



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, March 6th 2023





Market Watch

Monday, March 6th 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,447.96	0.35	1.66	3.42	-0.29	-0.29	9,844 SAR	1.65	16.40
Qatar (QE Index)	10,695.04	0.69	0.69	1.17	0.13	0.13	541 QAR	1.35	11.44
Dubai (DFMGI)	3,456.18	1.05	0.59	0.54	3.60	3.60	496 AED	1.20	19.23
Abu Dhabi (ADI)	9,996.73	0.91	1.30	1.54	-2.10	-2.10	1,435 AED	1.93	23.48
Bahrain (BAX)	1,912.02	0.08	-0.92	-1.03	0.88	0.88	20 BHD	1.73	18.00
MUSCAT SE INDEX	4,833.15	-0.42	0.25	1.68	-0.50	-0.50	5 OMR	0.97	13.25
SP GCC Comp LMC	177.18	0.55	1.46	2.76	-0.89	-0.89			
SP UAE PRICE INDEX	137.27	0.95	0.73	0.75	-0.16	-0.16			

Developed Markets

MSCI World Index	2,764.64	0.24	1.65	1.84	6.22	6.22			
U.S. (S&P 500)	4,048.42	0.07	1.68	1.97	5.44	5.44			
U.K. (FTSE 100)	7,929.79	-0.22	-0.18	0.68	6.42	6.42			
Japan (Topix)	2,044.30	0.84	2.10	2.17	7.65	7.65			

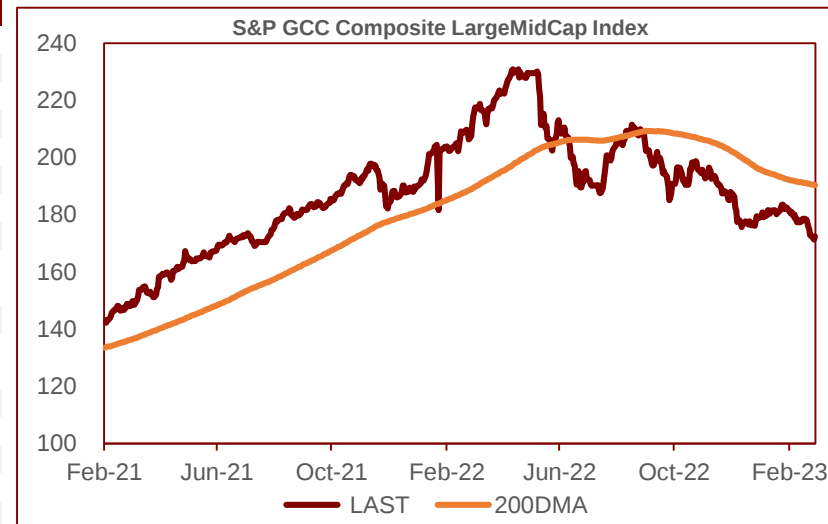
Emerging Markets

MSCI EM Index	993.74	0.58	1.40	3.08	3.91	3.91			
China (SSE Composite)	3,324.47	-0.19	0.34	1.29	7.53	7.53			
India (Sensex)	60,224.46	0.69	2.23	2.14	-1.01	-1.01			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,310.99	-0.12	0.33	0.92	0.26	0.26	47.31 KWD	1.76	27.83
Kuwait Premier Index	8,166.75	-0.06	0.53	1.20	0.63	0.63	37.36 KWD	1.78	23.34
Kuwait Main Index	5,528.68	-0.40	-0.58	-0.36	-1.22	-1.22	9.95 KWD	1.69	44.79
NIC 50	9,120.59	-0.12	0.52	1.19	0.62	0.41	28.60 KWD	1.76	22.34

Kuwait Sector

Banking	1,837.89	0.15	0.75	1.55	2.45	2.45	30.96 KWD	1.29	24.34
Telecom	1,165.47	-0.91	-0.86	-0.51	-1.35	-1.35	3.58 KWD	1.98	11.79
Industrials	989.34	-0.33	0.16	-0.11	-8.30	-8.30	3.48 KWD	0.76	18.40
Financial services	1,242.24	-0.59	-0.43	0.50	-1.19	-1.19	3.54 KWD	0.68	17.68
Real estate	1,124.44	-1.19	-1.07	-1.54	-6.97	-6.97	2.45 KWD	0.56	21.88
Basic materials	846.28	-0.33	-0.33	0.26	-2.18	-2.18	0.76 KWD	1.28	8.19
Health care	460.03	0.00	0.00	0.00	-0.39	-0.39	0.23 KWD	2.46	13.39
Consumer services	475.46	-0.29	-1.07	-0.65	-0.94	-0.94	0.74 KWD	0.90	12.15
Insurance	1,631.52	0.52	-0.01	0.24	5.20	5.20	0.67 KWD	0.82	10.12
Consumer Disc	1,459.57	-0.31	0.12	0.21	-1.83	-1.83	0.14 KWD	0.95	0.00
Energy	988.12	-1.19	-2.59	-2.92	-13.21	-13.21	0.21 KWD	0.54	4.57
Technology	668.57	0.00	3.49	-1.29	-3.97	-3.97	0.01 KWD	0.82	0.00
Utilities	476.32	-1.09	-0.55	-0.55	-3.72	-3.72	0.20 KWD	1.68	14.88



What Move the GCC markets

Oil Prices

Oil prices opened lower on Monday after China set a modest target for economic growth this year of around 5%, lower than market expectations of 5.5% growth in the world's second- largest oil consumer. Brent crude futures were trading down 50 cents, or 0.6%, at \$85.33 a barrel

Kuwait Market

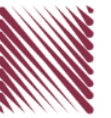
The market closed down today by - 0.12% at 7,310.99 value traded 28.1 million KD, Premier market value traded reached 23.4 million KD down by - 0.06% at 8,166.75.

KSA Market

The market closed up today by + 0.35% at 10,447.96.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



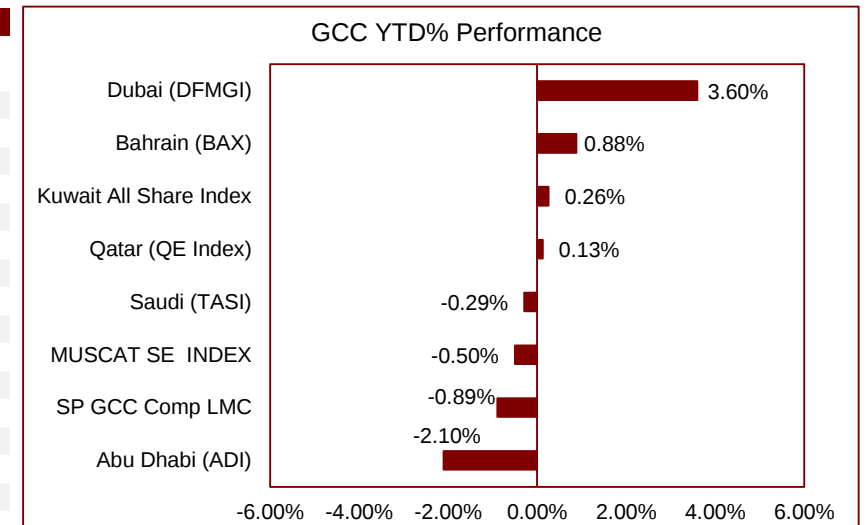
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.119	0.99	2.19	4.58	3.80	3.80	8.45 KWD	2.08	27.00
KFH	0.868	0.23	0.81	1.28	5.47	5.47	11.65 KWD	1.97	32.00
Zain	0.551	-1.08	-0.90	-1.43	-2.13	-2.13	2.38 KWD	1.98	11.79
BOUBYAN BANK	0.752	-1.31	-1.05	-1.70	-5.76	-5.76	2.81 KWD	2.96	34.00
Agility	0.601	-0.66	0.00	-0.33	-16.53	-16.53	1.61 KWD	1.11	39.28
Saudi Arabia									
ARAMCO	31.95	-0.16	0.63	0.47	-0.47	-0.47	7,029.00 SAR	5.06	12.23
SABIC	91.20	0.11	0.88	3.05	2.01	2.01	273.60 SAR	1.50	35.00
STC	36.50	0.55	1.53	3.84	-0.27	-0.27	182.50 SAR	2.47	14.89
AL-RAJHI BANK	75.60	0.67	2.58	7.54	0.53	0.53	302.40 SAR	3.02	19.26
NCB	47.60	0.53	2.15	0.74	-5.74	-5.74	213.15 SAR	1.27	11.56
United Arab Emirates									
ETISALAT.AD	25.60	0.31	0.00	0.39	11.99	11.99	206.60 AED	5.10	21.10
FAB.AD	14.30	1.42	1.27	1.56	-16.37	-16.37	157.98 AED	1.37	12.11
EMIRATES NBD	13.00	0.00	-4.06	-4.41	0.00	0.00	82.12 AED	0.88	6.57
DB ISLAMIC BK	5.75	1.05	0.35	0.17	0.88	0.88	41.63 AED	1.01	8.23
EMAAR PROPERT	5.79	1.94	3.76	3.39	-1.19	-1.19	51.18 AED	0.73	6.93
Qatar									
QNB	16.30	0.56	0.56	-3.26	-9.44	-9.44	149.81 QAR	1.43	11.34
INDUSTRIES QAT	14.30	1.42	1.42	2.73	11.63	11.63	86.09 QAR	2.06	9.81
QA ISLAMIC BK	18.61	0.05	0.05	0.05	0.27	0.27	43.76 QAR	1.61	11.52
MASRAF AL RAYA	2.76	1.03	1.03	2.15	-13.02	-13.02	25.52 QAR	1.07	17.50
MESAIEED PETRO	2.21	3.76	3.76	5.19	3.90	3.90	27.63 QAR	1.59	15.71
OMAN									
BANK MUSCAT	0.290	0.00	0.00	-0.68	5.45	5.45	2.18 OMR	0.98	8.33
OMANTEL	0.980	10.36	0.82	2.08	6.52	6.52	0.74 OMR	1.24	7.69
BANK DHOFAR	0.153	0.00	0.00	0.66	-12.57	-12.57	0.46 QAR	0.64	14.93
NAT BANK OF OMAN	0.270	-3.57	-1.46	1.50	-6.57	-6.57	0.44 QAR	0.69	12.71
OMINVEST	0.478	0.42	0.42	4.82	13.81	13.81	0.32 QAR	0.95	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
22-Feb 23	24.76%	16.65%	0.06%	1.34%	0.42%	4.46%	17.71%	15.22%	5.84%	5.12%
1-March 23	24.76%	16.62%	0.06%	1.33%	0.42%	4.46%	17.72%	15.18%	5.84%	5.17%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.12 %The leading sector bottom performance indices today are Real estate -1.19 % Energy -1.19 % Utilities -1.09 % respectively

KSA

Saudi Armco has a negative performance today by -0.16 %, SABIC has a positive performance today by + 0.11 %, STC has a positive performance today by + 0.55 %, Al Rajhi Bank has a positive performance today by + 0.67 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.31 %, FAB.AD has a positive performance today by + 1.42 %



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