

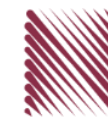


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday , July 10th 2023



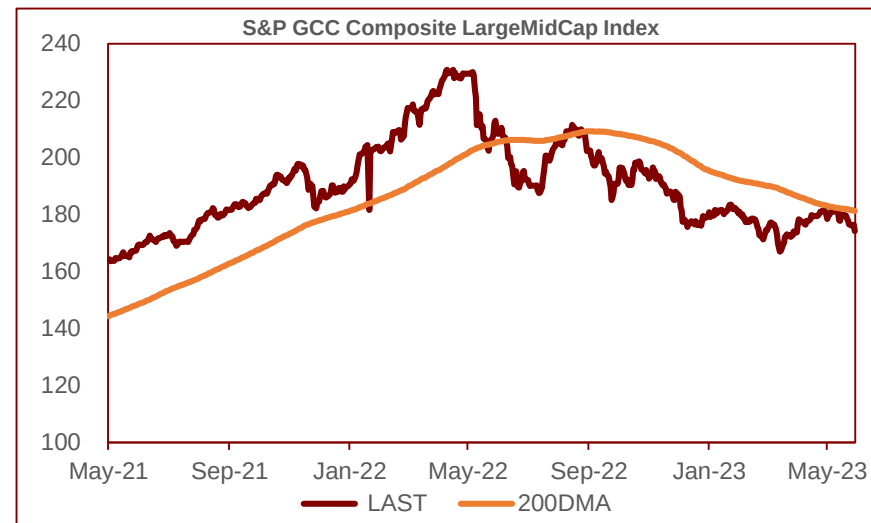


Market Watch

Monday, July 10, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,586.93	-0.19	-0.09	1.12	1.12	10.58	10,931 SAR	2.13	18.95
Qatar (QE Index)	10,104.09	-1.62	-1.38	0.29	0.29	-5.40	537 QAR	1.39	11.28
Dubai (DFMGI)	3,977.27	0.37	0.37	4.89	4.89	19.22	575 AED	1.56	22.62
Abu Dhabi (ADI)	9,584.78	-0.20	-0.20	0.36	0.36	-6.13	1,435 AED	1.83	21.28
Bahrain (BAX)	1,957.60	0.16	-0.08	-0.01	-0.01	3.29	9 BHD	7.20	18.00
MUSCAT SE INDEX	4,776.15	-0.26	-0.29	0.17	0.17	-1.67	5 OMR	1.02	13.25
SP GCC Comp LMC	180.87	-0.41	-0.29	1.04	1.04	1.17			
SP UAE PRICE INDEX	137.13	-0.14	-0.34	2.08	2.08	-0.26			
Developed Markets									
MSCI World Index	2,931.05	0.23	0.22	-1.20	-1.20	12.62			
U.S. (S&P 500)	4,409.53	0.24	-0.05	-0.92	-0.92	14.85			
U.K. (FTSE 100)	7,273.79	0.23	-0.09	-3.42	-3.42	-2.39			
Japan (Topix)	2,243.33	-0.51	-1.48	-1.98	-1.98	18.59			
Emerging Markets									
MSCI EM Index	981.88	0.12	-0.29	-0.77	-0.77	2.67			
China (SSE Composite)	3,203.70	0.22	-0.06	0.05	0.05	3.70			
India (Sensex)	65,344.17	0.10	-0.67	0.97	0.97	7.40			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,215.10	0.20	0.46	2.64	2.64	-1.06	46.51 KWD	1.78	18.70
Kuwait Premier Index	8,032.94	0.16	0.53	2.86	2.86	-1.02	36.35 KWD	1.71	18.57
Kuwait Main Index	5,557.52	0.36	0.16	1.72	1.72	-0.70	10.15 KWD	2.01	19.20
NIC 50	9,116.27	0.00	0.52	2.85	2.85	0.36	28.60 KWD	1.69	17.57
Kuwait Sector									
Banking	1,755.71	0.29	0.52	2.93	2.93	-2.13	29.46 KWD	1.24	19.57
Telecom	1,137.13	0.28	1.06	1.76	1.76	-3.75	3.49 KWD	1.41	9.13
Industrials	1,020.02	-0.09	0.33	1.69	1.69	-5.46	3.59 KWD	0.87	21.37
Financial services	1,255.41	0.34	-0.19	2.32	2.32	-0.15	3.61 KWD	0.75	19.43
Real estate	1,233.02	-0.66	-0.19	2.11	2.11	2.01	2.67 KWD	0.62	22.60
Basic materials	904.13	0.85	-0.82	-0.36	-0.36	4.51	0.79 KWD	1.42	8.84
Health care	453.68	0.13	0.00	0.94	0.94	-1.77	0.22 KWD	0.94	6.60
Consumer services	612.29	-0.76	-0.95	-0.46	-0.46	27.57	0.84 KWD	0.87	14.07
Insurance	2,106.82	0.60	0.58	-0.15	-0.15	35.85	0.87 KWD	0.80	10.19
Consumer Disc	1,707.63	-0.21	2.47	9.46	9.46	14.85	0.19 KWD	1.11	0.00
Energy	1,033.35	0.15	1.89	1.37	1.37	-9.24	0.22 KWD	0.78	4.63
Technology	667.84	0.00	0.00	-1.19	-1.19	-4.08	0.01 KWD	0.83	0.00
Utilities	528.95	0.00	-1.47	0.50	0.50	6.91	0.22 KWD	2.02	16.46



What Move the GCC markets

Oil Prices

Oil prices edged higher on Tuesday, recouping some of the losses from the previous session, as traders focused on supply cuts by the world's biggest oil exporters Saudi Arabia and Russia and awaited data that could help ascertain demand. Brent crude futures rose 33 cents, or 0.4%, to \$78 a barre

Kuwait Market

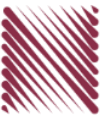
The market closed up today by + 0.2% at 7,215.1 value traded 43.3 million KD, Premier market value traded reached 34.8 million KD up + 0.16% at 8,032.94.

KSA Market

The market closed down today by – 0.19% at 11,586.93.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



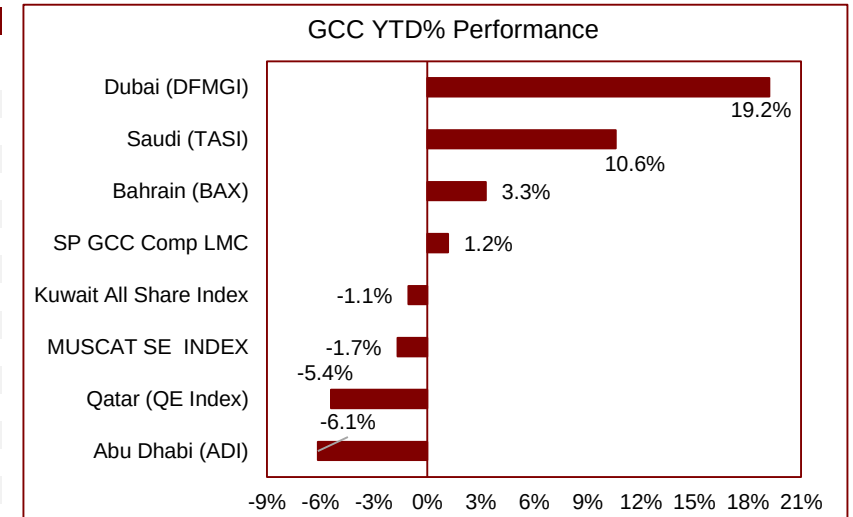
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.960	0.31	0.31	2.67	2.67	-6.49	7.61 KWD	1.93	27.00
KFH	0.770	0.26	0.65	3.36	3.36	2.92	11.37 KWD	1.96	32.00
Zain	0.531	0.38	1.53	2.51	2.51	-5.68	2.30 KWD	1.79	11.32
BOUBYAN BANK	0.656	0.15	0.31	2.50	2.50	-12.86	2.60 KWD	2.93	34.00
Agility	0.634	-0.16	0.48	1.77	1.77	-11.94	1.70 KWD	0.89	22.86
Saudi Arabia									
ARAMCO	32.15	-0.46	-0.46	-0.31	-0.31	10.17	7,780.09 SAR	5.21	13.90
SABIC	88.80	-0.56	0.23	0.68	0.68	-0.67	266.39 SAR	1.42	35.00
STC	44.75	0.34	1.02	2.87	2.87	22.27	223.74 SAR	2.99	18.19
AL-RAJHI BANK	72.10	-0.55	-0.55	-1.23	-1.23	-4.12	288.39 SAR	2.91	16.90
NCB	36.70	-0.14	-0.41	-0.27	-0.27	-2.63	220.19 SAR	1.28	11.86
United Arab Emirates									
ETISALAT.AD	21.84	-1.18	-1.62	-2.50	-2.50	-4.46	206.60 AED	5.10	21.10
FAB.AD	13.58	-1.16	-1.45	-0.44	-0.44	-20.58	150.04 AED	1.34	12.79
EMIRATES NBD	16.20	1.57	0.31	9.09	9.09	24.62	102.34 AED	1.07	6.12
DB ISLAMIC BK	5.53	0.55	0.00	1.10	1.10	-2.98	40.05 AED	0.99	7.69
EMAAR PROPERT	6.84	-0.58	0.74	6.71	6.71	16.72	60.46 AED	0.85	7.21
Qatar									
QNB	15.71	-2.84	-3.02	1.88	1.88	-12.72	145.02 QAR	1.43	10.37
INDUSTRIES QAT	11.40	-2.81	-2.56	1.51	1.51	-11.01	68.93 QAR	1.89	9.48
QA ISLAMIC BK	17.62	-1.56	-1.56	-0.51	-0.51	-5.06	41.61 QAR	1.56	10.76
MASRAF AL RAYA	2.50	-1.18	-1.07	-2.30	-2.30	-21.03	23.27 QAR	0.99	19.04
MESAIEED PETRO	1.91	-0.26	-0.36	0.68	0.68	-10.06	24.02 QAR	1.47	15.09
OMAN									
BANK MUSCAT	0.278	-0.36	-0.71	0.72	0.72	1.09	2.09 OMR	0.96	8.33
OMANTEL	0.988	11.26	1.86	-0.40	-0.40	7.39	0.74 OMR	1.22	7.69
BANK DHOFAR	0.173	0.00	0.00	0.00	0.00	-1.14	0.52 QAR	0.73	14.93
NAT BANK OF OMAN	0.286	0.00	0.35	2.14	2.14	-1.04	0.47 QAR	0.72	12.71
OMINVEST	0.380	0.53	-1.04	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
28-June 23	24.31%	15.55%	0.06%	1.58%	0.24%	5.23%	17.63%	13.91%	6.22%	4.58%
05-July 23	24.3%	15.55%	0.066%	1.72%	0.24%	5.22%	17.6%	13.9%	6.23%	4.48%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.2 %The leading sector best performance indices today are Basic materials 0.85 % Insurance 0.6 % Financial services 0.34 % respectively

KSA

Saudi Armco have negative performance today by -0.46 %, SABIC have negative performance today by -0.55%. STC has a positive performance today by + 0.34 %, Al Rajhi Bank have negative performance today by -0.55 %

U.A.E

ETISALAT .AD have negative performance today by -1.18 %, FAB.AD have negative performance today by -1.16 %



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