

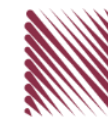


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Monday, August 14th 2023



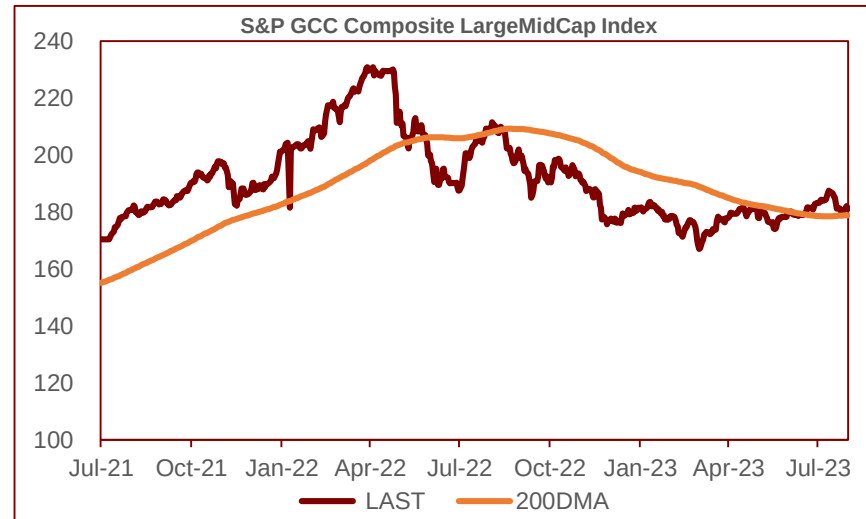


Market Watch

Monday, August 14, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	11,493.82	-0.45	0.61	-1.70	0.30	9.69	11,446 SAR	1.99	18.86
Qatar (QE Index)	10,708.35	-0.65	-0.25	-2.32	6.29	0.26	565 QAR	1.39	12.70
Dubai (DFMGI)	4,058.79	-0.14	0.25	-0.01	7.04	21.66	581 AED	1.59	21.31
Abu Dhabi (ADI)	9,848.32	-0.32	-0.56	0.63	3.12	-3.55	1,435 AED	1.84	20.46
Bahrain (BAX)	1,963.84	-0.46	-0.43	-1.05	0.30	3.62	9 BHD	6.49	18.00
MUSCAT SE INDEX	4,762.42	-0.14	0.11	-0.29	-0.12	-1.96	5 OMR	0.99	13.25
SP GCC Comp LMC	181.01	-0.62	0.11	-2.38	1.11	1.25			
SP UAE PRICE INDEX	140.73	-0.43	-0.31	-0.41	4.76	2.35			
Developed Markets									
MSCI World Index	2,976.86	0.14	-0.27	-2.85	0.34	14.38			
U.S. (S&P 500)	4,489.72	0.58	0.47	-2.16	0.88	16.94			
U.K. (FTSE 100)	7,507.15	-0.23	-1.46	-2.50	-0.32	0.74			
Japan (Topix)	2,280.89	-0.98	-0.98	-1.79	-0.34	20.57			
Emerging Markets									
MSCI EM Index	986.28	-1.15	-2.19	-5.79	-0.32	3.13			
China (SSE Composite)	3,178.43	-0.34	-2.34	-3.42	-0.74	2.89			
India (Sensex)	65,401.92	0.12	-0.44	-1.69	1.06	7.50			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,133.91	-0.49	-0.20	-1.65	1.48	-2.17	46.08 KWD	1.70	18.87
Kuwait Premier Index	7,833.52	-0.69	-0.35	-2.82	0.31	-3.48	35.53 KWD	1.64	17.08
Kuwait Main Index	5,803.58	0.27	0.38	3.08	6.22	3.69	10.55 KWD	1.92	24.95
NIC 50	9,294.93	1.96	-0.36	-2.83	0.30	2.32	28.60 KWD	1.62	16.08
Kuwait Sector									
Banking	1,735.41	-0.70	-0.34	-1.90	1.74	-3.26	29.20 KWD	1.15	18.08
Telecom	1,109.27	0.66	0.82	-0.38	-0.73	-6.11	3.41 KWD	1.36	8.90
Industrials	984.92	-0.63	-0.29	-1.64	-1.81	-8.71	3.48 KWD	0.83	18.50
Financial services	1,265.26	-0.87	-0.80	-1.94	3.12	0.64	3.65 KWD	0.76	22.44
Real estate	1,232.20	-0.07	-0.11	-1.43	2.04	1.94	2.67 KWD	0.62	29.24
Basic materials	860.47	0.60	1.15	-2.56	-5.17	-0.54	0.77 KWD	1.97	8.01
Health care	478.19	4.98	4.98	5.26	6.40	3.54	0.24 KWD	0.95	6.68
Consumer services	595.97	-1.81	5.45	-4.13	-3.11	24.17	0.79 KWD	0.89	13.29
Insurance	2,232.32	0.46	1.60	2.44	5.80	43.94	0.91 KWD	0.90	12.10
Consumer Disc	1,675.70	-0.70	-1.20	-2.63	7.41	12.70	0.18 KWD	1.11	37.61
Energy	993.43	-1.23	-1.55	-0.55	-2.54	-12.74	0.21 KWD	0.68	4.41
Technology	589.27	2.66	-1.10	2.14	-12.81	-15.36	0.01 KWD	0.73	0.00
Utilities	507.89	1.58	-0.52	-4.46	-3.50	2.66	0.21 KWD	1.94	15.81



What Move the GCC markets

Oil Prices

Oil prices finished down on Monday on worries about China's faltering economic recovery and a stronger dollar were taking the momentum out of seven weeks of gains on tight supply. U.S. West Texas Intermediate crude settled down 68 cents, or 0.82%, at \$82.51 a barrel.

Kuwait Market

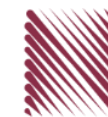
The market closed down by -0.49% at 7,133.91 value traded 33.9 million KD, Premier market value traded reached 23.4 million KD down -0.69% at 7,833.52

KSA Market

The market closed down today by -0.45% at 11,493.82

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



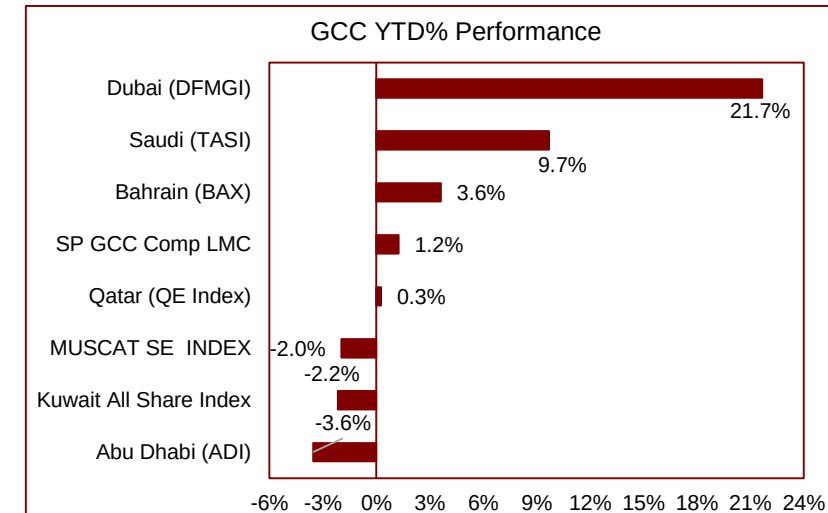
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
		%	%	%	%	%			
Blue Chip Watch									
Kuwait									
NBK	0.930	-0.75	0.00	-3.33	-0.53	-9.42	7.38 KWD	1.79	27.00
KFH	0.759	-1.04	-0.78	-3.80	1.88	1.45	11.21 KWD	1.94	32.00
Zain	0.516	0.00	0.19	-0.96	-0.39	-8.35	2.23 KWD	1.74	11.00
BOUBYAN BANK	0.626	-0.32	0.32	0.97	-2.19	-16.85	2.48 KWD	2.57	34.00
Agility	0.623	-1.42	-1.27	-1.11	0.00	-13.47	1.67 KWD	0.87	22.46
Saudi Arabia									
ARAMCO	34.60	0.14	1.76	6.79	7.29	18.57	8,372.31 SAR	5.48	16.81
SABIC	86.70	-1.48	-0.69	1.17	-1.70	-3.02	260.07 SAR	1.47	35.00
STC	41.50	-0.12	0.24	-2.12	-4.60	13.39	207.48 SAR	2.74	16.70
AL-RAJHI BANK	72.60	-0.14	0.83	-2.68	-0.55	-3.46	290.37 SAR	2.81	17.05
NCB	35.90	-1.37	-0.28	-6.87	-2.45	-4.75	215.38 SAR	1.26	11.52
United Arab Emirates									
ETISALAT.AD	21.40	-2.01	-3.17	-4.46	-4.46	-6.39	206.60 AED	5.10	21.10
FAB.AD	14.04	-0.71	-1.82	-4.10	2.93	-17.89	155.12 AED	1.33	11.90
EMIRATES NBD	17.00	1.19	4.29	0.00	14.48	30.77	107.39 AED	1.09	5.52
DB ISLAMIC BK	5.68	-0.18	-1.39	-1.22	3.84	-0.35	41.13 AED	0.98	7.56
EMAAR PROPERT	6.82	-1.16	-0.44	0.89	6.40	16.38	60.28 AED	0.84	7.19
Qatar									
QNB	16.50	-1.02	-0.36	-2.83	7.00	-8.33	152.28 QAR	1.48	11.05
INDUSTRIES QAT	13.35	-1.91	-1.11	0.15	18.88	4.22	80.70 QAR	2.16	14.76
QA ISLAMIC BK	20.20	-0.98	-0.25	-4.49	14.06	8.84	47.69 QAR	1.73	12.06
MASRAF AL RAYA	2.49	-0.36	0.04	-0.64	-2.69	-21.35	23.18 QAR	0.97	22.37
MESAIEED PETRO	1.94	0.36	0.57	-0.51	2.11	-8.79	24.35 QAR	1.47	18.55
OMAN									
BANK MUSCAT	0.281	0.00	0.36	0.36	1.81	2.18	2.11 OMR	0.94	8.33
OMANTEL	1.000	12.61	0.00	0.50	0.81	8.70	0.75 OMR	1.20	7.69
BANK DHOFAR	0.175	0.00	0.00	0.57	1.16	0.00	0.53 QAR	0.73	14.93
NAT BANK OF OMAN	0.298	0.00	1.36	3.11	6.43	3.11	0.49 QAR	0.74	12.71
OMINVEST	0.380	-1.30	0.00	-2.31	0.53	-9.52	0.25 QAR	0.71	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 down today by -0.49 %The leading sector bottom performance indices today are Consumer services -1.81 % Energy -1.23 % Financial services -0.87 % respectively.

KSA

Saudi Armco has a positive performance today by + 0.14 %, SABIC have negative performance today by -1.47%. STC have negative performance today by -0.12 %, Al Rajhi Bank have negative performance today by -0.14 %

U.A.E

ETISALAT .AD have negative performance today by -2.01 %, FAB.AD have negative performance today by -0.71 %



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