



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, February 8th 2023

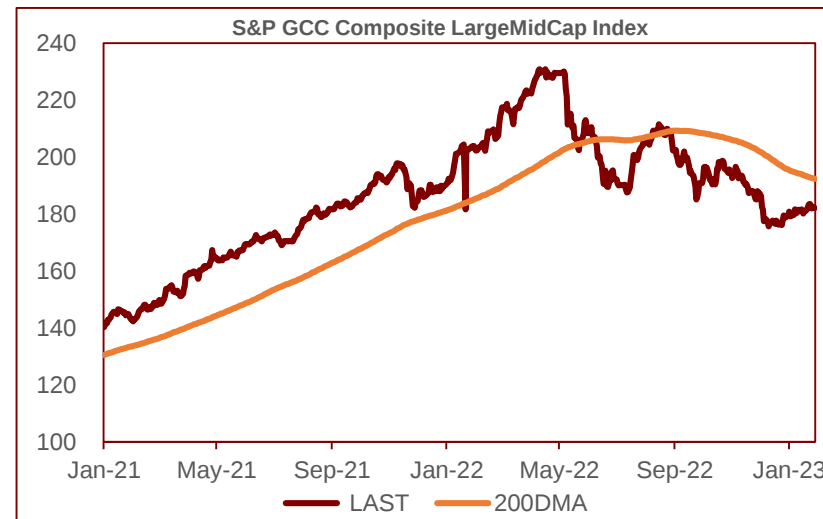




Market Watch

Wednesday, February 8, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,507.72	0.37	-1.81	-2.64	0.28	0.28	9,983 SAR	1.71	15.23
Qatar (QE Index)	10,502.40	-0.66	-1.83	-3.93	-1.67	-1.67	536 QAR	1.36	11.98
Dubai (DFMGI)	3,417.01	0.36	1.54	3.44	2.43	2.43	493 AED	1.21	18.42
Abu Dhabi (ADI)	10,007.57	0.04	1.51	2.00	-1.99	-1.99	1,435 AED	1.97	20.71
Bahrain (BAX)	1,935.69	0.05	0.75	0.39	2.13	2.13	20 BHD	1.60	15.75
MUSCAT SE INDEX	4,766.36	0.18	0.99	1.34	-1.88	-1.88	5 OMR	0.96	13.25
SP GCC Comp LMC	178.82	0.11	-0.90	-1.43	0.02	0.02			
SP UAE PRICE INDEX	138.82	0.07	2.62	3.68	0.96	0.96			
Developed Markets									
MSCI World Index	2,801.96	-0.66	-1.61	0.61	7.66	7.66			
U.S. (S&P 500)	4,117.86	-1.11	-1.48	1.01	7.25	7.25			
U.K. (FTSE 100)	7,885.17	0.26	0.83	1.46	5.82	5.82			
Japan (Topix)	1,983.97	0.03	0.96	0.44	4.88	4.88			
Emerging Markets									
MSCI EM Index	1,020.58	0.50	-2.39	-1.06	6.71	6.71			
China (SSE Composite)	3,232.11	-0.49	-1.63	-0.72	4.62	4.62			
India (Sensex)	60,663.79	0.63	1.22	1.87	-0.29	-0.29			
Kuwait									
Kuwait All Share Index	7,393.22	-0.10	0.86	1.59	1.39	1.39	47.84 KWD	1.78	28.87
Kuwait Premier Index	8,235.02	-0.04	0.92	1.85	1.47	1.47	37.71 KWD	1.80	23.87
Kuwait Main Index	5,655.36	-0.33	0.62	0.57	1.05	1.05	10.13 KWD	1.67	47.56
NIC 50	9,232.83	-0.02	0.91	1.84	1.46	8.34	28.60 KWD	1.78	22.87
Kuwait Sector									
Banking	1,850.44	-0.08	1.32	2.05	3.15	3.15	31.17 KWD	1.35	24.87
Telecom	1,218.99	-0.75	0.57	1.78	3.18	3.18	3.74 KWD	2.00	11.90
Industrials	995.77	0.94	0.51	1.62	-7.70	-7.70	3.49 KWD	0.80	18.44
Financial services	1,258.01	-0.12	-0.45	0.33	0.06	0.06	3.60 KWD	0.70	16.64
Real estate	1,181.67	-0.66	-0.98	-0.60	-2.24	-2.24	2.57 KWD	0.57	23.24
Basic materials	862.98	0.31	-0.41	-0.02	-0.25	-0.25	0.77 KWD	1.28	8.36
Health care	447.32	-0.07	5.12	0.82	-3.15	-3.15	0.22 KWD	2.35	13.55
Consumer services	472.38	-1.36	-0.65	-1.51	-1.58	-1.58	0.70 KWD	0.95	11.38
Insurance	1,574.13	0.31	0.53	1.32	1.50	1.50	0.65 KWD	0.83	9.50
Consumer Disc	1,403.73	-0.54	-0.65	0.00	-5.59	-5.59	0.14 KWD	0.94	0.00
Energy	1,068.20	-0.11	-2.99	-2.76	-6.18	-6.18	0.22 KWD	0.60	4.78
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 rose early on Wednesday, extending gains from the previous two days, as the dollar fell after Federal Reserve Chair Jerome Powell sounded less hawkish on interest rates than markets had expected and as U.S. crude stocks surprisingly fell. Brent crude futures inched up by 11 cents, or 0.1%, to \$83.80 a barrel.

Kuwait Market

The market closed down today by - 0.10% at 7,393.22 value traded 32.8 million KD, Premier market value traded reached 25.6 million KD down by - 0.04% at 8,235.02.

KSA Market

The market closed up today by + 0.37% at 10,507.72.

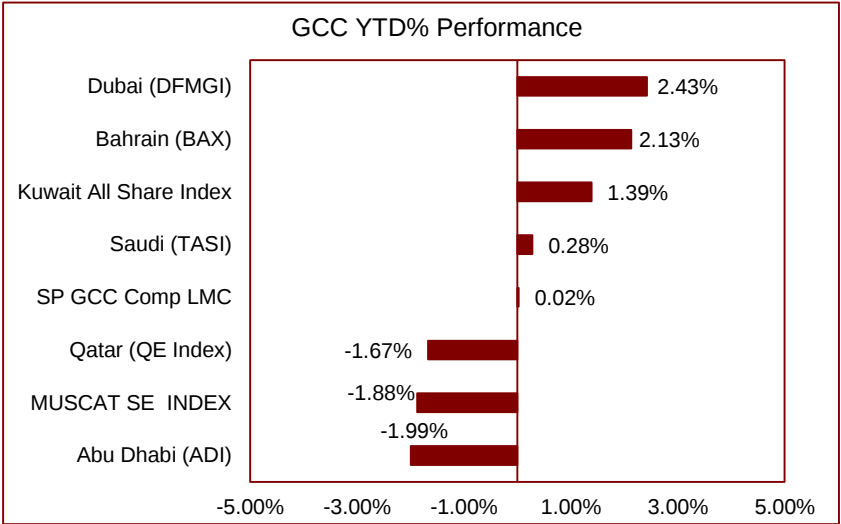


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.122	-0.18	0.27	2.28	4.08	4.08	8.48 KWD	2.09	27.00
KFH	0.867	0.00	3.58	3.71	5.35	5.35	11.64 KWD	1.97	32.00
Zain	0.556	-0.36	-1.42	0.36	-1.24	-1.24	2.41 KWD	2.00	11.90
BOUBYAN BANK	0.785	-0.25	-0.88	0.13	-1.63	-1.63	2.94 KWD	3.09	34.00
Agility	0.613	1.66	1.83	3.72	-14.86	-14.86	1.64 KWD	1.13	40.07
Saudi Arabia									
ARAMCO	32.50	1.25	-0.31	-1.37	1.25	1.25	7,150.57 SAR	5.15	12.27
SABIC	92.80	1.87	1.53	0.11	3.80	3.80	278.42 SAR	1.52	35.00
STC	36.10	-0.28	-2.70	-2.17	-1.37	-1.37	180.51 SAR	2.46	15.03
AL-RAJHI BANK	78.70	0.64	-2.24	-4.02	4.65	4.65	314.83 SAR	3.14	20.05
NCB	48.75	0.62	-0.10	3.07	-3.47	-3.47	218.32 SAR	1.30	11.83
United Arab Emirates									
ETISALAT.AD	26.86	-1.32	4.11	4.51	17.50	17.50	206.60 AED	5.10	21.10
FAB.AD	14.38	1.13	4.05	5.74	-15.91	-15.91	158.86 AED	1.38	12.18
EMIRATES NBD	13.55	-0.73	1.88	4.63	4.23	4.23	85.59 AED	0.92	6.85
DB ISLAMIC BK	5.65	0.53	1.44	1.80	-0.88	-0.88	40.91 AED	0.99	8.09
EMAAR PROPERT	5.66	1.98	2.54	1.80	-3.41	-3.41	50.03 AED	0.71	6.52
Qatar									
QNB	16.75	-0.89	-3.29	-6.94	-6.94	-6.94	154.71 QAR	1.47	11.66
INDUSTRIES QAT	14.01	0.79	1.52	-0.28	9.37	9.37	84.76 QAR	2.09	8.93
QA ISLAMIC BK	18.07	-2.38	-5.89	-8.13	-2.64	-2.64	42.70 QAR	1.57	11.18
MASRAF AL RAYA	2.66	-0.75	-0.08	-2.67	-16.21	-16.21	24.71 QAR	1.03	16.86
MESAIEED PETRO	2.07	-1.99	-4.92	-3.86	-2.82	-2.82	25.97 QAR	1.51	13.71
OMAN									
BANK MUSCAT	0.288	0.35	2.86	4.35	4.73	4.73	2.16 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	0.153	0.00	2.00	2.00	-12.57	-12.57	0.46 QAR	0.65	14.93
NAT BANK OF OMAN	0.272	0.74	-1.09	-0.73	-5.88	-5.88	0.44 QAR	0.76	12.71
OMINVEST	0.430	0.00	2.87	2.87	2.38	2.38	0.29 QAR	0.86	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, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is down today by -0.1 %The leading sector bottom performance indices today are Consumer services -1.36 % Telecom -0.75 % Real estate -0.66 % respectively

KSA
Saudi Armco has a positive performance today by + 1.25 %, SABIC has a positive performance today by + 1.86 %, STC has a negative performance today by -0.28 %, Al Rajhi Bank has a positive performance today by + 0.64 %

U.A.E
ETISALAT .AD has a negative performance today by -1.32 %, FAB.AD has a positive performance today by + 1.13 %



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