



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, May 9th 2023



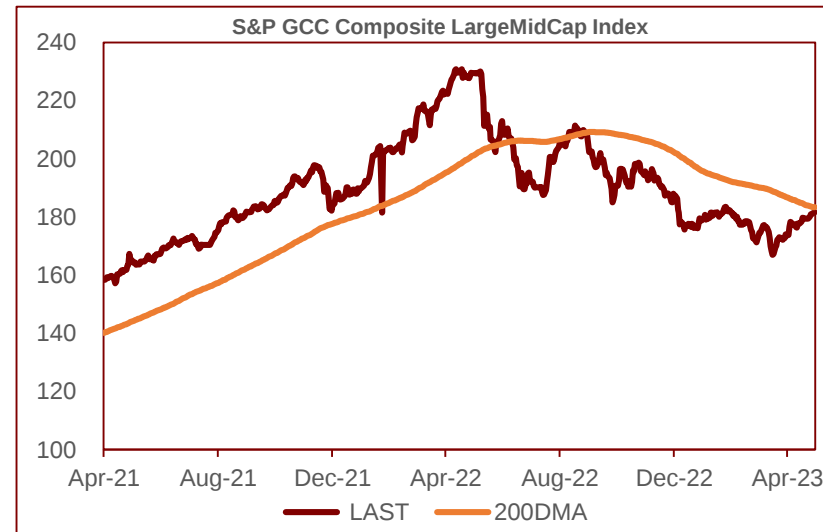


Market Watch

Tuesday, May 9, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	11,305.28	0.43	3.11	-0.02	6.75	7.89	10,372 SAR	1.89	18.13
Qatar (QE Index)	10,747.00	0.29	6.51	5.56	5.23	0.62	573 QAR	1.42	13.05
Dubai (DFMGI)	3,571.09	-0.33	2.40	0.74	4.82	7.04	511 AED	1.25	23.60
Abu Dhabi (ADI)	9,689.36	-0.02	1.37	-1.02	2.75	-5.11	1,435 AED	1.73	21.09
Bahrain (BAX)	1,923.18	0.49	2.21	0.99	1.94	1.47	20 BHD	1.62	18.00
MUSCAT SE INDEX	4,672.59	-0.17	-2.88	-0.96	-3.92	-3.81	5 OMR	1.01	13.25
SP GCC Comp LMC	181.01	0.00	1.87	-0.34	4.23	1.25			
SP UAE PRICE INDEX	135.51	-0.19	2.33	-1.44	5.89	-1.45			
Developed Markets									
MSCI World Index	2,815.29	-0.43	-0.49	-0.73	0.85	8.17			
U.S. (S&P 500)	4,119.17	-0.46	-0.65	-1.21	0.24	7.28			
U.K. (FTSE 100)	7,764.09	-0.18	-1.01	-1.35	1.73	4.19			
Japan (Topix)	2,097.55	1.27	4.46	1.95	4.69	10.88			
Emerging Markets									
MSCI EM Index	982.24	-0.73	-1.48	0.53	-0.81	2.70			
China (SSE Composite)	3,357.67	-1.10	1.18	1.04	2.59	8.69			
India (Sensex)	61,761.33	0.00	2.20	1.06	4.70	1.51			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	6,947.12	-0.77	-0.61	-2.73	-1.47	-4.73	45.01 KWD	1.68	20.26
Kuwait Premier Index	7,664.39	-0.79	-1.21	-3.14	-2.01	-5.56	35.01 KWD	1.65	20.13
Kuwait Main Index	5,552.19	-0.67	2.06	-0.97	0.93	-0.80	10.00 KWD	1.76	20.76
NIC 50	8,864.77	0.00	-1.22	-3.15	-2.02	-2.41	28.60 KWD	1.63	19.13
Kuwait Sector									
Banking	1,706.80	-1.06	-1.07	-2.82	-2.63	-4.86	28.76 KWD	1.24	21.13
Telecom	1,136.41	-0.42	0.04	-3.26	0.37	-3.81	3.49 KWD	1.43	9.23
Industrials	980.96	-0.24	0.35	-2.44	-0.61	-9.08	3.46 KWD	0.81	18.45
Financial services	1,193.56	-0.52	-1.48	-3.00	-0.20	-5.07	3.47 KWD	0.71	20.45
Real estate	1,091.59	-0.17	-2.35	-4.61	1.06	-9.69	2.37 KWD	0.52	13.58
Basic materials	862.62	0.36	3.04	-3.29	0.64	-0.29	0.77 KWD	1.53	7.88
Health care	454.28	-0.60	-1.77	-0.60	-0.27	-1.64	0.23 KWD	1.03	10.16
Consumer services	473.06	2.92	5.42	3.53	6.24	-1.44	0.74 KWD	0.85	13.33
Insurance	2,123.86	0.59	12.00	0.48	11.20	36.95	0.88 KWD	0.77	9.87
Consumer Disc	1,470.43	0.28	2.92	0.90	0.58	-1.10	0.14 KWD	0.93	0.00
Energy	965.92	-1.23	-3.23	-1.32	-3.20	-15.16	0.20 KWD	0.59	4.65
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 prices fell Tuesday, relinquishing some of the strong gains of the previous two sessions with the market cautious ahead of U.S. inflation figures for April, which will be key to the Federal Reserve's next interest rate decision. The Brent crude price was down 61 cents, or 0.8%, at \$76.40.

Kuwait Market

The market closed down today by -0.77% at 6,947.12 value traded 43.7 million KD, Premier market value traded reached 40.3 million KD down by - 0.79% at 7,664.39.

KSA Market

The market closed up today by 0.43% at 11,305.28

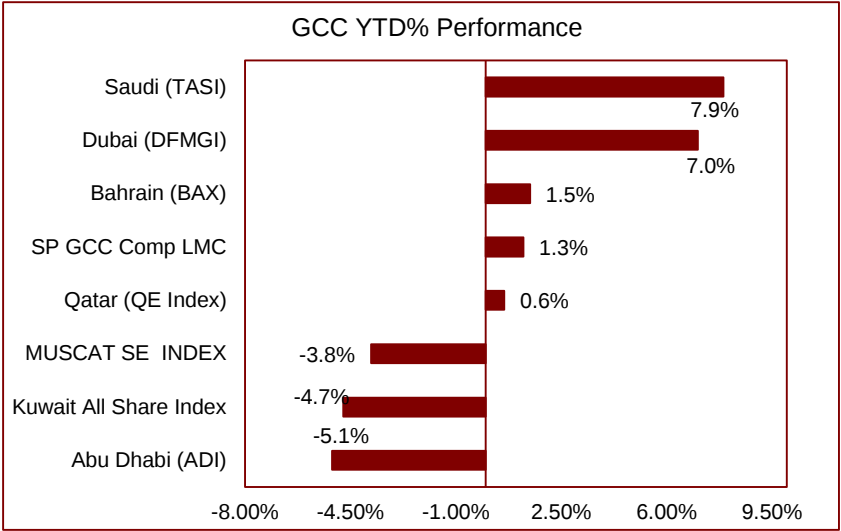


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.960	-1.13	-0.31	-4.38	-4.55	-6.49	7.61 KWD	1.93	27.00
KFH	0.726	-1.22	-1.89	-2.02	-3.32	-2.96	10.72 KWD	1.85	32.00
Zain	0.540	-0.55	-1.82	-4.09	0.00	-4.09	2.34 KWD	1.90	11.92
BOUBYAN BANK	0.624	-1.42	-0.95	-5.60	2.87	-17.11	2.47 KWD	2.79	34.00
Agility	0.614	0.16	2.68	-0.32	-1.13	-14.72	1.64 KWD	0.98	23.65
Saudi Arabia									
ARAMCO	33.60	3.24	12.51	1.82	14.43	15.14	7,392.00 SAR	5.61	15.41
SABIC	91.60	0.44	0.44	-1.40	1.44	2.46	274.80 SAR	1.48	35.00
STC	43.80	-0.45	3.06	-1.35	9.36	19.67	219.00 SAR	2.97	18.05
AL-RAJHI BANK	75.50	-0.26	-0.13	-1.82	2.72	0.40	302.00 SAR	3.04	17.64
NCB	36.60	-0.81	-1.91	-1.21	6.43	-3.37	163.89 SAR	1.30	11.82
United Arab Emirates									
ETISALAT.AD	23.46	-0.09	0.09	-2.25	6.35	2.62	206.60 AED	5.10	21.10
FAB.AD	14.06	0.43	6.84	-0.85	9.16	-17.78	155.33 AED	1.38	13.24
EMIRATES NBD	14.10	0.36	8.46	0.00	7.22	8.46	89.06 AED	0.93	5.33
DB ISLAMIC BK	5.52	-0.54	3.95	-0.72	5.54	-3.16	39.97 AED	0.99	7.68
EMAAR PROPERT	6.01	-0.17	0.67	1.35	7.32	2.56	53.12 AED	0.77	7.22
Qatar									
QNB	16.88	-0.71	8.90	10.33	5.04	-6.22	156.52 QAR	1.53	11.14
INDUSTRIES QAT	13.00	0.08	-0.31	0.39	0.00	1.48	78.96 QAR	2.15	10.81
QA ISLAMIC BK	18.77	0.11	5.63	4.92	5.57	1.13	44.53 QAR	1.66	11.47
MASRAF AL RAYA	2.79	3.37	3.56	6.61	-5.58	-12.02	26.05 QAR	1.10	21.22
MESAIEED PETRO	2.05	1.13	4.22	4.27	6.77	-3.62	25.86 QAR	1.58	16.17
OMAN									
BANK MUSCAT	0.267	-1.11	-2.91	-2.20	-2.91	-2.91	2.00 OMR	0.92	8.33
OMANTEL	0.980	10.36	-3.45	-2.00	-10.91	6.52	0.73 OMR	1.16	7.69
BANK DHOFAR	0.162	1.25	1.25	4.52	1.25	-7.43	0.49 QAR	0.68	14.93
NAT BANK OF OMAN	0.275	0.00	-3.17	0.00	2.61	-4.84	0.45 QAR	0.69	12.71
OMINVEST	0.396	0.51	-4.81	-2.46	-20.16	-5.71	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-May 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, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is down today by -0.77 %The leading sector bottom performance indices today are Energy -1.23 % Banking -1.06 % Health care -0.6 % respectively

KSA
Saudi Armco has a positive performance today by + 3.24 %, SABIC has a positive performance today by + 0.44 %, STC has a negative performance today by -0.45 %, Al Rajhi Bank has a negative performance today by -0.26 %

U.A.E
ETISALAT .AD has a negative performance today by -0.09 %, FAB.AD has a positive performance today by + 0.43 %



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