



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, July 26th 2023



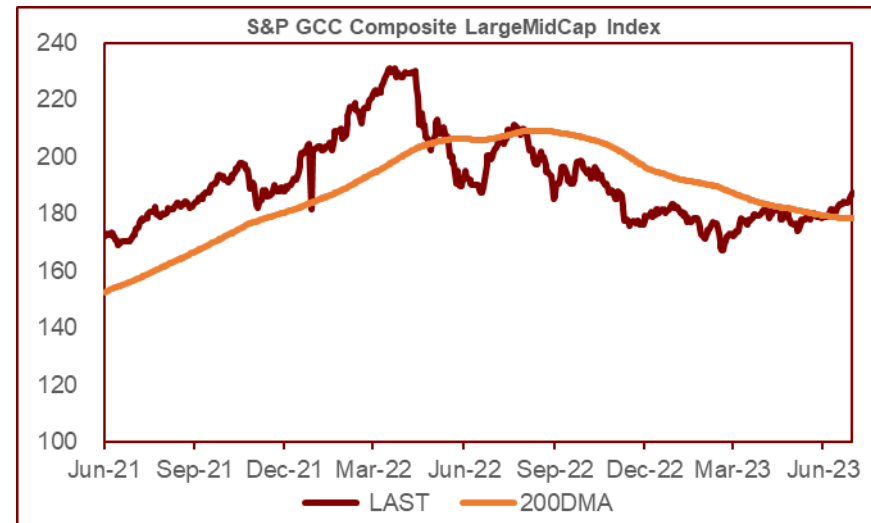


Market Watch

Wednesday, July 26, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	11,906.13	0.20	1.17	3.90	3.90	13.62	11,081 SAR	2.02	18.69
Qatar (QE Index)	10,764.97	2.17	4.45	6.85	6.85	0.79	567 QAR	1.44	11.92
Dubai (DFMGI)	4,039.48	0.61	0.44	6.53	6.53	21.08	578 AED	1.60	19.98
Abu Dhabi (ADI)	9,765.54	0.39	0.70	2.25	2.25	-4.36	1,435 AED	1.85	22.02
Bahrain (BAX)	1,984.58	-0.16	-0.07	1.36	1.36	4.71	9 BHD	6.29	18.00
MUSCAT SE INDEX	4,767.47	-0.32	-0.88	-0.02	-0.02	-1.85	5 OMR	0.99	13.25
SP GCC Comp LMC	187.50	0.45	1.73	4.74	4.74	4.88			
SP UAE PRICE INDEX	140.53	0.23	0.79	4.60	4.60	2.20			
Developed Markets									
MSCI World Index	3,044.70	-0.02	0.07	2.63	2.63	16.98			
U.S. (S&P 500)	4,566.75	-0.02	0.26	2.61	2.61	18.94			
U.K. (FTSE 100)	7,676.89	-0.19	2.99	1.93	1.93	3.02			
Japan (Topix)	2,283.09	-0.10	1.37	-0.24	-0.24	20.69			
Emerging Markets									
MSCI EM Index	1,031.88	-0.04	0.95	4.29	4.29	7.89			
China (SSE Composite)	3,223.03	-0.26	0.79	0.65	0.65	4.33			
India (Sensex)	66,707.20	0.53	-0.13	3.07	3.07	9.64			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,278.14	0.03	-0.57	3.53	3.53	-0.19	46.89 KWD	1.76	17.72
Kuwait Premier Index	8,104.66	0.01	-0.69	3.78	3.78	-0.14	36.67 KWD	1.70	17.38
Kuwait Main Index	5,601.70	0.15	-0.08	2.53	2.53	0.09	10.21 KWD	1.96	18.95
NIC 50	9,294.93	0.01	-0.69	3.76	3.76	-0.14	28.60 KWD	1.68	16.38
Kuwait Sector									
Banking	1,775.99	-0.01	-0.22	4.12	4.12	-1.00	29.76 KWD	1.24	18.38
Telecom	1,138.55	1.22	-0.95	1.89	1.89	-3.63	3.49 KWD	1.40	9.11
Industrials	1,019.93	0.10	-1.55	1.68	1.68	-5.46	3.59 KWD	0.80	20.51
Financial services	1,284.43	-0.62	-1.98	4.68	4.68	2.16	3.71 KWD	0.78	18.93
Real estate	1,234.69	0.68	-0.29	2.25	2.25	2.15	2.67 KWD	0.62	22.74
Basic materials	879.25	-0.57	-2.69	-3.10	-3.10	1.63	0.78 KWD	1.40	8.12
Health care	461.54	0.00	0.00	2.69	2.69	-0.07	0.23 KWD	0.99	6.96
Consumer services	612.40	-0.83	-0.43	-0.44	-0.44	27.60	0.83 KWD	0.88	14.24
Insurance	2,115.78	-0.07	0.47	0.27	0.27	36.43	0.87 KWD	0.80	10.19
Consumer Disc	1,696.52	-1.06	0.39	8.75	8.75	14.10	0.19 KWD	1.12	0.00
Energy	985.09	-1.59	-3.55	-3.36	-3.36	-13.48	0.21 KWD	0.74	4.45
Technology	583.45	-4.98	-4.98	-13.67	-13.67	-16.20	0.01 KWD	0.72	0.00
Utilities	528.95	0.50	0.50	0.50	0.50	6.91	0.22 KWD	2.02	16.46



What Move the GCC markets

Oil Prices

Oil prices rose on Thursday as investors focused on expectations of tighter supplies from top oil producers, helping reverse earlier losses that were driven by worries that the hike in interest rates by the U.S. will hurt demand. The promise of economic stimulus in China, the world's second-biggest oil consumer, also lent support to the market. Brent crude futures were up 36 cents, or 0.4%, at \$83.28 barrel.

Kuwait Market

The market closed up by 0.03% at 7,278.14 value traded 40.8 million KD, Premier market value traded reached 34.2 million KD up 0.01% at 8,104.66

KSA Market

The market closed up today by 0.20% at 11,906.13

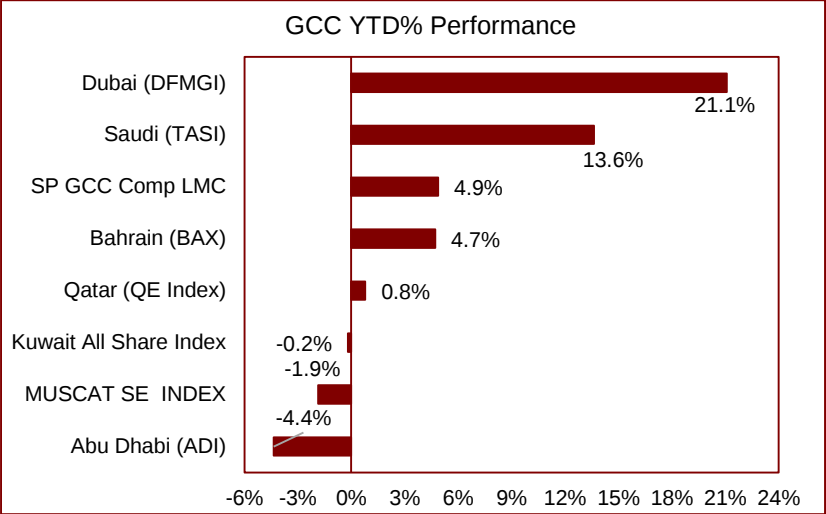


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.970	-0.10	-1.22	3.74	3.74	-5.52	7.69 KWD	1.87	27.00
KFH	0.787	-0.13	0.51	5.64	5.64	5.19	11.62 KWD	2.01	32.00
Zain	0.530	1.92	-0.38	2.32	2.32	-5.86	2.29 KWD	1.79	11.30
BOUBYAN BANK	0.641	0.63	-1.54	0.16	0.16	-14.85	2.54 KWD	2.63	34.00
Agility	0.642	-0.16	-2.13	3.05	3.05	-10.83	1.72 KWD	0.90	23.14
Saudi Arabia									
ARAMCO	32.40	0.15	0.31	0.47	0.47	11.03	7,842.89 SAR	5.25	13.93
SABIC	86.00	0.00	-0.12	-2.49	-2.49	-3.80	258.07 SAR	1.38	35.00
STC	45.05	-1.31	-1.21	3.56	3.56	23.09	225.31 SAR	3.01	18.62
AL-RAJHI BANK	76.10	1.47	7.64	4.25	4.25	1.20	304.48 SAR	3.07	17.83
NCB	39.90	-0.25	-0.99	8.42	8.42	5.87	239.46 SAR	1.39	12.66
United Arab Emirates									
ETISALAT.AD	22.38	-0.36	-0.62	-0.09	-0.09	-2.10	206.60 AED	5.10	21.10
FAB.AD	14.52	1.68	5.68	6.45	6.45	-15.09	160.41 AED	1.38	12.30
EMIRATES NBD	16.35	0.62	-0.30	10.10	10.10	25.77	103.28 AED	1.08	6.18
DB ISLAMIC BK	5.71	-1.55	0.88	4.39	4.39	0.18	41.34 AED	1.02	7.60
EMAAR PROPERT	6.72	0.30	-0.74	4.84	4.84	14.68	59.40 AED	0.83	7.08
Qatar									
QNB	16.30	1.88	3.89	5.71	5.71	-9.44	150.52 QAR	1.46	10.92
INDUSTRIES QAT	12.75	3.32	6.69	13.54	13.54	-0.47	77.12 QAR	2.11	10.60
QA ISLAMIC BK	20.40	5.64	10.87	15.19	15.19	9.91	48.19 QAR	1.75	12.18
MASRAF AL RAYA	2.55	1.39	2.99	-0.66	-0.66	-19.71	23.67 QAR	0.99	22.83
MESAIEED PETRO	1.94	0.05	0.94	2.11	2.11	-8.79	24.37 QAR	1.50	15.30
OMAN									
BANK MUSCAT	0.279	-0.36	-1.06	1.09	1.09	1.45	2.09 OMR	0.94	8.33
OMANTEL	0.998	12.39	-0.20	0.60	0.60	8.48	0.75 OMR	1.23	7.69
BANK DHOFAR	0.174	-0.57	-0.57	0.58	0.58	-0.57	0.52 QAR	0.73	14.93
NAT BANK OF OMAN	0.290	-1.69	-3.33	3.57	3.57	0.35	0.47 QAR	0.73	12.71
OMINVEST	0.380	0.00	0.26	0.53	0.53	-9.52	0.25 QAR	0.71	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
12-July 23	24.34%	15.45%	0.066%	1.72%	0.24%	5.23%	17.58%	13.82%	6.21%	4.57%
19-July 23	24.32%	15.18%	0.06%	1.72%	0.24%	5.09%	17.58%	13.77%	6.17%	4.57%

End of Report
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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is up today by + 0.03 %. The leading sector best performance indices today are Telecom 1.22 % Real estate 0.68 % Utilities 0.5 % respectively.

KSA
Saudi Armco has a positive performance today by + 0.15 %, SABIC flat performance today 0 %. STC have negative performance today by -1.31 %, Al Rajhi Bank has a positive performance today by + 1.47 %.

U.A.E
ETISALAT .AD have negative performance today by -0.36 %, FAB.AD has a positive performance today by + 1.68 %



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