



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, July 12th 2023





Market Watch

Wednesday, July 12, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,727.19	0.54	1.11	2.34	2.34	11.92	10,990 SAR	2.08	19.12
Qatar (QE Index)	10,122.77	0.38	-1.20	0.48	0.48	-5.23	537 QAR	1.39	11.38
Dubai (DFMGI)	3,987.07	0.04	0.62	5.14	5.14	19.51	575 AED	1.56	22.74
Abu Dhabi (ADI)	9,621.62	0.34	0.18	0.75	0.75	-5.77	1,435 AED	1.83	21.19
Bahrain (BAX)	1,969.97	0.53	0.55	0.62	0.62	3.94	9 BHD	6.79	18.00
MUSCAT SE INDEX	4,801.16	-0.01	0.23	0.69	0.69	-1.16	5 OMR	1.02	13.25
SP GCC Comp LMC	182.94	0.59	0.85	2.20	2.20	2.33			
SP UAE PRICE INDEX	137.61	0.50	0.01	2.43	2.43	0.08			
Developed Markets									
MSCI World Index	2,987.19	1.15	2.14	0.69	0.69	14.77			
U.S. (S&P 500)	4,472.16	0.74	1.37	0.49	0.49	16.48			
U.K. (FTSE 100)	7,416.11	1.83	1.86	-1.53	-1.53	-0.48			
Japan (Topix)	2,221.48	-0.67	-2.44	-2.93	-2.93	17.43			
Emerging Markets									
MSCI EM Index	1,005.55	1.07	2.12	1.63	1.63	5.14			
China (SSE Composite)	3,196.13	-0.78	-0.29	-0.19	-0.19	3.46			
India (Sensex)	65,393.90	-0.34	-0.60	1.04	1.04	7.48			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,289.32	0.36	1.49	3.69	3.69	-0.04	46.89 KWD	1.79	18.79
Kuwait Premier Index	8,125.51	0.32	1.69	4.05	4.05	0.12	36.70 KWD	1.73	18.78
Kuwait Main Index	5,586.55	0.49	0.68	2.25	2.25	-0.18	10.19 KWD	1.97	18.88
NIC 50	9,116.27	0.00	1.68	4.04	4.04	0.36	28.60 KWD	1.71	17.78
Kuwait Sector									
Banking	1,780.84	0.29	1.96	4.40	4.40	-0.73	29.80 KWD	1.26	19.78
Telecom	1,143.08	0.24	1.59	2.30	2.30	-3.25	3.50 KWD	1.41	9.18
Industrials	1,028.58	0.56	1.17	2.54	2.54	-4.66	3.62 KWD	0.81	20.41
Financial services	1,266.85	1.29	0.72	3.25	3.25	0.76	3.65 KWD	0.75	19.44
Real estate	1,231.32	0.04	-0.33	1.97	1.97	1.87	2.66 KWD	0.62	22.01
Basic materials	902.23	-0.09	-1.03	-0.57	-0.57	4.29	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	617.83	0.62	-0.05	0.45	0.45	28.73	0.83 KWD	0.88	14.08
Insurance	2,093.33	-0.59	-0.06	-0.79	-0.79	34.98	0.86 KWD	0.77	10.19
Consumer Disc	1,699.36	0.22	1.98	8.93	8.93	14.29	0.19 KWD	1.11	0.00
Energy	1,022.07	-0.72	0.78	0.26	0.26	-10.23	0.21 KWD	0.76	4.63
Technology	618.37	-2.64	-7.41	-8.50	-8.50	-11.18	0.01 KWD	0.77	0.00
Utilities	534.21	0.99	-0.49	1.50	1.50	7.98	0.22 KWD	2.04	16.63

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices rose in early Asian trade on Thursday after U.S. inflation and economic data sparked hopes the Federal Reserve may have fewer interest rate hikes in store for the world's biggest economy. Brent crude futures rose 6 cents to \$80.17 per barrel.

Kuwait Market

The market closed up today by 0.36% at 7,289.32 value traded 58.2 million KD, Premier market value traded reached 47.9 million KD up + 0.32% at 8,125.51

KSA Market

The market closed up today by 0.54% at 11,727.19

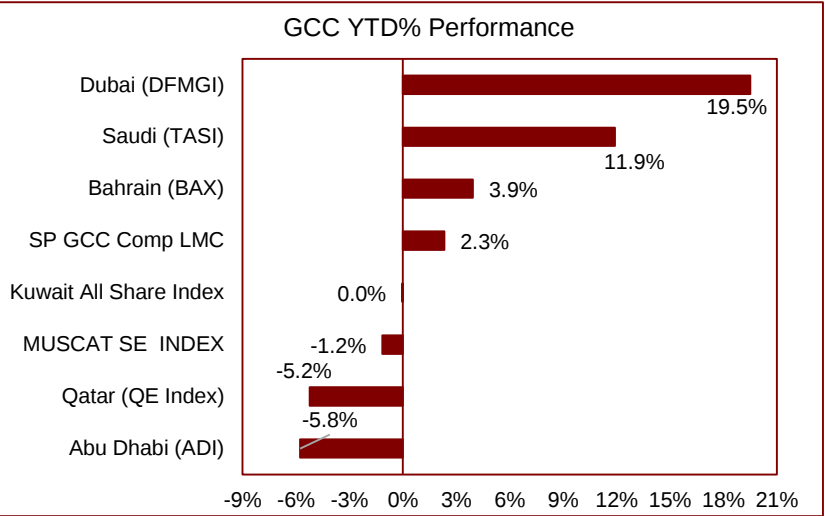


Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.979	0.62	2.30	4.71	4.71	-4.64	7.75 KWD	1.97	27.00
KFH	0.780	0.13	1.96	4.70	4.70	4.25	11.50 KWD	1.99	32.00
Zain	0.533	0.19	1.91	2.90	2.90	-5.33	2.30 KWD	1.80	11.36
BOUBYAN BANK	0.655	-0.46	0.15	2.34	2.34	-12.99	2.59 KWD	2.92	34.00
Agility	0.651	1.40	3.17	4.49	4.49	-9.58	1.74 KWD	0.91	23.47
Saudi Arabia									
ARAMCO	32.20	0.31	-0.31	-0.16	-0.16	10.34	7,793.44 SAR	5.22	13.82
SABIC	88.50	0.00	-0.11	0.34	0.34	-1.01	265.54 SAR	1.42	35.00
STC	45.00	-0.55	1.58	3.45	3.45	22.95	225.03 SAR	3.00	18.45
AL-RAJHI BANK	72.30	-0.55	-0.28	-0.96	-0.96	-3.86	289.24 SAR	2.91	16.94
NCB	37.65	1.48	2.17	2.31	2.31	-0.10	225.93 SAR	1.31	11.97
United Arab Emirates									
ETISALAT.AD	21.98	1.10	-0.99	-1.87	-1.87	-3.85	206.60 AED	5.10	21.10
FAB.AD	13.68	2.09	-0.73	0.29	0.29	-20.00	151.14 AED	1.35	12.88
EMIRATES NBD	16.20	-0.61	0.31	9.09	9.09	24.62	102.33 AED	1.07	6.12
DB ISLAMIC BK	5.56	-0.36	0.54	1.65	1.65	-2.46	40.26 AED	1.00	7.73
EMAAR PROPERT	6.83	0.44	0.59	6.55	6.55	16.55	60.37 AED	0.85	7.20
Qatar									
QNB	15.52	-1.34	-4.20	0.65	0.65	-13.78	143.42 QAR	1.39	10.40
INDUSTRIES QAT	11.50	2.13	-1.71	2.40	2.40	-10.23	69.61 QAR	1.90	9.56
QA ISLAMIC BK	17.70	0.11	-1.12	-0.06	-0.06	-4.63	41.84 QAR	1.57	10.81
MASRAF AL RAYA	2.51	0.00	-0.83	-2.07	-2.07	-20.85	23.35 QAR	0.99	19.09
MESAIEED PETRO	1.91	-0.73	-0.47	0.58	0.58	-10.16	24.02 QAR	1.47	15.07
OMAN									
BANK MUSCAT	0.281	0.36	0.36	1.81	1.81	2.18	2.11 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	0.177	1.14	2.31	2.31	2.31	1.14	0.53 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
08-June 23	24.34%	15.37%	0.06%	1.35%	0.23%	4.57%	17.66%	13.9%	6.09%	4.72%
14-June 23	24.3%	15.4%	0.06%	1.39%	0.23%	4.89%	17.66%	13.88%	6.14%	4.69%

End of Report
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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is up today by + 0.36 %The leading sector best performance indices today are Financial services 1.29 % Utilities 0.99 % Consumer services 0.62 % respectively

KSA
Saudi Armco has a positive performance today by + 0.31 %, SABIC flat performance today 0%. STC have negative performance today by -0.55 %, Al Rajhi Bank have negative performance today by -0.55 %

U.A.E
ETISALAT .AD has a positive performance today by + 1.1 %, FAB.AD has a positive performance today by + 2.09 %



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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