



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, June 7th 2023



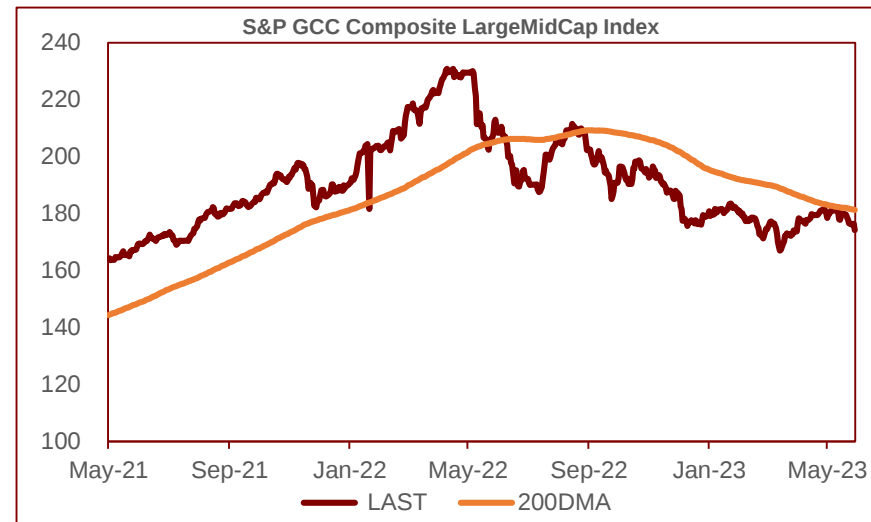


Market Watch

Wednesday, June 7, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,372.83	0.49	3.25	3.26	7.39	8.54	10,903 SAR	2.03	17.70
Qatar (QE Index)	10,296.28	0.40	0.86	1.39	0.82	-3.60	547 QAR	1.38	11.32
Dubai (DFMGI)	3,687.63	0.26	2.95	3.10	8.25	10.54	527 AED	1.38	18.09
Abu Dhabi (ADI)	9,377.43	0.22	0.12	-0.31	-0.56	-8.16	1,435 AED	1.77	20.59
Bahrain (BAX)	1,952.18	0.01	-0.30	-0.58	3.48	3.00	20 BHD	1.66	17.65
MUSCAT SE INDEX	4,650.60	-0.09	0.43	0.52	-4.37	-4.26	5 OMR	1.00	13.25
SP GCC Comp LMC	178.23	0.41	2.44	2.30	2.62	-0.31			
SP UAE PRICE INDEX	131.63	0.43	1.16	0.55	2.86	-4.27			
Developed Markets									
MSCI World Index	2,866.59	-0.40	1.23	2.36	2.69	10.14			
U.S. (S&P 500)	4,267.52	-0.38	1.10	2.10	3.85	11.15			
U.K. (FTSE 100)	7,624.34	-0.05	1.79	2.39	-0.10	2.32			
Japan (Topix)	2,206.30	-1.34	2.65	3.55	10.12	16.63			
Emerging Markets									
MSCI EM Index	995.41	0.70	3.49	3.85	0.52	4.08			
China (SSE Composite)	3,197.76	0.08	-0.21	-0.21	-2.29	3.51			
India (Sensex)	63,142.96	0.56	1.14	0.83	7.04	3.78			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	6,859.37	-0.67	1.06	0.92	-2.71	-5.93	44.45 KWD	1.66	17.63
Kuwait Premier Index	7,590.94	-0.75	1.48	1.28	-2.95	-6.47	34.64 KWD	1.61	17.42
Kuwait Main Index	5,413.55	-0.35	-0.56	-0.50	-1.59	-3.27	9.81 KWD	1.85	18.40
NIC 50	8,657.63	-0.71	1.47	1.27	-2.96	-4.69	28.60 KWD	1.59	16.42
Kuwait Sector									
Banking	1,671.51	-0.74	1.37	1.27	-4.64	-6.82	28.23 KWD	1.20	18.42
Telecom	1,098.88	-1.19	0.12	0.23	-2.95	-6.99	3.37 KWD	1.34	8.72
Industrials	974.35	-0.04	1.24	0.71	-1.28	-9.69	3.43 KWD	0.80	19.83
Financial services	1,186.25	-0.59	0.28	0.18	-0.81	-5.65	3.43 KWD	0.69	19.37
Real estate	1,120.79	-0.41	0.94	0.53	3.76	-7.27	2.43 KWD	0.54	20.87
Basic materials	934.94	-1.01	0.93	1.77	9.07	8.07	0.81 KWD	1.53	7.07
Health care	451.56	-1.52	0.00	-1.58	-0.86	-2.23	0.22 KWD	0.93	6.50
Consumer services	522.84	0.00	2.82	3.92	17.42	8.94	0.77 KWD	0.84	14.08
Insurance	2,120.40	-0.92	-1.41	-0.74	11.02	36.73	0.87 KWD	0.76	9.53
Consumer Disc	1,548.93	0.25	2.01	0.59	5.95	4.18	0.16 KWD	0.98	0.00
Energy	1,003.18	-0.85	0.14	1.33	0.53	-11.89	0.21 KWD	0.71	4.28
Technology	684.58	-0.21	1.29	-0.84	7.67	-1.67	0.01 KWD	0.85	0.00
Utilities	476.32	-0.55	0.00	-1.63	2.26	-3.72	0.20 KWD	1.82	14.82



What Move the GCC markets

Oil Prices

Oil prices were little changed in early Asia trade on Thursday as investors weighed demand concerns over a global economic slowdown against an expected fall in supply from Saudi output cuts. Brent crude futures dipped 1 cent at \$76.94 a barrel.

Kuwait Market

The market closed down today by – 0.67% at 6,859.37 value traded 75.6 million KD, Premier market value traded reached 62 million KD up down -0.75% at 7,590.94

KSA Market

The market closed up today by + 0.49% at 11,372.83.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



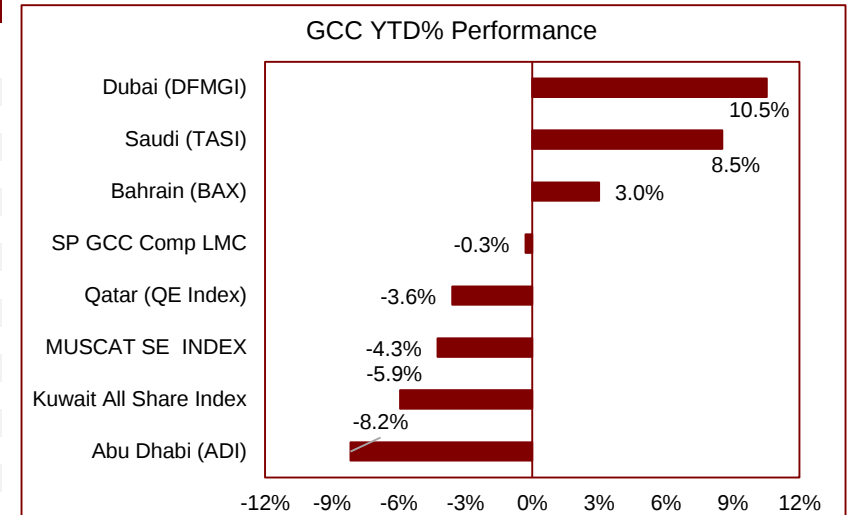
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.921	-1.60	0.44	0.11	-8.42	-10.29	7.31 KWD	1.85	27.00
KFH	0.727	-0.55	2.39	2.83	-3.18	-2.83	10.74 KWD	1.85	32.00
Zain	0.514	-1.53	-0.19	-1.15	-4.81	-8.70	2.23 KWD	1.73	10.96
BOUBYAN BANK	0.614	0.00	2.33	2.33	1.22	-18.44	2.43 KWD	2.74	34.00
Agility	0.614	-0.16	1.15	0.49	-1.13	-14.72	1.64 KWD	0.86	22.13
Saudi Arabia									
ARAMCO	32.40	-0.46	2.37	2.86	10.34	11.03	7,840.80 SAR	5.25	14.01
SABIC	89.20	-0.56	1.02	1.13	-1.22	-0.22	267.60 SAR	1.43	35.00
STC	43.00	0.12	1.78	-0.58	7.37	17.49	215.00 SAR	2.87	17.52
AL-RAJHI BANK	73.10	-0.14	1.11	3.39	-0.54	-2.79	292.40 SAR	2.95	17.06
NCB	37.85	2.30	3.27	2.57	10.61	0.43	227.10 SAR	1.32	11.94
United Arab Emirates									
ETISALAT.AD	22.66	0.71	0.71	-1.82	2.72	-0.87	206.60 AED	5.10	21.10
FAB.AD	12.94	-0.15	1.89	1.89	0.47	-24.33	142.95 AED	1.27	12.19
EMIRATES NBD	13.85	0.36	1.47	1.47	5.32	6.54	87.48 AED	0.91	5.23
DB ISLAMIC BK	5.31	-0.75	0.76	0.95	1.53	-6.84	38.45 AED	0.95	7.38
EMAAR PROPERT	6.14	1.66	1.32	-0.16	9.64	4.78	54.27 AED	0.76	6.47
Qatar									
QNB	16.15	0.62	0.56	0.87	0.50	-10.28	149.02 QAR	1.47	10.66
INDUSTRIES QAT	11.86	0.00	-1.17	-1.00	-8.77	-7.42	71.68 QAR	1.96	9.86
QA ISLAMIC BK	17.90	0.56	1.07	2.17	0.67	-3.56	42.25 QAR	1.59	10.94
MASRAF AL RAYA	2.61	-1.47	0.42	2.39	-11.64	-17.66	24.26 QAR	1.03	19.86
MESAIEED PETRO	2.01	0.85	2.87	1.93	4.53	-5.64	25.19 QAR	1.55	15.83
OMAN									
BANK MUSCAT	0.265	0.00	0.38	1.15	-3.64	-3.64	1.99 OMR	0.92	8.33
OMANTEL	0.972	9.46	1.25	0.83	-11.64	5.65	0.73 OMR	1.20	7.69
BANK DHOFAR	0.173	0.00	-1.14	-1.14	8.12	-1.14	0.52 QAR	0.73	14.93
NAT BANK OF OMAN	0.270	-1.82	-1.10	-1.10	0.75	-6.57	0.44 QAR	0.68	12.71
OMINVEST	0.366	-1.08	-1.08	-1.08	-26.21	-12.86	0.24 QAR	0.68	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
31-May 23	24.51%	15.66%	0.06%	1.36%	0.23%	4.59%	17.67%	13.99%	6.11%	4.76%
31-May 23	24.34%	15.37%	0.06%	1.35%	0.23%	4.57%	17.66%	13.9%	6.09%	4.72%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.67 %The leading sector bottom performance indices today are Health care -1.52 % Telecom -1.19 % Basic materials -1.01 % respectively

KSA

Saudi Armco have negative performance today by -0.46 %, SABIC have negative performance today by -0.55%. STC has a positive performance today by + 0.12 %, Al Rajhi Bank have negative performance today by -0.14 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.71 %, FAB.AD have negative performance today by -0.15 %



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