



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, February 9th 2023

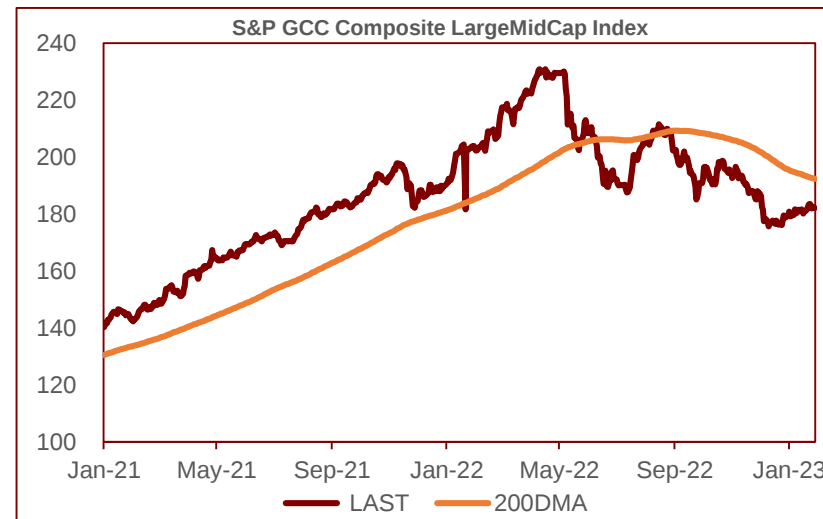




Market Watch

Thursday, February 9, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	10,412.16	-0.91	-2.71	-3.53	-0.63	-0.63	9,935 SAR	1.68	14.84
Qatar (QE Index)	10,424.20	-0.74	-2.56	-4.65	-2.40	-2.40	528 QAR	1.33	11.44
Dubai (DFMGI)	3,453.85	0.84	2.39	4.31	3.29	3.29	499 AED	1.20	18.50
Abu Dhabi (ADI)	10,023.05	0.03	1.54	2.03	-1.96	-1.96	1,435 AED	1.92	20.70
Bahrain (BAX)	1,936.98	0.07	0.82	0.45	2.20	2.20	20 BHD	1.57	15.66
MUSCAT SE INDEX	4,768.67	0.05	1.04	1.39	-1.83	-1.83	5 OMR	0.95	13.25
SP GCC Comp LMC	177.45	-0.83	-1.72	-2.24	-0.80	-0.80			
SP UAE PRICE INDEX	139.67	0.27	2.89	3.95	1.23	1.23			
Developed Markets									
MSCI World Index	2,783.91	-0.41	-2.01	0.20	7.22	7.22			
U.S. (S&P 500)	4,090.46	-0.88	-2.35	0.12	6.30	6.30			
U.K. (FTSE 100)	7,882.45	0.33	1.16	1.79	6.17	6.17			
Japan (Topix)	1,986.96	0.05	1.01	0.49	4.93	4.93			
Emerging Markets									
MSCI EM Index	1,013.67	0.39	-2.01	-0.68	7.12	7.12			
China (SSE Composite)	3,260.67	1.18	-0.47	0.45	5.86	5.86			
India (Sensex)	60,682.70	0.23	1.46	2.11	-0.06	-0.06			
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,339.91	-0.72	0.13	0.86	0.66	0.66	47.48 KWD	1.76	28.96
Kuwait Premier Index	8,201.47	-0.41	0.51	1.44	1.06	1.06	37.54 KWD	1.79	23.67
Kuwait Main Index	5,543.07	-1.99	-1.38	-1.43	-0.96	-0.96	9.94 KWD	1.61	49.04
NIC 50	9,158.04	-0.81	0.50	1.43	1.05	7.46	28.60 KWD	1.77	22.67
Kuwait Sector									
Banking	1,843.38	-0.38	0.94	1.66	2.76	2.76	31.04 KWD	1.34	24.67
Telecom	1,152.10	-5.49	-4.95	-3.80	-2.49	-2.49	3.53 KWD	1.98	11.79
Industrials	992.19	-0.36	0.15	1.26	-8.04	-8.04	3.48 KWD	0.78	18.29
Financial services	1,260.10	0.17	-0.28	0.50	0.23	0.23	3.59 KWD	0.69	16.46
Real estate	1,174.40	-0.62	-1.59	-1.21	-2.84	-2.84	2.55 KWD	0.55	22.23
Basic materials	856.50	-0.75	-1.15	-0.77	-1.00	-1.00	0.76 KWD	1.28	8.29
Health care	447.32	0.00	5.12	0.82	-3.15	-3.15	0.22 KWD	2.35	13.55
Consumer services	473.43	0.22	-0.43	-1.29	-1.36	-1.36	0.71 KWD	0.95	11.25
Insurance	1,574.13	0.00	0.53	1.32	1.50	1.50	0.65 KWD	0.83	9.50
Consumer Disc	1,411.18	0.53	-0.12	0.53	-5.09	-5.09	0.14 KWD	0.95	0.00
Energy	1,084.67	1.54	-1.50	-1.26	-4.73	-4.73	0.23 KWD	0.59	4.82
Technology	734.05	0.00	2.96	5.54	5.43	5.43	0.01 KWD	0.90	0.00
Utilities	476.32	-1.09	0.56	-0.55	-3.72	-3.72	0.20 KWD	1.68	14.88



What Move the GCC markets

Oil Prices

Russia will cut oil output by 500,000 barrels per day in March, Deputy Prime Minister Alexander Novak said on Friday, following Western bans on Moscow's crude and oil products implemented in the past few months. The Brent contract settled at \$84.50 a barrel.

Kuwait Market

The market closed down today by – 0.72% at 7,339.21 value traded 52.2 million KD, Premier market value traded reached 29.8 million KD down by - 0.41% at 8,201.47.

KSA Market

The market closed down today by - 0.91% at 10,412.16.

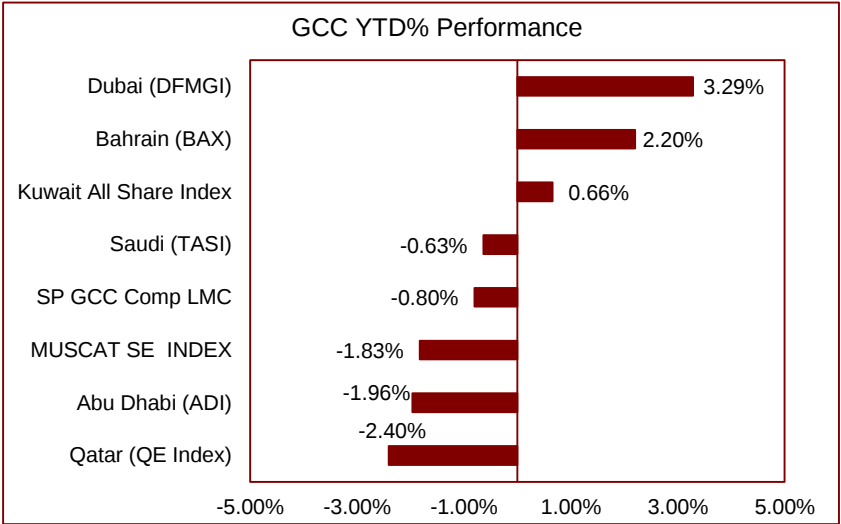


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	1.110	-1.07	-0.80	1.19	2.97	2.97	8.38 KWD	2.06	27.00
KFH	0.867	0.00	3.58	3.71	5.35	5.35	11.64 KWD	1.97	32.00
Zain	0.551	-0.90	-2.30	-0.54	-2.13	-2.13	2.38 KWD	1.98	11.79
BOUBYAN BANK	0.776	-1.15	-2.02	-1.02	-2.76	-2.76	2.90 KWD	3.06	34.00
Agility	0.610	-0.49	1.33	3.21	-15.28	-15.28	1.63 KWD	1.13	39.87
Saudi Arabia									
ARAMCO	32.40	-0.31	-0.61	-1.67	0.93	0.93	7,129.14 SAR	5.13	12.42
SABIC	92.30	-0.54	0.98	-0.43	3.24	3.24	276.94 SAR	1.51	35.00
STC	36.30	0.55	-2.16	-1.63	-0.82	-0.82	181.53 SAR	2.47	14.99
AL-RAJHI BANK	77.30	-1.78	-3.98	-5.73	2.79	2.79	309.25 SAR	3.09	20.18
NCB	48.40	-0.72	-0.82	2.33	-4.16	-4.16	216.77 SAR	1.29	11.90
United Arab Emirates									
ETISALAT.AD	26.88	0.07	4.19	4.59	17.59	17.59	206.60 AED	5.10	21.10
FAB.AD	14.40	0.14	4.20	5.88	-15.79	-15.79	158.65 AED	1.38	12.20
EMIRATES NBD	13.70	1.11	3.01	5.79	5.38	5.38	86.86 AED	0.93	6.92
DB ISLAMIC BK	5.65	0.00	1.44	1.80	-0.88	-0.88	41.13 AED	0.99	8.09
EMAAR PROPERT	5.72	1.06	3.62	2.88	-2.39	-2.39	50.82 AED	0.72	6.59
Qatar									
QNB	16.28	-2.81	-6.00	-9.56	-9.56	-9.56	150.37 QAR	1.43	11.33
INDUSTRIES QAT	14.02	0.07	1.59	-0.21	9.45	9.45	84.82 QAR	2.09	9.62
QA ISLAMIC BK	18.31	1.33	-4.64	-6.91	-1.35	-1.35	43.27 QAR	1.59	11.33
MASRAF AL RAYA	2.61	-1.69	-1.77	-4.32	-17.63	-17.63	24.29 QAR	1.01	16.57
MESAIEED PETRO	2.02	-2.08	-6.90	-5.86	-4.84	-4.84	25.43 QAR	1.48	13.42
OMAN									
BANK MUSCAT	0.287	-0.35	2.50	3.99	4.36	4.36	2.15 OMR	0.97	8.33
OMANTEL	0.968	9.01	-0.82	2.11	5.22	5.22	0.73 OMR	1.23	7.69
BANK DHOFAR	0.153	0.00	2.00	2.00	-12.57	-12.57	0.46 QAR	0.64	14.93
NAT BANK OF OMAN	0.270	-0.74	-1.82	-1.46	-6.57	-6.57	0.44 QAR	0.69	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
1-Feb 23	24.69%	16.82%	0.06%	1.35%	0.38%	4.47%	17.66%	15.20%	5.86%	5.19%
8-Feb 23	24.74%	16.79%	0.06%	1.35%	0.39%	4.46%	17.66%	15.22%	5.87%	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 -0.72 %The leading sector bottom performance indices today are Telecom -5.49 % Utilities -1.09 % Basic materials -0.75 % respectively

KSA
Saudi Armco has a negative performance today by -0.31 %, SABIC has a negative performance today by -0.54 %, STC has a positive performance today by + 0.55 %, Al Rajhi Bank has a negative performance today by -1.78 %

U.A.E
ETISALAT .AD has a positive performance today by + 0.07 %, FAB.AD has a positive performance today by + 0.14 %



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