



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, September 11th 2023





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Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,235.14	0.73	0.17	-2.23	-1.95	7.22	2.05	18.28	3.42	11,190.63
Qatar (QE Index)	10,403.62	0.55	1.62	2.05	3.27	-2.60	1.25	12.51	4.73	530.63
Dubai (DFMGI)	4,070.17	0.07	0.07	-0.31	7.34	22.00	1.48	9.94	4.38	581.51
Abu Dhabi (ADI)	9,712.50	0.23	0.23	-1.00	1.70	-4.88	2.44	15.30	2.25	2,731.72
Bahrain (BAX)	1,939.03	-0.12	-0.15	-0.67	-0.96	2.31	0.77	9.37	6.01	7.05
Muscat SE INDEX	4,698.20	0.04	0.17	-2.10	-1.47	-3.28	0.86	10.27	4.75	6.58
SP GCC Comp LMC	176.72	0.59	0.35	-1.25	-1.28	-1.15	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	138.53	0.34	0.34	-0.13	3.12	0.75				
Developed Markets										
MSCI World Index	2,969.45	0.70	0.70	-0.55	0.09	14.09				
U.S. (S&P 500)	4,487.46	0.67	0.67	-0.45	0.83	16.88	3.95	22.68	2.03	39,299.95
U.K. (FTSE 100)	7,496.87	0.25	0.25	0.78	-0.46	0.61	1.57	10.49	3.94	2,021.22
Japan (topix)	2,360.48	0.06	0.06	1.22	3.14	24.78	1.38	14.06	2.17	852,114.97
Emerging Markets										
MSCI EM Index	977.50	0.37	0.37	-0.29	-1.21	2.21				
China (SSE Composite)	3,142.78	0.84	0.84	0.73	-1.85	1.73	1.36	12.00		44,025.04
India (Sensex)	67,127.08	0.79	0.79	3.54	3.72	10.33	4.36	23.30	1.18	130,624.28

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,015.52	-0.11	0.08	0.14	-0.20	-3.79	1.48	15.73	3.23	45.56
Kuwait Premier Index	7,698.31	-0.16	0.09	0.04	-1.42	-5.14	1.65	17.38	3.06	36.53
Kuwait Main Index	5,721.37	0.06	0.03	0.51	4.72	2.23	1.05	11.06	3.93	9.04
Kuwait Sector										
Banking	1,698.93	-0.19	-0.08	0.04	-0.40	-5.29	1.72	17.80	2.71	28.84
Telecom	1,113.71	-0.29	-0.40	0.83	-0.33	-5.73	1.69	10.40	6.32	3.43
Industrials	946.65	-0.27	0.16	0.64	-5.62	-12.26	1.06	16.55	2.95	3.34
Financial Services	1,273.25	-0.12	0.22	0.27	3.77	1.27	1.02	14.85	3.89	4.05
Real Estate	1,226.25	0.60	1.33	0.93	1.55	1.45	0.95	15.01	2.07	2.61
Basic Materials	876.00	0.41	0.57	-0.51	-3.46	1.26	1.52	9.73	8.96	0.49
Health Care	482.72	2.77	2.77	0.00	7.40	4.52	1.70	12.07	1.77	0.23
Consumer Staples	615.87	0.45	1.30	1.19	0.13	28.32	1.41	77.58	2.01	0.19
Insurance	2,223.28	-0.41	0.16	-1.27	5.37	43.36	1.26	7.50	4.18	0.90
Consumer Discretionary	1,569.15	0.22	0.61	-1.93	0.58	5.54				
Energy	994.69	0.10	-0.18	-0.09	-2.42	-12.63	0.79	10.09	5.11	0.21
Technology	563.08	0.00	0.00	-3.25	-16.69	-19.12	0.69			0.01
Utilities	505.26	0.52	0.00	-1.03	-4.00	2.13				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices eased in early Asian trade on Monday as economic concerns in China weighed on fuel demand outlook although Brent stayed perched above \$90 a barrel, supported by tightening supplies after Saudi Arabia and Russia extended supply cuts. Brent crude fell 49 cents, or 0.5%, to \$90.16 a barrel

Kuwait Market

The market closed down by - 0.11% at 7,015.52 value traded 25.0 million KD, Premier market value reached 14.1 million KD down - 0.16% at 7,698.31

KSA Market

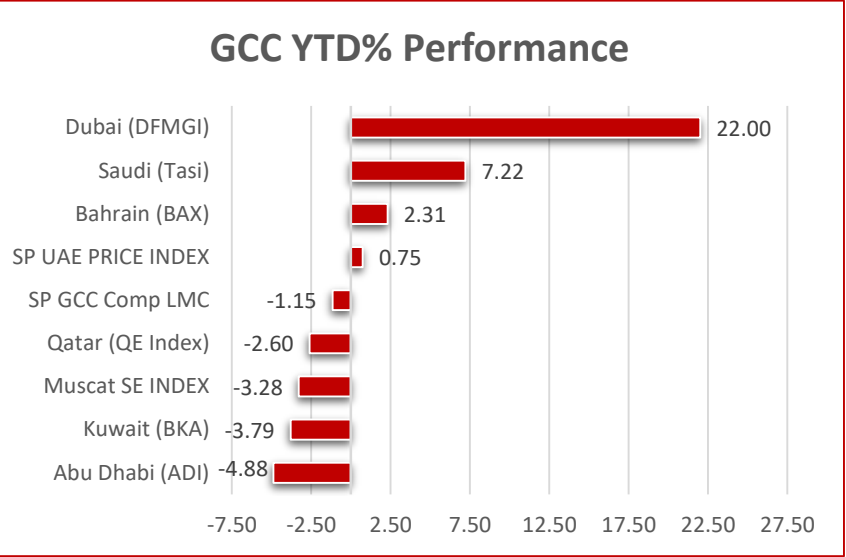
The market closed up today by + 0.73% at 11,235.14



Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.919	-0.11	0.00	-0.11	-1.71	-10.49	13.89	1.77	3.68	7.29
KFH	0.748	-0.27	-0.13	0.40	0.40	-0.02	19.48	1.91	2.25	11.04
ZAIN	0.505	-0.20	0.20	-0.98	-2.51	-10.30	10.40	1.77	6.93	2.18
BOUBYAN BANK	0.615	0.16	0.00	0.82	-3.91	-18.31	40.70	2.52	0.92	2.44
AGILITY	0.574	-0.35	-0.35	-0.17	-7.87	-20.28	21.31	0.77	0.00	1.54
Saudi Arabia										
ARAMCO	33.80	-0.44	-1.02	-3.15	4.81	15.83	16.10	5.35	4.00	8,175.46
SABIC	90.00	1.47	1.24	1.81	2.04	0.67	68.11	1.53	4.22	269.86
STC	39.70	1.28	1.53	-0.25	-8.74	8.47	15.99	2.62	4.03	198.40
AL-RAJHI BANK	70.80	0.85	0.00	-1.94	-3.01	-5.85	16.61	2.74	2.51	283.06
NCB	34.85	-0.14	-0.71	-2.52	-5.30	-7.53	11.01	1.22	3.72	208.99
Abu Dhabi										
ETISALAT.AD	19.50	0.72	0.72	-1.71	-12.95	-14.70	17.21	4.06	4.10	169.56
FAB.AD	13.36	0.00	0.00	-2.34	-2.05	-21.87	11.32	1.27	3.89	147.58
EMIRATES NBD	16.90	0.90	0.90	3.36	13.80	30.00	5.49	1.08	3.55	106.74
DB ISLAMIC DB	5.64	0.36	0.36	0.00	3.11	-1.05	7.51	0.98	5.32	40.83
EMAR.DU	7.10	1.43	1.43	0.57	10.76	21.16	7.95	0.88	3.52	62.75
Qatar										
QNB	15.350	0.79	1.12	-1.60	-0.45	-14.72	10.28	1.38	3.91	141.76
INDUSTREIS QAT	14.000	0.07	3.55	13.27	24.67	9.29	16.22	2.26	7.86	84.69
QA ISLAMIC BK	19.190	-0.52	0.73	-0.67	8.36	3.39	11.46	1.65	3.26	45.34
MASRAF AL RAYA	2.284	4.05	7.84	2.88	-10.89	-27.97	20.48	0.89	4.38	21.24
MESAIEED PETRO	1.864	-1.32	-0.32	1.30	-1.89	-12.36	17.82	1.41	5.90	23.41
Oman										
BANK MUSCAT	0.284	0.35	1.07	-0.35	2.90	3.27	11.18	0.95	5.28	2.13
OMANTEL	1.007	-0.10	0.20	-2.23	1.51	9.46	32.57	1.20	3.23	0.76
BANK DHOFAR	0.170	0.00	-0.58	-2.86	-1.73	-2.86	19.52	0.71	2.94	0.51
NAT BANK OF OMAN	0.295	0.00	0.34	-0.34	5.36	2.08	10.79	0.74	2.51	0.48
OMINVEST	0.396	0.51	-0.50	-0.50	4.76	-5.71	5.82	0.88	3.79	0.26
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
30-August- 23	24.38%	14.96%	0.07%	2.17%	0.24%	5.16%	17.53%	13.56%	6.12%	4.7%
6-September-23	24.37%	14.52%	0.07%	2.21%	0.24%	5.10%	17.55%	13.48%	6.06%	4.86%

End of Report
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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is down today by - 0.11%. The leading sector bottom performance indices today are Insurance - 0.41% , Telecom - 0.29 % , Industrials - 0.27 % , Banking - 0.19 % respectively

KSA
Saudi Armco has a negative performance today by – 0.44%, SABIC has a positive performance today by + 1.47 % , STC has a positive performance today by + 1.28%, Al Rajhi Bank has a positive performance today by + 0.85%

U.A.E
ETISALAT .AD has a positive performance today by + 0.72 % , FAB.AD has a flat performance today



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