62	85.91 AED	0.92	6.87
DB ISLAMIC BK	5.62	0.72	0.90	1.26	-1.40	-1.40	40.69 AED	0.98	8.04
EMAAR PROPERT	5.55	0.36	0.54	-0.18	-5.29	-5.29	49.06 AED	0.70	6.39
Qatar									
QNB	17.50	-2.34	1.04	-2.78	-2.78	-2.78	160.84 QAR	1.54	12.18
INDUSTRIES QAT	13.88	2.81	0.58	-1.21	8.35	8.35	83.56 QAR	2.07	8.84
QA ISLAMIC BK	19.04	-0.31	-0.83	-3.20	2.59	2.59	44.77 QAR	1.65	11.79
MASRAF AL RAYA	2.69	1.93	1.13	-1.50	-15.20	-15.20	24.88 QAR	1.04	17.06
MESAIEED PETRO	2.13	0.24	-2.02	-0.93	0.14	0.14	26.63 QAR	1.56	14.12
OMAN									
BANK MUSCAT	0.290	1.75	3.57	5.07	5.45	5.45	2.18 OMR	1.00	8.33
OMANTEL	0.964	8.56	-1.23	1.69	4.78	4.78	0.72 OMR	1.22	7.69
BANK DHOFAR	0.145	0.00	-3.33	-3.33	-17.14	-17.14	0.44 QAR	0.61	14.93
NAT BANK OF OMAN	0.280	0.00	1.82	2.19	-3.11	-3.11	0.46 QAR	0.78	12.71
OMINVEST	0.436	4.31	4.31	4.31	3.81	3.81	0.29 QAR	0.87	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, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is up today by + 0.89 %The leading sector best performance indices today are Health care 2.82 % Telecom 1.44 % Consumer services 1.3 % respectively

KSA
Saudi Armco has a negative performance today by -0.31 %, SABIC has a positive performance today by + 1.10 %, STC has a positive performance today by + 0.14 %, Al Rajhi Bank has a positive performance today by + 0.63 %

U.A.E
ETISALAT .AD has a positive performance today by + 1.2 %, FAB.AD has a positive performance today by + 0.71 %



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw