

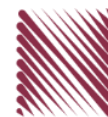


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, May 8th 2023



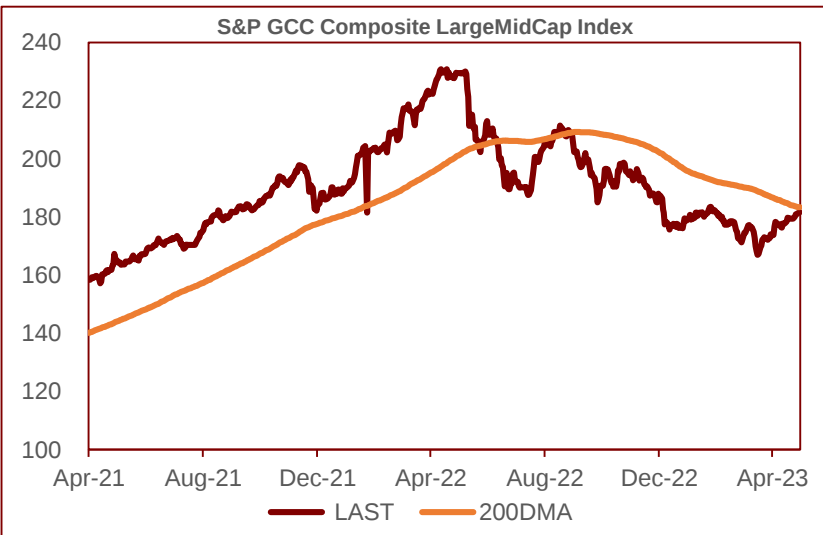


Market Watch

Monday, May 8, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,256.39	0.00	2.66	-0.45	6.29	7.42	10,856 SAR	1.89	18.31
Qatar (QE Index)	10,715.60	0.40	6.20	5.25	4.93	0.32	566 QAR	1.41	11.42
Dubai (DFMGI)	3,582.84	-0.01	2.74	1.07	5.17	7.40	513 AED	1.26	23.70
Abu Dhabi (ADI)	9,691.35	-0.15	1.39	-1.00	2.77	-5.09	1,435 AED	1.74	21.02
Bahrain (BAX)	1,913.74	0.71	1.71	0.49	1.44	0.97	20 BHD	1.63	18.00
MUSCAT SE INDEX	4,680.61	-0.78	-2.71	-0.79	-3.75	-3.64	5 OMR	1.02	13.25
SP GCC Comp LMC	181.02	-0.04	1.87	-0.34	4.23	1.26			
SP UAE PRICE INDEX	135.76	0.01	2.53	-1.25	6.09	-1.26			
Developed Markets									
MSCI World Index	2,827.38	0.19	-0.06	-0.30	1.29	8.63			
U.S. (S&P 500)	4,138.12	0.05	-0.20	-0.75	0.70	7.78			
U.K. (FTSE 100)	7,778.38	0.00	-0.83	-1.17	1.92	4.38			
Japan (Topix)	2,071.21	-0.21	3.15	0.67	3.38	9.49			
Emerging Markets									
MSCI EM Index	989.44	0.79	-0.76	1.27	-0.09	3.46			
China (SSE Composite)	3,395.00	1.81	2.31	2.16	3.73	9.90			
India (Sensex)	61,764.25	1.16	2.21	1.07	4.70	1.52			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,000.80	-0.47	0.16	-1.98	-0.71	-3.99	45.36 KWD	1.69	20.43
Kuwait Premier Index	7,725.36	-0.68	-0.43	-2.37	-1.23	-4.81	35.32 KWD	1.67	20.26
Kuwait Main Index	5,589.61	0.45	2.75	-0.30	1.61	-0.13	10.04 KWD	1.74	21.06
NIC 50	8,864.77	0.00	-0.44	-2.38	-1.24	-2.41	28.60 KWD	1.65	19.26
Kuwait Sector									
Banking	1,725.13	-0.38	-0.01	-1.77	-1.58	-3.83	29.08 KWD	1.26	21.26
Telecom	1,141.20	-2.36	0.46	-2.85	0.79	-3.41	3.50 KWD	1.44	9.27
Industrials	983.33	0.61	0.59	-2.20	-0.37	-8.86	3.47 KWD	0.81	18.54
Financial services	1,199.83	-0.96	-0.96	-2.49	0.32	-4.57	3.48 KWD	0.72	20.45
Real estate	1,093.45	-0.14	-2.18	-4.45	1.23	-9.54	2.37 KWD	0.53	13.73
Basic materials	859.54	-0.61	2.67	-3.64	0.28	-0.64	0.77 KWD	1.53	7.88
Health care	457.01	0.00	-1.18	0.00	0.33	-1.05	0.23 KWD	1.03	10.16
Consumer services	459.65	3.08	2.44	0.60	3.23	-4.23	0.73 KWD	0.85	13.81
Insurance	2,111.45	0.07	11.34	-0.11	10.55	36.15	0.87 KWD	0.77	9.87
Consumer Disc	1,466.32	0.33	2.63	0.62	0.30	-1.38	0.14 KWD	0.91	0.00
Energy	977.90	-0.03	-2.03	-0.10	-2.00	-14.11	0.20 KWD	0.58	4.53
Technology	582.00	0.00	-6.65	0.00	-8.47	-16.41	0.01 KWD	0.72	0.00
Utilities	476.32	0.00	2.84	3.43	2.26	-3.72	0.20 KWD	1.70	13.76



What Move the GCC markets

Oil Prices

Oil rose on Monday as easing U.S. recession fears shifted market focus to tightening supplies, offering support after crude prices registered three straight weekly declines for the first time since November, Brent crude was up \$1.36, or 1.8%, at \$76.66 a barrel.

Kuwait Market

The market closed down today by -0.47% at 7,000.80 value traded 34.4 million KD, Premier market value traded reached 28.2 million KD down by - 0.68% at 7,725.36.

KSA Market

The market closed flat today at 11,256.39



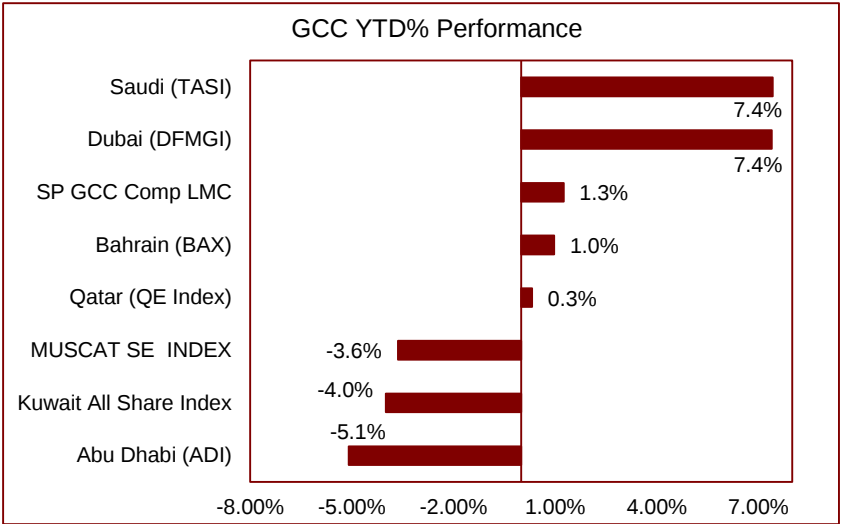
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.971	-0.72	0.83	-3.29	-3.45	-5.42	7.71 KWD	1.95	27.00
KFH	0.735	-0.68	-0.68	-0.81	-2.12	-1.76	10.86 KWD	1.87	32.00
Zain	0.543	-3.21	-1.27	-3.55	0.56	-3.55	2.35 KWD	1.91	11.99
BOUBYAN BANK	0.633	-0.63	0.48	-4.24	4.35	-15.92	2.51 KWD	2.83	34.00
Agility	0.613	1.16	2.51	-0.49	-1.29	-14.86	1.64 KWD	0.98	23.62
Saudi Arabia									
ARAMCO	32.55	0.14	8.98	-1.38	10.84	11.53	7,876.00 SAR	5.43	13.45
SABIC	91.20	1.11	0.00	-1.83	1.00	2.01	273.60 SAR	1.47	35.00
STC	44.00	0.00	3.53	-0.90	9.86	20.22	220.00 SAR	2.98	18.05
AL-RAJHI BANK	75.70	0.93	0.13	-1.56	2.99	0.66	302.80 SAR	3.05	17.48
NCB	36.90	-0.91	-1.11	-0.40	7.31	-2.57	165.24 SAR	1.32	15.90
United Arab Emirates									
ETISALAT.AD	23.48	0.34	0.17	-2.17	6.44	2.71	206.60 AED	5.10	21.10
FAB.AD	14.00	-0.71	6.38	-1.27	8.70	-18.13	154.66 AED	1.38	13.18
EMIRATES NBD	14.05	0.00	8.08	-0.35	6.84	8.08	88.74 AED	0.93	5.31
DB ISLAMIC BK	5.55	-0.72	4.52	-0.18	6.12	-2.63	40.18 AED	0.99	7.72
EMAAR PROPERT	6.02	0.33	0.84	1.52	7.50	2.73	53.21 AED	0.77	7.23
Qatar									
QNB	17.00	-0.76	9.68	11.11	5.79	-5.56	156.25 QAR	1.54	11.22
INDUSTRIES QAT	12.99	-0.76	-0.38	0.31	-0.08	1.41	78.20 QAR	2.15	8.92
QA ISLAMIC BK	18.75	0.48	5.51	4.81	5.46	1.02	44.09 QAR	1.66	11.46
MASRAF AL RAYA	2.70	0.22	0.19	3.13	-8.66	-14.88	24.98 QAR	1.07	20.52
MESAIEED PETRO	2.03	0.15	3.05	3.10	5.57	-4.70	25.34 QAR	1.56	15.99
OMAN									
BANK MUSCAT	0.270	0.00	-1.82	-1.10	-1.82	-1.82	2.03 OMR	0.93	8.33
OMANTEL	0.980	10.36	-3.45	-2.00	-10.91	6.52	0.73 OMR	1.16	7.69
BANK DHOFAR	0.160	1.27	0.00	3.23	0.00	-8.57	0.48 QAR	0.67	14.93
NAT BANK OF OMAN	0.275	-4.51	-3.17	0.00	2.61	-4.84	0.45 QAR	0.69	12.71
OMINVEST	0.394	-0.51	-5.29	-2.96	-20.56	-6.19	0.26 QAR	0.74	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
26-April 23	24.86%	16.22%	0.06%	1.38%	0.43%	4.66%	17.70%	14.24%	6.14%	5.07%
3-May1 23	24.86%	16.06%	0.06%	1.37%	0.44%	4.63%	17.67%	14.19%	6.09%	5.07%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.47 %The leading sector bottom performance indices today are Telecom -2.36 % Financial services -0.96 % Basic materials -0.61 % respectively

KSA

Saudi Armco has a positive performance today by + 0.14 %, SABIC has a positive performance today by + 1.11 %, STC has a flat performance today, Al Rajhi Bank has a positive performance today by + 0.93 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.34 %, FAB.AD has a negative performance today by -0.71 %



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