



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, March 9th 2023



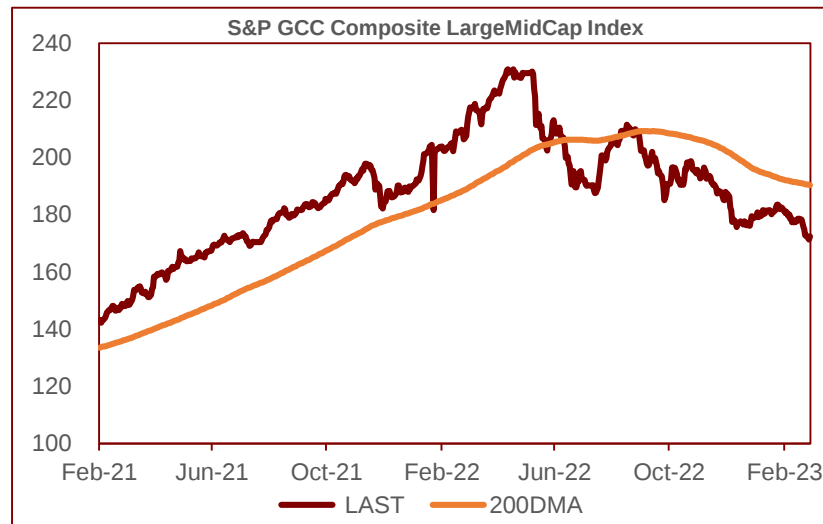


Market Watch

Thursday, March 9th 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	10,463.18	0.51	1.80	3.57	-0.15	-0.15	10,032 SAR	1.67	16.46
Qatar (QE Index)	10,736.60	-0.15	1.08	1.57	0.52	0.52	545 QAR	1.36	11.75
Dubai (DFMGI)	3,385.51	-0.51	-0.77	-0.82	2.20	2.20	488 AED	1.18	18.98
Abu Dhabi (ADI)	9,827.79	-0.84	-0.08	0.16	-3.44	-3.44	1,435 AED	1.90	23.39
Bahrain (BAX)	1,911.68	0.02	-0.94	-1.04	0.87	0.87	20 BHD	1.73	18.00
MUSCAT SE INDEX	4,849.54	-0.11	0.59	2.03	-0.16	-0.16	5 OMR	0.97	13.25
SP GCC Comp LMC	176.54	0.04	1.13	2.43	-1.21	-1.21			
SP UAE PRICE INDEX	134.87	-0.72	-0.65	-0.63	-1.53	-1.53			
Developed Markets									
MSCI World Index	2,657.41	-1.25	-1.05	-0.86	3.40	3.40			
U.S. (S&P 500)	3,861.59	-1.85	-1.58	-1.31	2.05	2.05			
U.K. (FTSE 100)	7,748.35	-0.63	-0.81	0.05	5.75	5.75			
Japan (Topix)	2,031.58	0.97	3.84	3.90	9.48	9.48			
Emerging Markets									
MSCI EM Index	955.28	-0.99	-1.19	0.45	1.26	1.26			
China (SSE Composite)	3,230.08	-0.22	-1.04	-0.11	6.05	6.05			
India (Sensex)	59,135.13	-0.90	1.52	1.43	-1.70	-1.70			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,283.41	-0.28	-0.05	0.54	-0.12	-0.12	47.12 KWD	1.76	26.93
Kuwait Premier Index	8,138.14	-0.29	0.18	0.85	0.28	0.28	37.22 KWD	1.77	23.22
Kuwait Main Index	5,501.00	-0.26	-1.08	-0.86	-1.71	-1.71	9.89 KWD	1.70	40.95
NIC 50	9,116.33	-0.33	0.17	0.84	0.27	0.36	28.60 KWD	1.75	22.22
Kuwait Sector									
Banking	1,831.76	-0.37	0.42	1.21	2.11	2.11	30.85 KWD	1.29	24.22
Telecom	1,170.03	0.03	-0.47	-0.12	-0.97	-0.97	3.59 KWD	1.99	11.81
Industrials	978.60	-0.45	-0.93	-1.19	-9.29	-9.29	3.44 KWD	0.77	18.24
Financial services	1,222.33	-0.49	-2.03	-1.11	-2.78	-2.78	3.48 KWD	0.71	17.32
Real estate	1,122.81	0.24	-1.21	-1.68	-7.11	-7.11	2.44 KWD	0.54	21.41
Basic materials	844.66	0.00	-0.52	0.07	-2.36	-2.36	0.76 KWD	1.28	8.16
Health care	462.30	0.59	0.49	0.49	0.10	0.10	0.23 KWD	2.48	13.39
Consumer services	478.88	2.12	-0.36	0.06	-0.22	-0.22	0.74 KWD	0.89	12.14
Insurance	1,619.39	-0.62	-0.76	-0.50	4.42	4.42	0.67 KWD	0.80	10.12
Consumer Disc	1,471.90	0.91	0.97	1.06	-1.00	-1.00	0.15 KWD	0.95	0.00
Energy	1,028.82	-0.33	1.42	1.08	-9.64	-9.64	0.21 KWD	0.54	4.41
Technology	676.57	-4.62	4.73	-0.11	-2.82	-2.82	0.01 KWD	0.83	0.00
Utilities	478.95	0.00	0.00	0.00	-3.19	-3.19	0.20 KWD	1.71	13.84



What Move the GCC markets

Oil Prices

Oil prices were near flat on Thursday, as a larger-than-expected draw in U.S. crude stocks contended with worries that more aggressive U.S. interest rate rises would strain economic growth and therefore dent oil consumption. Brent crude futures were unchanged at \$82.66 per barrel.

Kuwait Market

The market closed down today by – 0.28% at 7,283.41 value traded 28.1 million KD, Premier market value traded reached 24.4 million KD down by – 0.29% at 8,138.14.

KSA Market

The market closed up today by + 0.51% at 10,463.18.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



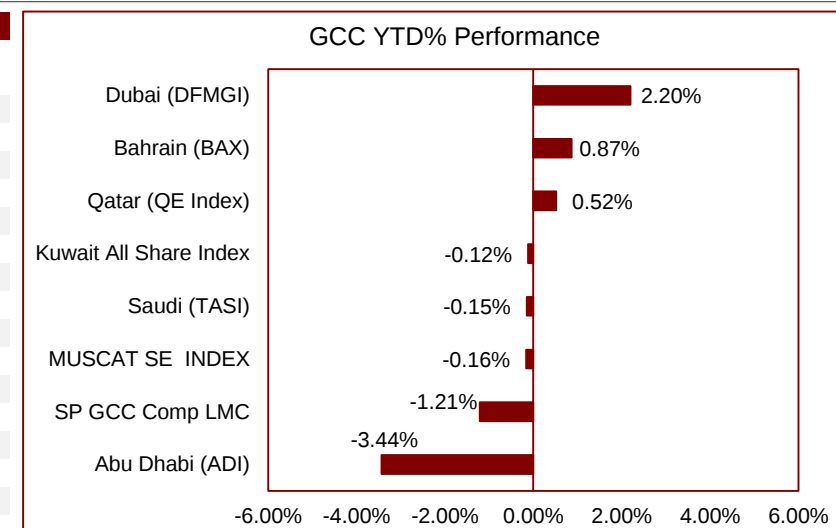
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	1.110	-0.45	1.37	3.74	2.97	2.97	8.38 KWD	2.06	27.00
KFH	0.870	-0.23	1.05	1.52	5.71	5.71	11.68 KWD	1.98	32.00
Zain	0.552	0.18	-0.72	-1.25	-1.95	-1.95	2.39 KWD	1.99	11.81
BOUBYAN BANK	0.738	-1.34	-2.89	-3.53	-7.52	-7.52	2.76 KWD	2.91	34.00
Agility	0.598	0.34	-0.50	-0.83	-16.94	-16.94	1.60 KWD	1.11	39.08
Saudi Arabia									
ARAMCO	32.80	1.23	3.31	3.14	2.18	2.18	7,216.00 SAR	5.20	12.38
SABIC	90.40	-0.44	0.00	2.15	1.12	1.12	271.20 SAR	1.46	35.00
STC	38.20	0.79	6.26	8.68	4.37	4.37	191.00 SAR	2.59	15.54
AL-RAJHI BANK	75.00	1.21	1.76	6.69	-0.27	-0.27	300.00 SAR	2.99	19.00
NCB	46.45	0.32	-0.32	-1.69	-8.02	-8.02	208.00 SAR	1.24	11.30
United Arab Emirates									
ETISALAT.AD	25.40	0.32	-0.78	-0.39	11.11	11.11	206.60 AED	5.10	21.10
FAB.AD	14.10	-3.29	-0.14	0.14	-17.54	-17.54	155.76 AED	1.35	11.94
EMIRATES NBD	12.80	-2.29	-5.54	-5.88	-1.54	-1.54	81.48 AED	0.87	6.47
DB ISLAMIC BK	5.70	-1.04	-0.52	-0.70	0.00	0.00	41.27 AED	1.00	8.16
EMAAR PROPERT	5.50	-1.43	-1.43	-1.79	-6.14	-6.14	48.52 AED	0.69	6.59
Qatar									
QNB	16.53	-1.43	1.97	-1.90	-8.17	-8.17	152.68 QAR	1.45	11.50
INDUSTRIES QAT	14.33	0.21	1.63	2.95	11.87	11.87	86.70 QAR	2.06	9.84
QA ISLAMIC BK	19.39	0.88	4.25	4.25	4.47	4.47	45.82 QAR	1.68	12.00
MASRAF AL RAYA	2.79	0.98	2.27	3.41	-11.95	-11.95	25.97 QAR	1.08	17.72
MESAIEED PETRO	2.22	-0.05	4.23	5.66	4.37	4.37	27.89 QAR	1.60	15.78
OMAN									
BANK MUSCAT	0.288	-1.37	-0.69	-1.37	4.73	4.73	2.16 OMR	0.97	8.33
OMANTEL	1.010	13.74	3.91	5.21	9.78	9.78	0.76 OMR	1.28	7.69
BANK DHOFAR	0.155	-0.64	1.31	1.97	-11.43	-11.43	0.46 QAR	0.65	14.93
NAT BANK OF OMAN	0.276	0.00	0.73	3.76	-4.50	-4.50	0.45 QAR	0.70	12.71
OMINVEST	0.480	0.00	0.84	5.26	14.29	14.29	0.32 QAR	0.95	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
1-March 23	24.76%	16.62%	0.06%	1.33%	0.42%	4.46%	17.72%	15.18%	5.84%	5.17%
8-March 23	24.78%	16.61%	0.06%	1.36%	0.42%	4.69%	17.70%	15.06%	5.84%	5.25%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.28 %The leading sector bottom performance indices today are Technology -4.62 % Insurance -0.62 % Financial services -0.49 % respectively

KSA

Saudi Armco has a positive performance today by + 1.23 %, SABIC have negative performance today by -0.44 %, STC has a positive performance today by + 0.79 %, Al Rajhi Bank has a positive performance today by + 1.21 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.32 %, FAB.AD have negative performance today by -3.29 %



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