



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday , July 11th 2023



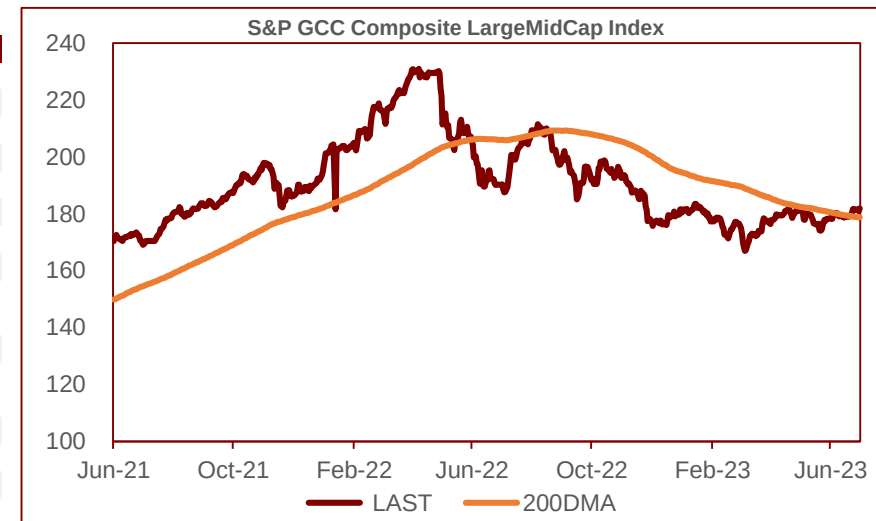


Market Watch

Tuesday, July 11, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
		%	%	%	%	%			
Saudi (TASI)	11,664.50	0.67	0.57	1.79	1.79	11.32	10,943 SAR	2.13	19.05
Qatar (QE Index)	10,084.51	-0.19	-1.57	0.10	0.10	-5.59	536 QAR	1.39	11.31
Dubai (DFMGI)	3,985.41	0.20	0.58	5.10	5.10	19.46	574 AED	1.56	22.66
Abu Dhabi (ADI)	9,589.29	0.05	-0.16	0.41	0.41	-6.09	1,435 AED	1.83	21.28
Bahrain (BAX)	1,959.58	0.10	0.02	0.09	0.09	3.39	9 BHD	7.20	18.00
MUSCAT SE INDEX	4,801.88	0.54	0.24	0.71	0.71	-1.14	5 OMR	1.02	13.25
SP GCC Comp LMC	181.88	0.56	0.26	1.60	1.60	1.73			
SP UAE PRICE INDEX	136.92	-0.15	-0.49	1.92	1.92	-0.42			
Developed Markets									
MSCI World Index	2,953.12	0.75	0.98	-0.46	-0.46	13.46			
U.S. (S&P 500)	4,439.26	0.67	0.63	-0.25	-0.25	15.62			
U.K. (FTSE 100)	7,282.52	0.12	0.03	-3.31	-3.31	-2.27			
Japan (Topix)	2,236.40	-0.31	-1.79	-2.28	-2.28	18.22			
Emerging Markets									
MSCI EM Index	994.89	1.33	1.04	0.55	0.55	4.03			
China (SSE Composite)	3,221.37	0.55	0.49	0.60	0.60	4.28			
India (Sensex)	65,617.84	0.42	-0.26	1.39	1.39	7.85			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
		%	%	%	%	%			
Kuwait All Share Index	7,263.48	0.67	1.13	3.32	3.32	-0.39	46.80 KWD	1.79	18.76
Kuwait Premier Index	8,099.43	0.83	1.37	3.71	3.71	-0.20	36.65 KWD	1.73	18.74
Kuwait Main Index	5,559.05	0.03	0.18	1.75	1.75	-0.67	10.15 KWD	1.98	18.88
NIC 50	9,116.27	0.00	1.36	3.70	3.70	0.36	28.60 KWD	1.71	17.74
Kuwait Sector									
Banking	1,775.77	1.14	1.67	4.10	4.10	-1.01	29.76 KWD	1.25	19.74
Telecom	1,140.35	0.28	1.35	2.05	2.05	-3.48	3.50 KWD	1.41	9.16
Industrials	1,022.88	0.28	0.61	1.98	1.98	-5.19	3.60 KWD	0.82	20.53
Financial services	1,250.67	-0.38	-0.57	1.93	1.93	-0.52	3.60 KWD	0.76	19.84
Real estate	1,230.85	-0.18	-0.37	1.93	1.93	1.83	2.66 KWD	0.62	22.66
Basic materials	903.06	-0.12	-0.93	-0.48	-0.48	4.39	0.79 KWD	1.42	8.84
Health care	453.68	0.00	0.00	0.94	0.94	-1.77	0.22 KWD	0.94	6.60
Consumer services	614.05	0.29	-0.66	-0.17	-0.17	27.94	0.83 KWD	0.86	13.89
Insurance	2,105.80	-0.05	0.53	-0.20	-0.20	35.79	0.87 KWD	0.77	10.19
Consumer Disc	1,695.59	-0.71	1.75	8.69	8.69	14.04	0.19 KWD	1.11	0.00
Energy	1,029.53	-0.37	1.51	1.00	1.00	-9.57	0.22 KWD	0.74	4.63
Technology	635.11	-4.90	-4.90	-6.03	-6.03	-8.78	0.01 KWD	0.79	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 jumped on Tuesday, settling up about 2%, boosted by a falling U.S. dollar, hopes for higher demand in the developing world and supply cuts by the world's biggest oil exporters. Brent futures rose \$1.71, or 2.2%, to settle at \$79.40 a barrel.

Kuwait Market

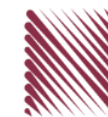
The market closed up today by + 0.67% at 7,263.48 value traded 53.2 million KD, Premier market value traded reached 42.3 million KD up + 0.83% at 8,099.43.

KSA Market

The market closed up today by 0.67% at 11,664.50.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



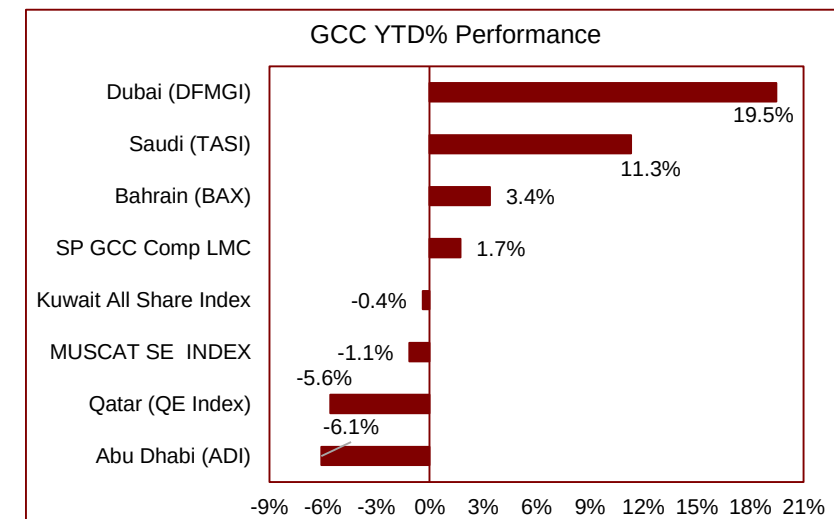
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.973	1.35	1.67	4.06	4.06	-5.23	7.72 KWD	1.95	27.00
KFH	0.779	1.17	1.83	4.56	4.56	4.12	11.50 KWD	1.98	32.00
Zain	0.532	0.19	1.72	2.70	2.70	-5.51	2.30 KWD	1.79	11.34
BOUBYAN BANK	0.658	0.30	0.61	2.81	2.81	-12.60	2.61 KWD	2.94	34.00
Agility	0.642	1.26	1.74	3.05	3.05	-10.83	1.72 KWD	0.90	23.14
Saudi Arabia									
ARAMCO	32.10	-0.16	-0.62	-0.47	-0.47	10.00	7,767.58 SAR	5.21	13.84
SABIC	88.50	-0.34	-0.11	0.34	0.34	-1.01	265.48 SAR	1.42	35.00
STC	45.25	1.12	2.14	4.02	4.02	23.63	226.23 SAR	3.02	18.25
AL-RAJHI BANK	72.70	0.83	0.28	-0.41	-0.41	-3.32	290.78 SAR	2.93	16.80
NCB	37.10	1.09	0.68	0.82	0.82	-1.56	222.58 SAR	1.29	11.84
United Arab Emirates									
ETISALAT.AD	21.74	-0.46	-2.07	-2.95	-2.95	-4.90	206.60 AED	5.10	21.10
FAB.AD	13.40	-1.33	-2.76	-1.76	-1.76	-21.64	148.02 AED	1.32	12.62
EMIRATES NBD	16.30	0.62	0.93	9.76	9.76	25.38	102.95 AED	1.08	6.16
DB ISLAMIC BK	5.58	0.90	0.90	2.01	2.01	-2.11	40.40 AED	1.00	7.76
EMAAR PROPERT	6.80	-0.58	0.15	6.08	6.08	16.04	60.10 AED	0.84	7.17
Qatar									
QNB	15.73	0.13	-2.90	2.01	2.01	-12.61	145.37 QAR	1.43	10.55
INDUSTRIES QAT	11.26	-1.23	-3.76	0.27	0.27	-12.10	68.16 QAR	1.87	9.36
QA ISLAMIC BK	17.68	0.34	-1.23	-0.17	-0.17	-4.74	41.80 QAR	1.57	10.80
MASRAF AL RAYA	2.51	0.24	-0.83	-2.07	-2.07	-20.85	23.36 QAR	0.99	19.09
MESAIEED PETRO	1.93	0.63	0.26	1.32	1.32	-9.50	24.20 QAR	1.48	15.18
OMAN									
BANK MUSCAT	0.280	0.72	0.00	1.45	1.45	1.82	2.10 OMR	0.97	8.33
OMANTEL	0.990	11.49	2.06	-0.20	-0.20	7.61	0.74 OMR	1.22	7.69
BANK DHOFAR	0.175	1.16	1.16	1.16	1.16	0.00	0.52 QAR	0.74	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	0.00	-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, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.67 %The leading sector best performance indices today are Banking 1.14 % Consumer services 0.29 % Telecom 0.28 % respectively.

KSA

Saudi Armco have negative performance today by -0.16 %, SABIC have negative performance today by -0.33%. STC has a positive performance today by + 1.12 %, Al Rajhi Bank has a positive performance today by + 0.83 %

U.A.E

ETISALAT .AD have negative performance today by -0.46 %, FAB.AD have negative performance today by -1.33 %



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