



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

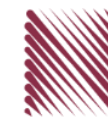
GCC DAILY MORNING BRIEF

Thursday, August 10th 2023



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

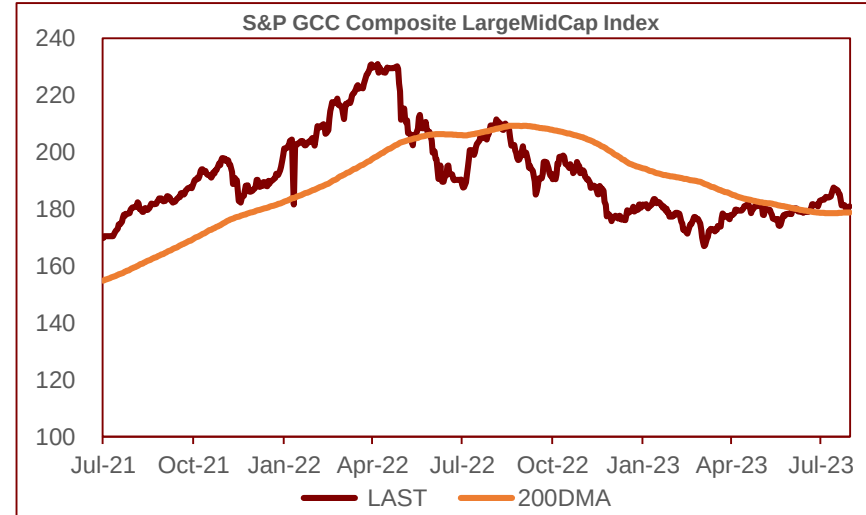


Market Watch

Saturday, August 12, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,424.12	1.22	0.42	-2.29	-0.30	9.02	11,289 SAR	1.99	18.57
Qatar (QE Index)	10,735.63	0.18	-0.59	-2.07	6.56	0.51	567 QAR	1.39	12.67
Dubai (DFMGI)	4,064.31	-0.53	-0.06	-0.26	6.77	21.37	581 AED	1.60	21.39
Abu Dhabi (ADI)	9,879.70	-0.49	1.23	1.20	3.71	-3.00	1,435 AED	1.84	21.16
Bahrain (BAX)	1,972.27	-0.11	-0.51	-0.62	0.74	4.06	9 BHD	6.36	18.00
MUSCAT SE INDEX	4,757.21	-0.35	-0.55	-0.40	-0.23	-2.06	5 OMR	0.99	13.25
SP GCC Comp LMC	180.85	0.33	-0.22	-2.49	1.00	1.13			
SP UAE PRICE INDEX	141.34	-0.75	0.11	-0.10	5.09	2.68			
Developed Markets									
MSCI World Index	2,972.73	0.29	-0.18	-2.59	0.61	14.68			
U.S. (S&P 500)	4,464.05	0.03	-0.73	-2.62	0.41	16.39			
U.K. (FTSE 100)	7,524.16	0.41	1.19	-1.05	1.16	2.24			
Japan (Topix)	2,303.51	0.92	1.55	-0.82	0.65	21.77			
Emerging Markets									
MSCI EM Index	997.72	-0.01	-0.73	-3.68	1.91	5.43			
China (SSE Composite)	3,189.25	0.31	-0.79	-1.11	1.64	5.35			
India (Sensex)	65,322.65	-0.47	0.69	-1.26	1.50	7.97			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,147.93	-0.48	0.04	-1.46	1.68	-1.98	46.13 KWD	1.71	18.96
Kuwait Premier Index	7,860.65	-0.70	-0.92	-2.48	0.66	-3.14	35.59 KWD	1.64	17.08
Kuwait Main Index	5,781.78	0.38	3.90	2.69	5.82	3.31	10.55 KWD	1.96	25.37
NIC 50	9,294.93	1.96	-0.93	-2.49	0.65	2.32	28.60 KWD	1.62	16.08
Kuwait Sector									
Banking	1,741.40	-0.63	0.28	-1.56	2.09	-2.93	29.28 KWD	1.14	18.08
Telecom	1,100.27	-0.16	-0.38	-1.19	-1.53	-6.87	3.38 KWD	1.33	8.75
Industrials	987.75	-0.62	0.18	-1.36	-1.53	-8.45	3.49 KWD	0.84	18.37
Financial services	1,275.50	-0.08	0.16	-1.15	3.95	1.45	3.67 KWD	0.76	24.44
Real estate	1,233.53	0.67	-0.48	-1.32	2.15	2.05	2.67 KWD	0.63	29.58
Basic materials	850.72	-0.75	-1.79	-3.67	-6.25	-1.66	0.76 KWD	2.05	8.01
Health care	455.49	-0.07	0.27	0.27	1.35	-1.38	0.23 KWD	0.95	6.68
Consumer services	565.15	-2.83	-7.98	-9.09	-8.12	17.75	0.79 KWD	0.87	13.44
Insurance	2,197.08	-0.38	-0.55	0.83	4.13	41.67	0.90 KWD	0.86	12.10
Consumer Disc	1,696.07	-1.44	-1.45	-1.44	8.72	14.07	0.17 KWD	1.07	35.40
Energy	1,009.09	-0.17	1.20	1.02	-1.01	-11.37	0.21 KWD	0.72	4.41
Technology	595.82	0.49	0.12	3.28	-11.84	-14.42	0.01 KWD	0.74	0.00
Utilities	510.53	-0.51	0.00	-3.96	-3.00	3.19	0.21 KWD	1.95	15.89



What Move the GCC markets

Oil Prices

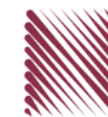
Oil prices edged higher on Friday after the International Energy Agency forecast record global demand and tightening supplies, propelling prices to the seventh straight week of gains, the longest such streak since 2022. Brent crude futures rose 19 cents, or 0.22%, to settle \$86.59 a barrel.

Kuwait Market

The market closed down by -0.48% at 7,147.93 value traded 43.8 million KD, Premier market value traded reached 33.5 million KD down -0.70% at 7,860.65

KSA Market

The market closed up today by 1.22% at 11,424.12



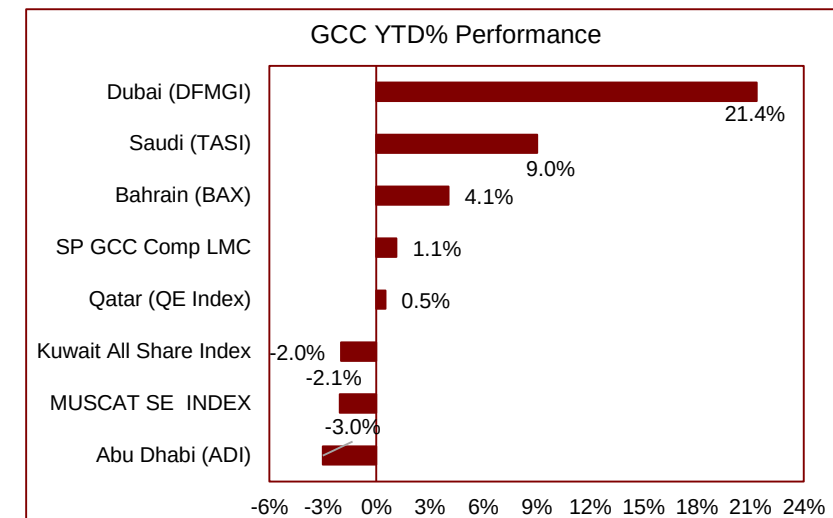
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.930	-0.75	-2.31	-3.33	-0.53	-9.42	7.38 KWD	1.79	27.00
KFH	0.765	-0.65	-0.65	-3.04	2.68	2.25	11.30 KWD	1.95	32.00
Zain	0.515	-0.39	-0.58	-1.15	-0.58	-8.53	2.23 KWD	1.74	10.98
BOUBYAN BANK	0.624	-1.27	-0.16	0.65	-2.50	-17.11	2.47 KWD	2.56	34.00
Agility	0.631	-0.94	0.48	0.16	1.28	-12.36	1.69 KWD	0.89	22.75
Saudi Arabia									
ARAMCO	34.00	2.56	5.43	4.94	5.43	16.51	8,228.00 SAR	5.38	16.13
SABIC	87.30	1.39	2.71	1.87	-1.02	-2.35	261.90 SAR	1.40	35.00
STC	41.40	2.10	-0.24	-2.36	-4.83	13.11	207.00 SAR	2.73	16.30
AL-RAJHI BANK	72.00	-0.14	0.84	-3.49	-1.37	-4.26	288.00 SAR	2.79	16.91
NCB	36.00	0.98	-3.36	-6.61	-2.17	-4.48	216.00 SAR	1.26	11.28
United Arab Emirates									
ETISALAT.AD	22.10	-0.90	0.09	-1.34	-1.34	-3.32	206.60 AED	5.10	21.10
FAB.AD	14.30	-1.65	-1.38	-2.32	4.84	-16.37	156.21 AED	1.34	12.12
EMIRATES NBD	16.30	-1.81	-1.21	-4.12	9.76	25.38	106.12 AED	1.08	5.29
DB ISLAMIC BK	5.76	0.70	-1.03	0.17	5.30	1.05	41.20 AED	0.99	7.67
EMAAR PROPERT	6.85	-2.14	-1.15	1.33	6.86	16.89	60.99 AED	0.85	7.22
Qatar									
QNB	16.56	-1.13	-2.59	-2.47	7.39	-8.00	153.06 QAR	1.49	11.09
INDUSTRIES QAT	13.50	2.51	-1.32	1.28	20.21	5.39	81.73 QAR	2.18	14.93
QA ISLAMIC BK	20.25	0.40	2.79	-4.26	14.34	9.11	47.88 QAR	1.74	12.09
MASRAF AL RAYA	2.49	0.44	-0.28	-0.68	-2.73	-21.38	23.20 QAR	0.97	22.36
MESAIED PETRO	1.93	-0.67	-2.08	-1.08	1.53	-9.31	24.23 QAR	1.46	18.44
OMAN									
BANK MUSCAT	0.280	-0.36	0.00	0.00	1.45	1.82	2.10 OMR	0.94	8.33
OMANTEL	1.000	12.61	0.10	0.50	0.81	8.70	0.75 OMR	1.23	7.69
BANK DHOFAR	0.175	0.00	0.00	0.57	1.16	0.00	0.52 QAR	0.73	14.93
NAT BANK OF OMAN	0.294	-1.67	-0.68	1.73	5.00	1.73	0.48 QAR	0.73	12.71
OMINVEST	0.380	0.00	0.80	-2.31	0.53	-9.52	0.25 QAR	0.71	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
2-August 23	24.38%	15.05%	0.07%	1.93%	0.24%	5.03%	17.57%	13.73%	6.14%	4.56%
9-August 23	24.42%	15%	0.07%	2.09%	0.24%	5.07%	17.57%	13.68%	6.14%	4.54%

End of Report

The information contained in this document is proprietary to NIC and is for use only by the persons to whom it is issued. This document may not be distributed either in part or in whole without the express agreement of NIC. It is intended solely for the use of the individual or entity to whom it is addressed and others authorized to receive it.

Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.48 %The leading sector bottom performance indices today are Consumer services -2.83 % Consumer Disc -1.44 % Basic materials -0.75 % respectively.

KSA

Saudi Armco has a positive performance today by + 2.56 %, SABIC have positive performance today by + 1.39%. STC has a positive performance today by + 2.1 %, Al Rajhi Bank have negative performance today by -0.14 %

U.A.E

ETISALAT .AD have negative performance today by -0.9 %, FAB.AD have negative performance today by -1.65 %



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

Sharq, Al Mutanabi Street, Khaleejia Tower | P.O. Box 25667, Safat 13117, Kuwait

T.: +965 2226 6666 | Fax: +965 2226 6793 | www.nic.com.kw