

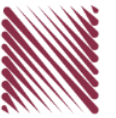


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, August 13th 2023

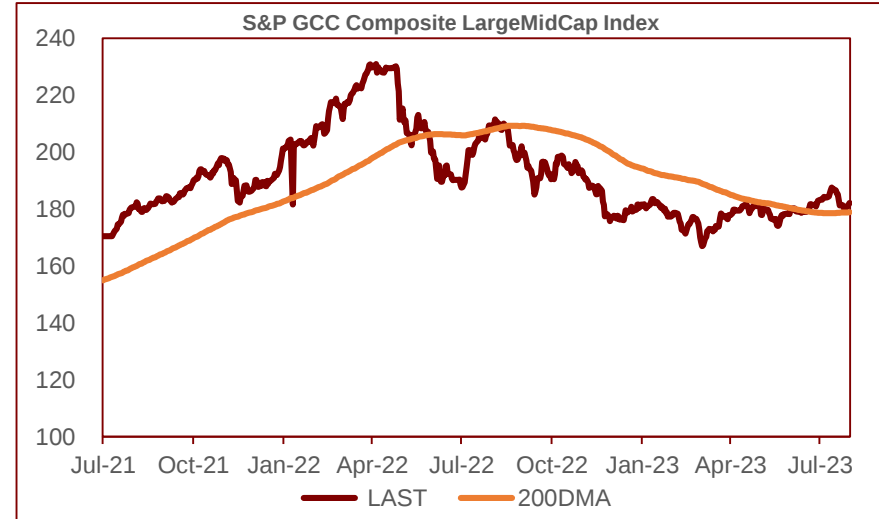




Market Watch

							Sunday, August 13, 2023		
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	11,546.15	1.07	1.07	-1.25	0.76	10.19	11,452 SAR	2.04	18.87
Qatar (QE Index)	10,777.99	0.39	0.39	-1.69	6.98	0.91	569 QAR	1.38	12.74
Dubai (DFMGI)	4,064.31	0.38	0.38	0.12	7.18	21.83	581 AED	1.60	21.42
Abu Dhabi (ADI)	9,879.70	-0.25	-0.25	0.95	3.45	-3.25	1,435 AED	1.84	20.95
Bahrain (BAX)	1,972.85	0.03	0.03	-0.59	0.77	4.09	9 BHD	6.68	18.00
MUSCAT SE INDEX	4,768.87	0.25	0.25	-0.15	0.01	-1.82	5 OMR	0.99	13.25
SP GCC Comp LMC	182.13	0.74	0.74	-1.77	1.74	1.88			
SP UAE PRICE INDEX	141.34	0.11	0.11	0.01	5.20	2.79			
Developed Markets									
MSCI World Index	2,972.73	-0.40	-0.40	-2.99	0.20	14.22			
U.S. (S&P 500)	4,464.05	-0.11	-0.11	-2.72	0.31	16.27			
U.K. (FTSE 100)	7,524.16	-1.24	-1.24	-2.28	-0.10	0.97			
Japan (Topix)	2,303.51	0.00	0.00	-0.82	0.65	21.77			
Emerging Markets									
MSCI EM Index	997.72	-1.05	-1.05	-4.70	0.83	4.32			
China (SSE Composite)	3,189.25	-2.01	-2.01	-3.09	-0.40	3.24			
India (Sensex)	65,322.65	-0.56	-0.56	-1.81	0.93	7.37			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,168.96	0.29	0.29	-1.17	1.98	-1.69	46.25 KWD	1.71	19.04
Kuwait Premier Index	7,887.67	0.34	0.34	-2.15	1.00	-2.81	35.72 KWD	1.65	17.20
Kuwait Main Index	5,787.77	0.10	0.10	2.80	5.93	3.41	10.53 KWD	1.93	25.30
NIC 50	9,294.93	1.96	0.33	-2.16	0.99	2.32	28.60 KWD	1.63	16.20
Kuwait Sector									
Banking	1,747.58	0.35	0.35	-1.21	2.45	-2.58	29.36 KWD	1.14	18.20
Telecom	1,102.05	0.16	0.16	-1.03	-1.37	-6.72	3.38 KWD	1.34	8.76
Industrials	991.20	0.35	0.35	-1.02	-1.18	-8.13	3.50 KWD	0.84	18.36
Financial services	1,276.42	0.07	0.07	-1.08	4.03	1.53	3.67 KWD	0.76	22.23
Real estate	1,233.11	-0.03	-0.03	-1.36	2.12	2.02	2.67 KWD	0.61	29.50
Basic materials	855.34	0.54	0.54	-3.14	-5.74	-1.13	0.76 KWD	2.04	8.01
Health care	455.49	0.00	0.00	0.27	1.35	-1.38	0.23 KWD	0.95	6.68
Consumer services	606.93	7.39	7.39	-2.37	-1.33	26.46	0.79 KWD	0.89	13.41
Insurance	2,222.07	1.14	1.14	1.97	5.31	43.28	0.91 KWD	0.88	12.10
Consumer Disc	1,687.48	-0.51	-0.51	-1.94	8.17	13.50	0.18 KWD	1.13	38.35
Energy	1,005.83	-0.32	-0.32	0.69	-1.33	-11.65	0.21 KWD	0.68	4.45
Technology	574.00	-3.66	-3.66	-0.50	-15.07	-17.55	0.01 KWD	0.71	0.00
Utilities	500.00	-2.06	-2.06	-5.94	-5.00	1.06	0.21 KWD	1.91	15.56



What Move the GCC markets

Oil Prices

Oil prices eased on Monday after seven straight weeks of gains supported by tightening supply on OPEC+ output cuts, as concerns about China's faltering economic recovery and a stronger dollar weighed. Brent crude futures fell 29 cents, or 0.3%, to \$86.52 a barrel.

Kuwait Market

The market closed up by 0.29% at 7,168.96 value traded 39.2 million KD, Premier market value traded reached 27.0 million KD up 0.34% at 7,887.67

KSA Market

The market closed up today by 1.07% at 11,546.15

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



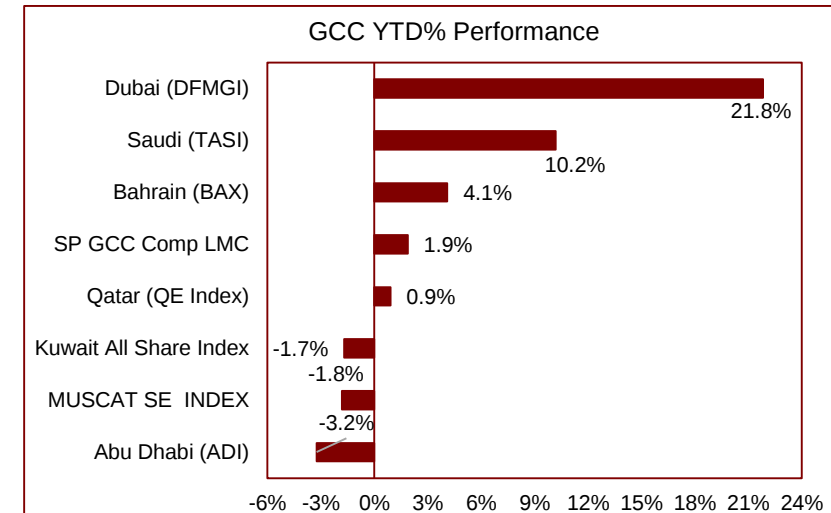
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.937	0.75	0.75	-2.60	0.21	-8.73	7.43 KWD	1.80	27.00
KFH	0.767	0.26	0.26	-2.79	2.95	2.52	11.32 KWD	1.96	32.00
Zain	0.516	0.19	0.19	-0.96	-0.39	-8.35	2.23 KWD	1.74	11.00
BOUBYAN BANK	0.628	0.64	0.64	1.29	-1.88	-16.58	2.49 KWD	2.58	34.00
Agility	0.632	0.16	0.16	0.32	1.44	-12.22	1.69 KWD	0.89	22.78
Saudi Arabia									
ARAMCO	34.55	1.62	1.62	6.64	7.13	18.40	8,361.10 SAR	5.47	16.55
SABIC	88.00	0.80	0.80	2.68	-0.23	-1.57	264.00 SAR	1.49	35.00
STC	41.55	0.36	0.36	-2.00	-4.48	13.52	207.75 SAR	2.74	16.64
AL-RAJHI BANK	72.70	0.97	0.97	-2.55	-0.41	-3.32	290.80 SAR	2.82	16.89
NCB	36.40	1.11	1.11	-5.58	-1.09	-3.42	218.40 SAR	1.27	11.39
United Arab Emirates									
ETISALAT.AD	21.84	-1.18	-1.18	-2.50	-2.50	-4.46	206.60 AED	5.10	21.10
FAB.AD	14.14	-1.12	-1.12	-3.42	3.67	-17.31	156.21 AED	1.34	11.98
EMIRATES NBD	16.80	3.07	3.07	-1.18	13.13	29.23	106.12 AED	1.08	5.46
DB ISLAMIC BK	5.69	-1.22	-1.22	-1.04	4.02	-0.18	41.20 AED	0.99	7.57
EMAAR PROPERT	6.90	0.73	0.73	2.07	7.64	17.75	60.99 AED	0.85	7.27
Qatar									
QNB	16.67	0.66	0.66	-1.83	8.11	-7.39	153.98 QAR	1.50	11.17
INDUSTRIES QAT	13.61	0.81	0.81	2.10	21.19	6.25	82.35 QAR	2.20	15.05
QA ISLAMIC BK	20.40	0.74	0.74	-3.55	15.19	9.91	48.21 QAR	1.75	12.18
MASRAF AL RAYA	2.50	0.40	0.40	-0.28	-2.34	-21.07	23.28 QAR	0.97	22.45
MESAIEED PETRO	1.93	0.21	0.21	-0.87	1.74	-9.12	24.29 QAR	1.46	18.48
OMAN									
BANK MUSCAT	0.281	0.36	0.36	0.36	1.81	2.18	2.11 OMR	0.94	8.33
OMANTEL	1.010	13.74	1.00	1.51	1.81	9.78	0.76 OMR	1.21	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	0.298	1.36	1.36	3.11	6.43	3.11	0.48 QAR	0.74	12.71
OMINVEST	0.385	1.32	1.32	-1.03	1.85	-8.33	0.26 QAR	0.72	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

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.29 %The leading sector best performance indices today are Consumer services 7.39 % Insurance 1.14 % Basic materials 0.54 % respectively.

KSA

Saudi Armco has a positive performance today by + 1.62 %, SABIC have positive performance today by + 0.80%. STC has a positive performance today by + 0.36 %, Al Rajhi Bank has a positive performance today by + 0.97 %

U.A.E

ETISALAT .AD have negative performance today by -1.18 %, FAB.AD have negative performance today by -1.12 %



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