



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Wednesday, September 13th 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)	11,122.23	-0.31	-0.83	-3.21	-2.94	6.14	2.03	18.09	3.46	11,070.25
Qatar (QE Index)	10,369.35	-0.16	1.29	1.71	2.93	-2.92	1.25	12.47	4.74	527.86
Dubai (DFMGI)	4,050.64	-0.25	-0.41	-0.79	6.82	21.42	1.47	9.90	4.41	579.89
Abu Dhabi (ADI)	9,755.10	0.06	0.67	-0.56	2.14	-4.47	2.45	15.39	2.24	2,736.67
Bahrain (BAX)	1,929.75	-0.24	-0.62	-1.15	-1.44	1.82	0.76	9.34	6.03	7.02
Muscat SE INDEX	4,710.67	0.32	0.44	-1.84	-1.21	-3.02	0.86	10.30	4.73	6.60
SP GCC Comp LMC	175.72	-0.29	-0.22	-1.81	-1.84	-1.71	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	139.25	0.00	0.86	0.39	3.65	1.27				
Developed Markets										
MSCI World Index	2,956.84	0.03	0.27	-0.98	-0.33	13.61				
U.S. (S&P 500)	4,467.44	0.12	0.22	-0.89	0.38	16.35	3.96	22.70	2.03	39,333.59
U.K. (FTSE 100)	7,525.99	-0.02	0.64	1.17	-0.07	1.00	1.57	10.53	3.92	2,028.44
Japan (topix)	2,378.64	-0.05	0.83	2.00	3.93	25.74	1.39	14.16	2.15	859,013.86
Emerging Markets										
MSCI EM Index	974.56	-0.12	0.07	-0.59	-1.51	1.90				
China (SSE Composite)	3,123.07	-0.45	0.20	0.10	-2.47	1.09	1.36	12.00		44,025.04
India (Sensex)	67,466.99	0.37	1.30	4.07	4.25	10.89	4.37	23.26	1.19	131,285.97
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,036.17	0.40	0.37	0.43	0.09	-3.51	1.48	15.69	3.24	45.47
Kuwait Premier Index	7,711.15	0.32	0.26	0.21	-1.26	-4.98	1.64	17.34	3.07	36.42
Kuwait Main Index	5,765.60	0.71	0.81	1.28	5.53	3.02	1.05	11.05	3.92	9.05
Kuwait Sector										
Banking	1,705.11	0.65	0.29	0.40	-0.04	-4.95	1.71	17.73	2.72	28.73
Telecom	1,114.91	-0.03	-0.29	0.94	-0.22	-5.63	1.69	10.38	6.33	3.42
Industrials	943.31	0.41	-0.20	0.28	-5.96	-12.57	1.05	16.39	2.98	3.30
Financial Services	1,282.77	-0.06	0.97	1.02	4.55	2.03	1.02	14.91	3.87	4.08
Real Estate	1,231.90	-0.08	1.79	1.39	2.02	1.92	0.96	15.19	2.04	2.64
Basic Materials	881.38	0.02	1.19	0.10	-2.87	1.88	1.53	9.83	8.87	0.50
Health Care	482.72	0.00	2.77	0.00	7.40	4.52	1.75	12.41	1.72	0.24
Consumer Staples	623.06	0.56	2.48	2.37	1.30	29.82	1.42	78.32	1.99	0.19
Insurance	2,210.67	-0.06	-0.41	-1.83	4.77	42.55	1.25	7.43	4.22	0.89
Consumer Discretionary	1,561.67	-0.84	0.13	-2.40	0.10	5.03				
Energy	987.24	1.15	-0.93	-0.83	-3.15	-13.29	0.77	9.88	5.20	0.20
Technology	560.17	3.91	-0.52	-3.75	-17.12	-19.54	0.67			0.01
Utilities	513.16	0.52	1.56	0.52	-2.50	3.72				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices edged higher on Thursday, after dipping slightly in the previous session, as markets refocused on expectations of tight crude supply for the rest of 2023. International benchmark Brent futures climbed 17 cents to \$92.05 a barrel.

Kuwait Market

The market closed up by 0.40% at 7,036.17 value traded 32.3 million KD, Premier market value reached 21.4 million KD up 0.32% at 7,711.15

KSA Market

The market closed down today by - 0.31% at 11,122.23

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



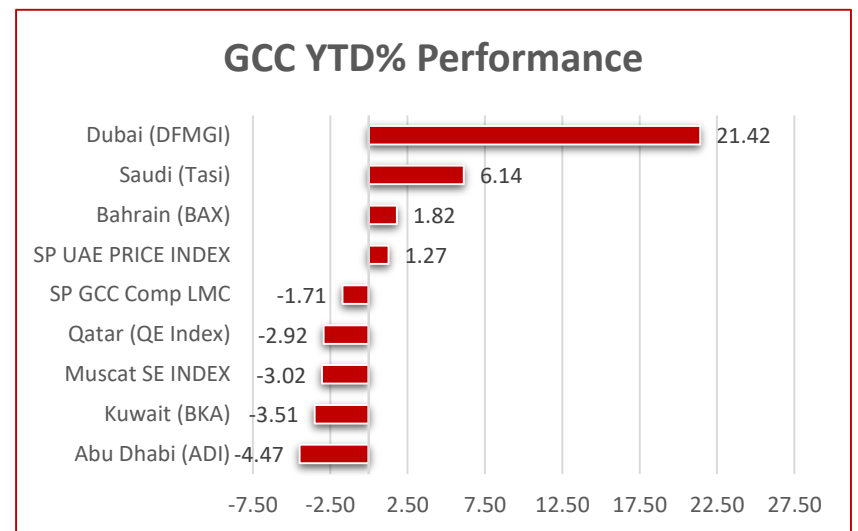
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.917	-0.11	-0.22	-0.33	-1.93	-10.68	13.86	1.76	3.69	7.27
KFH	0.749	0.81	0.00	0.54	0.54	0.11	19.51	1.91	2.25	11.06
ZAIN	0.507	0.20	0.60	-0.59	-2.12	-9.95	10.44	1.77	6.90	2.19
BOUBYAN BANK	0.618	0.49	0.49	1.31	-3.44	-17.91	40.90	2.54	0.92	2.45
AGILITY	0.573	1.06	-0.52	-0.35	-8.03	-20.42	21.27	0.77	0.00	1.53
Saudi Arabia										
ARAMCO	33.45	0.45	-2.05	-4.15	3.72	14.63	15.94	5.29	4.04	8,099.65
SABIC	85.70	-3.49	-3.60	-3.05	-2.83	-4.14	64.86	1.45	4.43	257.25
STC	38.65	-0.90	-1.15	-2.89	-11.15	5.60	15.57	2.55	4.14	193.36
AL-RAJHI BANK	70.80	-0.14	0.00	-1.94	-3.01	-5.85	16.61	2.74	2.51	283.37
NCB	34.25	-0.87	-2.42	-4.20	-6.93	-9.13	10.82	1.20	3.79	205.62
Abu Dhabi										
ETISALAT.AD	19.70	0.31	1.76	-0.71	-12.05	-13.82	17.39	4.10	4.06	171.35
FAB.AD	13.60	1.34	1.80	-0.58	-0.29	-20.47	11.52	1.29	3.82	150.26
EMIRATES NBD	17.05	-0.29	1.79	4.28	14.81	31.15	5.54	1.09	3.52	107.71
DB ISLAMIC DB	5.62	-0.53	0.00	-0.35	2.74	-1.40	7.48	0.97	5.34	40.70
EMAR.DU	7.06	-0.98	0.86	0.00	10.14	20.48	7.90	0.88	3.54	62.41
Qatar										
QNB	15.300	-0.33	0.79	-1.92	-0.78	-15.00	10.25	1.37	3.92	141.43
INDUSTREIS QAT	13.950	-1.06	3.18	12.86	24.22	8.90	16.16	2.25	7.89	84.46
QA ISLAMIC BK	18.930	-0.37	-0.63	-2.02	6.89	1.99	11.30	1.62	3.30	44.76
MASRAF AL RAYA	2.220	-0.67	4.82	0.00	-13.38	-29.99	19.91	0.86	4.50	20.66
MESAIEED PETRO	1.835	-0.33	-1.87	-0.27	-3.42	-13.73	17.55	1.39	5.99	23.07
Oman										
BANK MUSCAT	0.285	0.00	1.42	0.00	3.26	3.64	11.22	0.96	5.26	2.14
OMANTEL	1.008	0.00	0.30	-2.14	1.61	9.57	32.60	1.20	3.22	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	0.400	0.00	0.50	0.50	5.82	-4.76	5.88	0.89	3.75	0.27

Foreign Holding										
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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Leading Sector, Security Performance

Kuwait

The market is up today by + 0.4 %The leading sector best performance indices today are Technology 3.91 % Energy 1.15 % Banking 0.65 % respectively.

KSA

Saudi Armco have positive performance today by + 0.45 %, SABIC have negative performance today by -3.49 % . STC has a negative performance today by -0.90 %, Al Rajhi Bank have negative performance today by 0.14 %

U.A.E

ETISALAT .AD has a positive performance today by + 0.31 %, FAB.AD has a positive performance today by + 1.34 %,



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