



شركة الاستثمارات الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

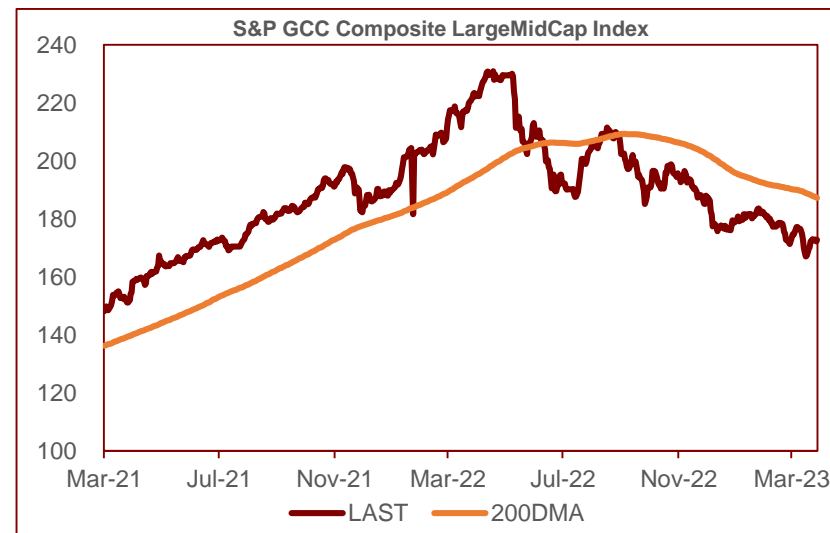
Sunday, April 9th 2023





Market Watch Sunday, April 9th 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	10,965.78	0.55	0.55	3.55	3.55	4.65	10,171 SAR	1.83	17.46
Qatar (QE Index)	10,250.99	-0.88	-0.88	0.38	0.38	-4.03	544 QAR	1.28	11.30
Dubai (DFMGI)	3,410.51	-0.12	-0.12	0.11	0.11	2.23	493 AED	1.18	22.21
Abu Dhabi (ADI)	9,461.69	-0.10	-0.10	0.33	0.33	-7.34	1,435 AED	1.74	20.82
Bahrain (BAX)	1,886.29	0.02	0.02	-0.02	-0.02	-0.47	19 BHD	1.72	18.00
MUSCAT SE INDEX	4,765.30	0.19	0.19	-2.01	-2.01	-1.90	5 OMR	1.04	13.25
SP GCC Comp LMC	177.49	0.08	0.08	2.20	2.20	-0.72			
SP UAE PRICE INDEX	129.46	0.02	0.02	1.16	1.16	-5.85			
Developed Markets									
MSCI World Index	2,790.38	0.01	0.01	-0.04	-0.04	7.21			
U.S. (S&P 500)	4,105.02	0.00	0.00	-0.10	-0.10	6.92			
U.K. (FTSE 100)	7,741.56	0.00	0.00	1.44	1.44	3.89			
Japan (Topix)	1,965.44	0.21	0.21	-1.90	-1.90	3.90			
Emerging Markets									
MSCI EM Index	987.07	0.27	0.27	-0.32	-0.32	3.21			
China (SSE Composite)	3,327.65	0.45	0.45	1.67	1.67	7.72			
India (Sensex)	59,832.97	0.00	0.00	1.43	1.43	-1.66			
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	6,902.98	-0.95	-0.95	-2.10	-2.10	-5.34	44.67 KWD	1.62	21.28
Kuwait Premier Index	7,641.52	-1.08	-1.08	-2.30	-2.30	-5.84	34.89 KWD	1.61	21.29
Kuwait Main Index	5,436.16	-0.36	-0.36	-1.17	-1.17	-2.87	9.78 KWD	1.66	21.27
NIC 50	8,642.36	-1.36	-1.09	-2.31	-2.31	-4.86	28.60 KWD	1.59	20.29
Kuwait Sector									
Banking	1,710.19	-1.06	-1.06	-2.43	-2.43	-4.67	28.79 KWD	1.26	22.29
Telecom	1,109.34	-0.86	-0.86	-2.02	-2.02	-6.10	3.40 KWD	1.90	11.90
Industrials	946.74	-1.28	-1.28	-4.07	-4.07	-12.25	3.32 KWD	0.77	17.28
Financial services	1,189.86	-0.84	-0.84	-0.51	-0.51	-5.36	3.46 KWD	0.66	19.89
Real estate	1,090.31	-0.28	-0.28	0.94	0.94	-9.80	2.37 KWD	0.54	12.74
Basic materials	842.96	-0.22	-0.22	-1.66	-1.66	-2.56	0.76 KWD	1.51	7.80
Health care	462.45	0.00	0.00	1.53	1.53	0.13	0.23 KWD	2.48	10.54
Consumer services	445.31	0.00	0.00	0.01	0.01	-7.22	0.72 KWD	0.82	12.40
Insurance	1,901.59	-0.77	-0.77	-0.44	-0.44	22.62	0.78 KWD	0.80	10.16
Consumer Disc	1,440.09	0.11	0.11	-1.50	-1.50	-3.14	0.14 KWD	0.90	0.00
Energy	998.14	0.00	0.00	0.03	0.03	-12.33	0.21 KWD	0.59	4.45
Technology	632.92	0.00	0.00	-0.46	-0.46	-9.09	0.01 KWD	0.78	0.00
Utilities	452.63	-1.15	-1.15	-2.83	-2.83	-8.51	0.19 KWD	1.62	13.08



What Move the GCC markets

Oil Prices

Oil prices were little changed on Thursday but posted a third weekly gain as markets weighed further production cuts targeted by OPEC+ and falling U.S. oil inventories against fears about the global economic outlook. Brent crude settled down 13 cents, or 0.2%, at \$84.86 a barrel.

Kuwait Market

The market closed down today by - 0.95% at 6,902.98 value traded 21.8 million KD, Premier market value traded reached 19.5 million KD down by - 1.08% at 7,641.52.

KSA Market

The market closed up today by + 0.55% at 10,965.78.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



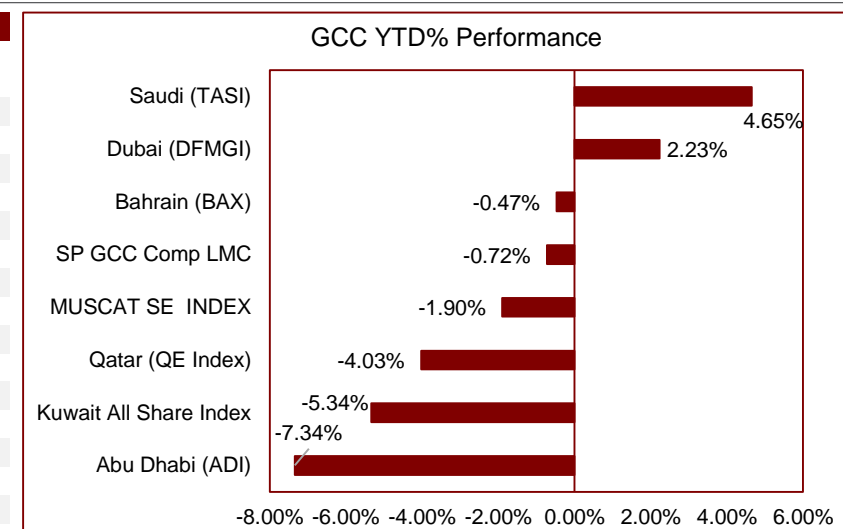
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch									
Kuwait									
NBK	0.963	-1.23	-1.23	-4.25	-4.25	-6.20	7.64 KWD	1.88	27.00
KFH	0.725	-1.89	-1.89	-3.45	-3.45	-3.10	10.70 KWD	1.81	32.00
Zain	0.539	-0.55	-0.55	-0.19	-0.19	-4.26	2.33 KWD	1.90	11.90
BOUBYAN BANK	0.650	-0.15	-0.15	1.09	1.09	-18.55	2.43 KWD	2.56	34.00
Agility	0.566	-2.08	-2.08	-8.86	-8.86	-21.39	1.51 KWD	0.90	21.81
Saudi Arabia									
ARAMCO	32.70	0.15	0.15	1.24	1.24	1.87	7,194.00 SAR	4.96	12.29
SABIC	92.80	0.22	0.22	2.77	2.77	3.80	278.40 SAR	1.50	35.00
STC	41.25	0.24	0.24	3.00	3.00	12.70	206.25 SAR	2.80	16.88
AL-RAJHI BANK	76.70	1.05	1.05	4.35	4.35	1.99	306.80 SAR	3.06	19.46
NCB	49.95	0.60	0.60	8.94	8.94	-1.09	223.68 SAR	1.34	12.12
United Arab Emirates									
ETISALAT.AD	22.98	1.14	1.14	4.17	4.17	0.52	206.60 AED	5.10	21.10
FAB.AD	13.02	-0.15	-0.15	1.09	1.09	-23.86	143.84 AED	1.25	11.03
EMIRATES NBD	13.30	0.00	0.00	1.14	1.14	2.31	84.01 AED	0.90	6.72
DB ISLAMIC BK	5.27	0.19	0.19	0.76	0.76	-7.54	38.16 AED	0.92	7.54
EMAAR PROPERT	5.66	0.18	0.18	1.07	1.07	-3.41	50.03 AED	0.73	6.80
Qatar									
QNB	16.10	-0.62	-0.62	0.19	0.19	-10.56	149.44 QAR	1.42	11.20
INDUSTRIES QAT	13.06	-0.99	-0.99	0.46	0.46	1.95	79.40 QAR	1.88	8.96
QA ISLAMIC BK	18.42	-0.43	-0.43	3.60	3.60	-0.75	43.53 QAR	1.60	11.40
MASRAF AL RAYA	2.72	-1.55	-1.55	-7.85	-7.85	-14.13	25.45 QAR	1.05	17.28
MESAIEED PETRO	1.97	0.15	0.15	2.55	2.55	-7.43	24.86 QAR	1.42	13.99
OMAN									
BANK MUSCAT	0.275	0.73	0.73	0.00	0.00	0.00	2.06 OMR	0.92	8.33
OMANTEL	1.040	17.12	-1.42	-5.45	-5.45	13.04	0.78 OMR	1.23	7.69
BANK DHOFAR	0.155	0.00	0.00	-3.12	-3.12	-11.43	0.46 QAR	0.65	14.93
NAT BANK OF OMAN	0.260	0.00	0.00	-2.99	-2.99	-10.03	0.42 QAR	0.66	12.71
OMINVEST	0.430	4.88	4.88	-13.31	-13.31	2.38	0.29 QAR	0.81	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
29-March 23	24.80%	16.29%	0.06%	1.37%	0.41%	4.59%	17.70%	14.39%	5.93%	5.11%
5-April 23	24.85%	16.26%	0.06%	1.38%	0.41%	4.65%	17.70%	14.34%	6.07%	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 -0.95 % The leading sector bottom performance indices today are Industrials -1.28 % Utilities -1.15 % Banking -1.06 % respectively

KSA

Saudi Armco has a positive performance today by + 0.15 %, SABIC have positive performance today by + 0.22 %, STC has a positive performance today by + 0.24 %, Al Rajhi Bank has a positive performance today by + 1.05 %

U.A.E

ETISALAT .AD has a positive performance today by + 1.14 %, FAB.AD have negative performance today by -0.15 %



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