



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, July 13th 2023





Market Watch

Thursday, July 13, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets		%	%	%	%	%			
Saudi (TASI)	11,707.87	-0.16	0.95	2.17	2.17	11.73	10,974 SAR	2.06	19.27
Qatar (QE Index)	10,217.28	0.93	-0.28	1.42	1.42	-4.34	542 QAR	1.39	11.39
Dubai (DFMGI)	4,009.83	0.44	1.07	5.61	5.61	20.04	579 AED	1.56	22.86
Abu Dhabi (ADI)	9,671.89	0.06	0.24	0.80	0.80	-5.72	1,435 AED	1.84	21.30
Bahrain (BAX)	1,974.61	0.24	0.78	0.85	0.85	4.19	9 BHD	6.79	18.00
MUSCAT SE INDEX	4,796.66	-0.09	0.14	0.60	0.60	-1.25	5 OMR	1.01	13.25
SP GCC Comp LMC	183.28	0.05	0.90	2.24	2.24	2.38			
SP UAE PRICE INDEX	138.86	0.30	0.31	2.73	2.73	0.38			
Developed Markets									
MSCI World Index	3,017.94	1.09	3.25	1.79	1.79	16.02			
U.S. (S&P 500)	4,505.42	0.85	2.23	1.34	1.34	17.46			
U.K. (FTSE 100)	7,434.57	0.32	2.19	-1.21	-1.21	-0.15			
Japan (Topix)	2,239.10	0.97	-1.50	-1.99	-1.99	18.57			
Emerging Markets									
MSCI EM Index	1,028.49	1.49	3.64	3.14	3.14	6.71			
China (SSE Composite)	3,237.70	1.26	0.96	1.07	1.07	4.77			
India (Sensex)	66,060.90	0.25	-0.34	1.30	1.30	7.75			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait		%	%	%	%	%			
Kuwait All Share Index	7,313.71	0.33	1.83	4.04	4.04	0.30	47.05 KWD	1.79	18.85
Kuwait Premier Index	8,141.51	0.20	1.89	4.25	4.25	0.32	36.76 KWD	1.73	18.80
Kuwait Main Index	5,636.91	0.90	1.59	3.17	3.17	0.72	10.29 KWD	1.98	19.05
NIC 50	9,116.27	0.00	1.88	4.24	4.24	0.36	28.60 KWD	1.71	17.80
Kuwait Sector									
Banking	1,784.31	0.19	2.16	4.60	4.60	-0.54	29.85 KWD	1.26	19.80
Telecom	1,148.31	0.46	2.06	2.77	2.77	-2.81	3.52 KWD	1.41	9.16
Industrials	1,034.72	0.60	1.77	3.16	3.16	-4.09	3.64 KWD	0.81	20.60
Financial services	1,283.20	1.29	2.02	4.58	4.58	2.06	3.70 KWD	0.79	19.56
Real estate	1,231.23	-0.01	-0.33	1.96	1.96	1.86	2.66 KWD	0.62	22.52
Basic materials	902.37	0.02	-1.01	-0.55	-0.55	4.31	0.79 KWD	1.42	8.84
Health care	450.35	-0.73	-0.73	0.20	0.20	-2.49	0.22 KWD	0.92	6.44
Consumer services	613.77	-0.66	-0.71	-0.21	-0.21	27.88	0.84 KWD	0.87	14.16
Insurance	2,098.08	0.23	0.16	-0.57	-0.57	35.29	0.86 KWD	0.80	10.19
Consumer Disc	1,717.37	1.06	3.06	10.08	10.08	15.51	0.19 KWD	1.11	0.00
Energy	1,000.90	-2.07	-1.31	-1.81	-1.81	-12.09	0.21 KWD	0.75	4.45
Technology	597.28	-3.41	-10.57	-11.63	-11.63	-14.21	0.01 KWD	0.74	0.00
Utilities	531.58	-0.49	-0.98	1.00	1.00	7.45	0.22 KWD	2.03	16.54

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices fell more than a dollar a barrel on Friday as the dollar strengthened and oil traders booked profits from a strong rally, with crude benchmarks recording their third-straight weekly gain. Brent crude futures settled at \$79.87 a dollar, down \$1.49, or 1.8%, while the U.S. West Texas Intermediate crude futures fell \$1.47, or 1.9%, to settle at \$75.42 a barrel.

Kuwait Market

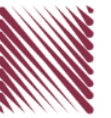
The market closed up today by 0.33% at 7,313.71 value traded 53.9 million KD, Premier market value traded reached 41.6 million KD up + 0.20% at 8,141.51

KSA Market

The market closed down today by - 0.16% at 11,707.87

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



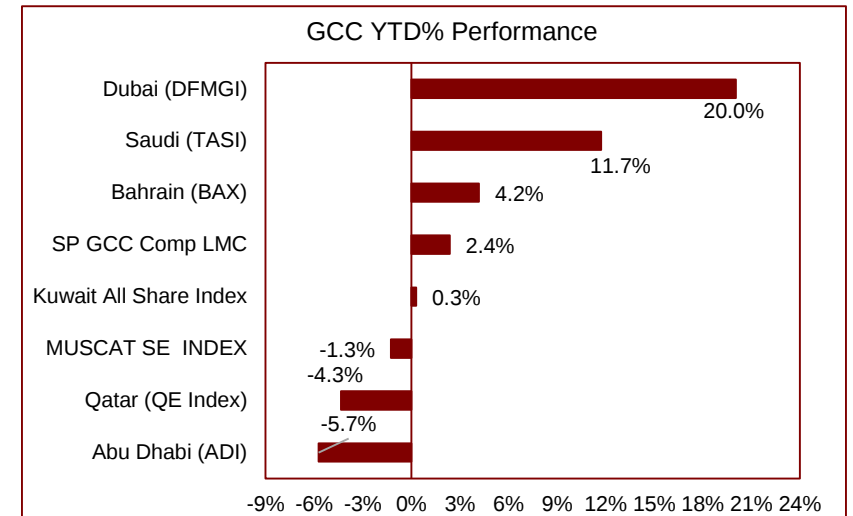
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.979	0.00	2.30	4.71	4.71	-4.64	7.75 KWD	1.97	27.00
KFH	0.781	0.13	2.09	4.83	4.83	4.39	11.53 KWD	1.99	32.00
Zain	0.533	0.00	1.91	2.90	2.90	-5.33	2.30 KWD	1.80	11.36
BOUBYAN BANK	0.655	0.00	0.15	2.34	2.34	-12.99	2.59 KWD	2.92	34.00
Agility	0.658	1.08	4.28	5.62	5.62	-8.61	1.76 KWD	0.92	23.72
Saudi Arabia									
ARAMCO	32.15	-0.16	-0.46	-0.31	-0.31	10.17	7,780.30 SAR	5.21	13.86
SABIC	88.40	-0.11	-0.23	0.23	0.23	-1.12	265.22 SAR	1.42	35.00
STC	45.00	0.00	1.58	3.45	3.45	22.95	225.00 SAR	3.00	18.35
AL-RAJHI BANK	71.80	-0.69	-0.97	-1.64	-1.64	-4.52	287.22 SAR	2.89	16.85
NCB	37.70	0.13	2.31	2.45	2.45	0.03	226.20 SAR	1.31	12.15
United Arab Emirates									
ETISALAT.AD	21.86	-0.55	-1.53	-2.41	-2.41	-4.37	206.60 AED	5.10	21.10
FAB.AD	13.72	0.29	-0.44	0.59	0.59	-19.77	152.90 AED	1.36	12.92
EMIRATES NBD	16.20	0.00	0.31	9.09	9.09	24.62	102.96 AED	1.08	6.12
DB ISLAMIC BK	5.65	1.62	2.17	3.29	3.29	-0.88	41.06 AED	1.02	7.86
EMAAR PROPERT	6.88	0.73	1.33	7.33	7.33	17.41	60.55 AED	0.85	7.25
Qatar									
QNB	15.64	0.77	-3.46	1.43	1.43	-13.11	144.35 QAR	1.40	10.48
INDUSTRIES QAT	11.92	3.65	1.88	6.14	6.14	-6.95	72.06 QAR	1.97	9.91
QA ISLAMIC BK	17.81	0.62	-0.50	0.56	0.56	-4.04	42.05 QAR	1.58	10.88
MASRAF AL RAYA	2.51	-0.04	-0.87	-2.11	-2.11	-20.88	23.32 QAR	0.99	19.82
MESAIEED PETRO	1.92	0.26	-0.21	0.84	0.84	-9.92	24.05 QAR	1.48	15.11
OMAN									
BANK MUSCAT	0.279	-0.71	-0.36	1.09	1.09	1.45	2.09 OMR	0.96	8.33
OMANTEL	0.993	11.82	2.37	0.10	0.10	7.93	0.74 OMR	1.22	7.69
BANK DHOFAR	0.175	-1.13	1.16	1.16	1.16	0.00	0.52 QAR	0.74	14.93
NAT BANK OF OMAN	0.290	1.40	1.75	3.57	3.57	0.35	0.47 QAR	0.73	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
05-July 23	24.3%	15.55%	0.066%	1.72%	0.24%	5.22%	17.6%	13.9%	6.23%	4.48%
12-July 23	24.34%	15.45%	0.066%	1.72%	0.24%	5.23%	17.58%	13.82%	6.21%	4.57%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is up today by + 0.33 %The leading sector best performance indices today are Financial services 1.29 % Consumer Disc 1.06 % Industrials 0.6 % respectively

KSA

Saudi Armco have negative performance today by -0.16 %, SABIC have negative performance today by -0.11%. STC flat performance today 0 %, Al Rajhi Bank have negative performance today by -0.69 %

U.A.E

ETISALAT .AD have negative performance today by -0.55 %, FAB.AD has a positive performance today by + 0.29 %



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