

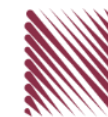


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, May 7th 2023



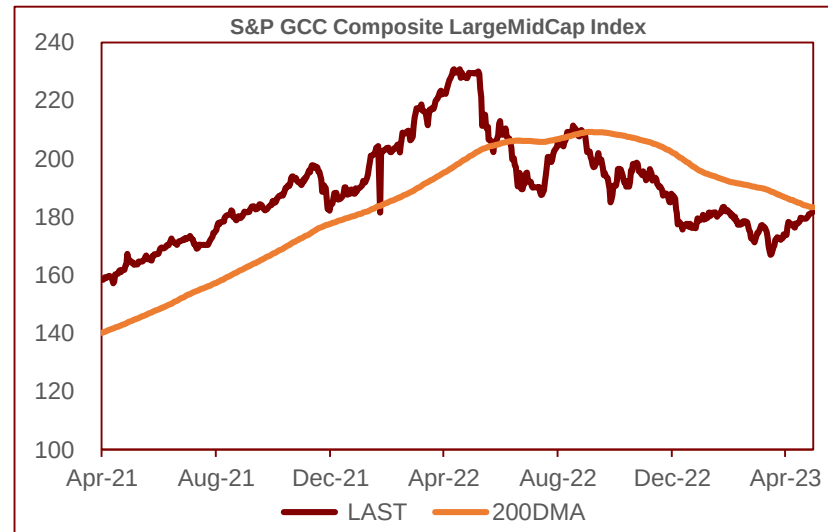


Market Watch

Sunday, May 7, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,256.65	1.24	2.66	-0.45	6.29	7.43	10,725 SAR	1.88	17.89
Qatar (QE Index)	10,673.01	0.31	5.78	4.83	4.51	-0.08	567 QAR	1.39	11.36
Dubai (DFMGI)	3,583.09	-0.21	2.74	1.08	5.18	7.40	513 AED	1.25	23.62
Abu Dhabi (ADI)	9,705.95	0.33	1.55	-0.85	2.92	-4.95	1,435 AED	1.74	20.94
Bahrain (BAX)	1,900.32	-0.32	1.00	-0.21	0.73	0.27	20 BHD	1.63	18.00
MUSCAT SE INDEX	4,717.35	-0.15	-1.95	-0.02	-3.00	-2.88	5 OMR	1.02	13.25
SP GCC Comp LMC	181.10	0.78	1.92	-0.30	4.28	1.30			
SP UAE PRICE INDEX	135.75	0.31	2.52	-1.26	6.08	-1.27			
Developed Markets									
MSCI World Index	2,821.99	1.54	-0.25	-0.49	1.09	8.43			
U.S. (S&P 500)	4,136.25	1.85	-0.24	-0.80	0.66	7.73			
U.K. (FTSE 100)	7,778.38	0.98	-0.83	-1.17	1.92	4.38			
Japan (Topix)	2,075.53	0.00	3.37	0.88	3.60	9.72			
Emerging Markets									
MSCI EM Index	981.66	0.54	-1.54	0.47	-0.87	2.64			
China (SSE Composite)	3,334.50	-0.48	0.49	0.34	1.88	7.94			
India (Sensex)	61,054.29	-1.13	1.03	-0.10	3.50	0.35			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,033.56	0.00	0.63	-1.52	-0.24	-3.55	45.55 KWD	1.69	20.47
Kuwait Premier Index	7,777.96	-0.02	0.25	-1.70	-0.56	-4.16	35.57 KWD	1.68	20.38
Kuwait Main Index	5,564.49	0.07	2.29	-0.75	1.16	-0.58	9.98 KWD	1.72	20.85
NIC 50	8,864.77	0.06	0.24	-1.71	-0.57	-2.41	28.60 KWD	1.66	19.38
Kuwait Sector									
Banking	1,731.78	-0.06	0.38	-1.39	-1.20	-3.46	29.20 KWD	1.27	21.38
Telecom	1,168.77	0.04	2.89	-0.50	3.22	-1.07	3.59 KWD	1.47	9.48
Industrials	977.34	-0.20	-0.02	-2.80	-0.97	-9.41	3.45 KWD	0.79	17.83
Financial services	1,211.44	0.00	0.00	-1.54	1.29	-3.64	3.52 KWD	0.73	20.61
Real estate	1,094.93	0.15	-2.05	-4.32	1.36	-9.41	2.37 KWD	0.53	14.02
Basic materials	864.78	1.16	3.30	-3.05	0.89	-0.04	0.76 KWD	1.54	7.93
Health care	457.01	0.00	-1.18	0.00	0.33	-1.05	0.23 KWD	1.03	10.16
Consumer services	445.93	-1.22	-0.62	-2.41	0.15	-7.09	0.72 KWD	0.85	13.84
Insurance	2,109.94	-0.05	11.26	-0.18	10.47	36.05	0.87 KWD	0.76	10.00
Consumer Disc	1,461.46	1.37	2.29	0.29	-0.04	-1.71	0.14 KWD	0.89	0.00
Energy	978.17	-0.11	-2.01	-0.07	-1.98	-14.08	0.20 KWD	0.59	4.53
Technology	582.00	-4.65	-6.65	0.00	-8.47	-16.41	0.01 KWD	0.72	0.00
Utilities	476.32	1.69	2.84	3.43	2.26	-3.72	0.20 KWD	1.70	13.76



What Move the GCC markets

Oil Prices

Oil prices rose on Friday but fell for the third straight week after a sharp fall earlier this week ahead of benchmark interest rate rises and on concern that the U.S. banking crisis will slow the economy and sap fuel demand. Brent crude closed \$2.80, or 3.9% higher, at \$75.30 a barrel.

Kuwait Market

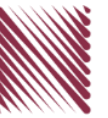
The market closed flat today at 7,033.56 value traded 28.6 million KD, Premier market value traded reached 25.6 million KD down by - 0.02% at 7,777.96.

KSA Market

The market closed up today by + 1.24 % at 11,256.65

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



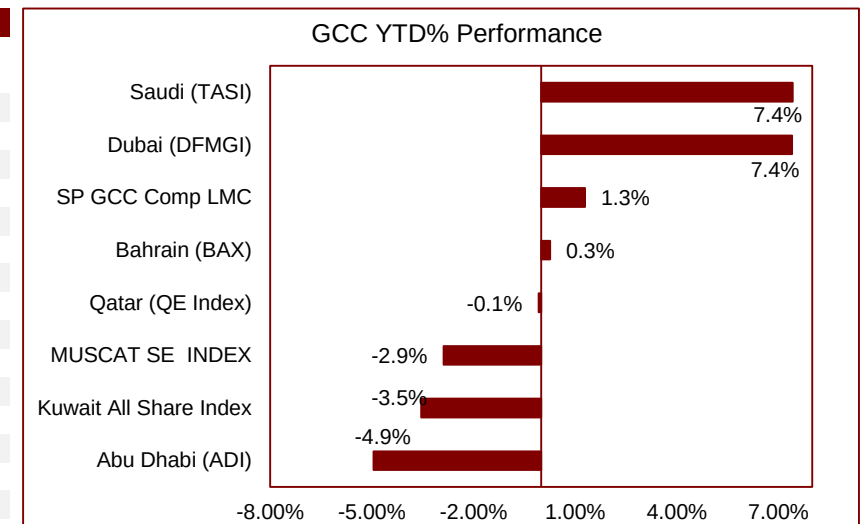
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	0.978	-0.20	1.56	-2.59	-2.76	-4.74	7.78 KWD	1.96	27.00
KFH	0.740	0.27	0.00	-0.13	-1.45	-1.09	10.90 KWD	1.88	32.00
Zain	0.561	0.00	2.00	-0.36	3.89	-0.36	2.43 KWD	1.97	12.39
BOUBYAN BANK	0.637	-0.47	1.11	-3.63	5.01	-15.39	2.54 KWD	2.84	34.00
Agility	0.606	0.17	1.34	-1.62	-2.42	-15.83	1.62 KWD	0.97	23.35
Saudi Arabia									
ARAMCO	35.75	2.00	8.83	-1.52	10.68	11.37	7,716.56 SAR	5.43	13.19
SABIC	90.20	1.35	-1.10	-2.91	-0.11	0.89	267.19 SAR	1.45	35.00
STC	44.00	1.50	3.53	-0.90	9.86	20.22	216.91 SAR	2.98	17.78
AL-RAJHI BANK	75.00	0.81	-0.79	-2.47	2.04	-0.27	297.81 SAR	3.02	17.34
NCB	37.24	0.91	-0.20	0.51	8.29	-1.68	220.48 SAR	1.33	11.82
United Arab Emirates									
ETISALAT.AD	23.40	-0.34	-0.17	-2.50	6.07	2.36	206.60 AED	5.10	21.10
FAB.AD	14.10	1.00	7.14	-0.56	9.47	-17.54	155.77 AED	1.39	13.28
EMIRATES NBD	14.05	0.00	8.08	-0.35	6.84	8.08	88.75 AED	0.93	5.31
DB ISLAMIC BK	5.59	1.45	5.27	0.54	6.88	-1.93	40.48 AED	1.00	7.77
EMAAR PROPERT	6.00	1.52	0.50	1.18	7.14	2.39	53.03 AED	0.77	7.21
Qatar									
QNB	17.13	1.00	10.52	11.96	6.60	-4.83	156.65 QAR	1.56	11.31
INDUSTRIES QAT	13.09	-1.06	0.38	1.08	0.69	2.19	80.04 QAR	1.89	8.98
QA ISLAMIC BK	18.66	2.70	5.01	4.30	4.95	0.54	42.93 QAR	1.65	11.40
MASRAF AL RAYA	2.69	0.30	-0.04	2.90	-8.87	-15.07	24.97 QAR	1.06	20.48
MESAIEED PETRO	2.02	-2.03	2.90	2.95	5.42	-4.84	25.96 QAR	1.46	14.39
OMAN									
BANK MUSCAT	0.270	0.00	-1.82	-1.10	-1.82	-1.82	2.03 OMR	0.93	8.33
OMANTEL	0.988	11.26	-2.66	-1.20	-10.18	7.39	0.75 OMR	1.17	7.69
BANK DHOFAR	0.158	-1.25	-1.25	1.94	-1.25	-9.71	0.47 QAR	0.66	14.93
NAT BANK OF OMAN	0.288	0.00	1.41	4.73	7.46	-0.35	0.47 QAR	0.73	12.71
OMINVEST	0.396	-1.00	-4.81	-2.46	-20.16	-5.71	0.27 QAR	0.74	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
19-April 23	24.85%	16.25%	0.06%	1.38%	0.42%	4.67%	17.70%	14.29%	6.13%	5.07%
26-April 23	24.86%	16.22%	0.06%	1.38%	0.43%	4.66%	17.70%	14.24%	6.14%	5.07%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0 %The leading sector best performance indices today are Utilities 1.69 % Consumer Disc 1.37 % Basic materials 1.16 % respectively

KSA

Saudi Armco has a positive performance today by + 2.0 %, SABIC has a positive performance today by + 1.34 %, STC has a positive performance today by + 1.5 %, Al Rajhi Bank has a positive performance today by + 0.81 %

U.A.E

ETISALAT .AD has a negative performance today by -0.34 %, FAB.AD has a positive performance today by + 1 %



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