



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Thursday, September 14th 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)	11,154.54	0.29	-0.54	-2.93	-2.66	6.45	2.03	18.15	3.45	11,189.47
Qatar (QE Index)	10,319.28	-0.48	0.80	1.22	2.43	-3.39	1.24	12.41	4.77	525.71
Dubai (DFMGI)	4,043.40	0.23	-0.59	-0.97	6.63	21.20	1.47	9.89	4.41	579.67
Abu Dhabi (ADI)	9,880.46	0.86	1.96	0.72	3.46	-3.24	2.48	15.58	2.21	2,756.93
Bahrain (BAX)	1,931.48	0.09	-0.54	-1.06	-1.35	1.91	0.76	9.35	6.03	7.02
Muscat SE INDEX	4,725.90	0.32	0.77	-1.52	-0.89	-2.71	0.86	10.33	4.72	6.62
SP GCC Comp LMC	176.15	0.15	0.02	-1.57	-1.60	-1.47	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	140.29	0.71	1.61	1.14	4.42	2.03				
Developed Markets										
MSCI World Index	2,960.98	-0.73	0.41	-0.84	-0.19	13.77				
U.S. (S&P 500)	4,450.32	-1.22	-0.16	-1.27	0.00	15.91	3.95	22.63	2.04	39,244.49
U.K. (FTSE 100)	7,711.38	0.50	3.12	3.66	2.39	3.48	1.60	10.78	3.83	2,078.30
Japan (topix)	2,428.38	0.95	2.94	4.13	6.11	28.37	1.41	14.45	2.11	876,893.93
Emerging Markets										
MSCI EM Index	984.99	0.29	1.14	0.48	-0.45	2.99				
China (SSE Composite)	3,117.74	-0.28	0.03	-0.07	-2.63	0.92	1.36	12.00		44,025.04
India (Sensex)	67,838.63	0.47	1.86	4.64	4.82	11.50	4.39	23.39	1.19	131,964.90
Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,029.12	-0.10	0.27	0.33	-0.01	-3.61	1.48	15.74	3.23	45.60
Kuwait Premier Index	7,705.16	-0.08	0.18	0.13	-1.33	-5.06	1.64	17.38	3.07	36.50
Kuwait Main Index	5,755.00	-0.18	0.62	1.10	5.33	2.83	1.05	11.12	3.90	9.10
Kuwait Sector										
Banking	1,708.54	0.20	0.49	0.60	0.16	-4.76	1.73	17.86	2.70	28.95
Telecom	1,109.80	-0.46	-0.75	0.47	-0.68	-6.07	1.68	10.33	6.36	3.41
Industrials	939.39	-0.42	-0.61	-0.14	-6.35	-12.93	1.05	16.39	2.98	3.30
Financial Services	1,278.47	-0.34	0.63	0.68	4.20	1.69	1.02	14.85	3.88	4.06
Real Estate	1,220.78	-0.90	0.87	0.48	1.10	1.00	0.95	15.03	2.06	2.62
Basic Materials	860.19	-2.40	-1.24	-2.30	-5.20	-0.57	1.50	9.60	9.09	0.49
Health Care	482.72	0.00	2.77	0.00	7.40	4.52	1.75	12.41	1.72	0.24
Consumer Staples	619.59	-0.56	1.91	1.80	0.73	29.09	1.42	78.61	1.99	0.19
Insurance	2,210.13	-0.02	-0.43	-1.86	4.75	42.51	1.25	7.42	4.22	0.89
Consumer Discretionary	1,541.95	-1.26	-1.13	-3.63	-1.16	3.71				
Energy	984.70	-0.26	-1.18	-1.09	-3.40	-13.51	0.78	9.99	5.16	0.21
Technology	560.17	0.00	-0.52	-3.75	-17.12	-19.54	0.69			0.01
Utilities	513.16	0.00	1.56	0.52	-2.50	3.72				

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices hit a 10-month high on Thursday and posted a third weekly gain as supply tightness spearheaded by Saudi Arabian production cuts combined with optimism around Chinese demand to lift crude. Brent crude futures rose 23 cents, or 0.3%, to settle at \$93.70 a barrel

Kuwait Market

The market closed down by - 0.10% at 7,029.12 value traded 54.4 million KD, Premier market value reached 43.4 million KD down by - 0.08% at 7,705.16

KSA Market

The market closed up today by + 0.29% at 11,154.54

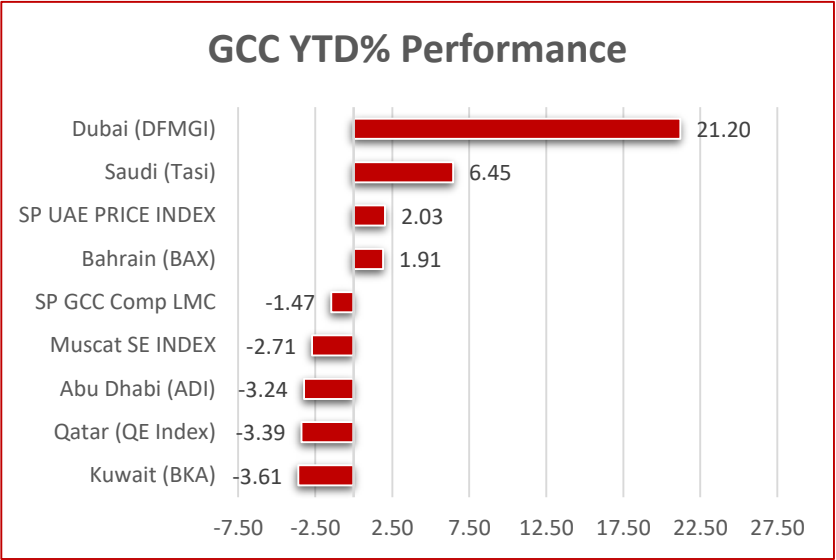


Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.925	0.87	0.65	0.54	-1.07	-9.90	13.98	1.78	3.66	7.34
KFH	0.747	-0.27	-0.27	0.27	0.27	-0.16	19.45	1.91	2.25	11.03
ZAIN	0.505	-0.39	0.20	-0.98	-2.51	-10.30	10.40	1.77	6.93	2.19
BOUBYAN BANK	0.622	0.65	1.14	1.97	-2.81	-17.38	41.16	2.55	0.91	2.46
AGILITY	0.568	-0.87	-1.39	-1.22	-8.83	-21.11	21.08	0.77	0.00	1.52
Saudi Arabia										
ARAMCO	33.95	1.49	-0.59	-2.72	5.27	16.34	16.17	5.37	3.98	8,215.90
SABIC	85.50	-0.23	-3.82	-3.28	-3.06	-4.36	64.71	1.45	4.44	256.50
STC	38.40	-0.65	-1.79	-3.52	-11.72	4.92	15.46	2.54	4.17	192.00
AL-RAJHI BANK	71.40	0.85	0.85	-1.11	-2.19	-5.05	16.75	2.77	2.49	285.60
NCB	34.05	-0.58	-2.99	-4.76	-7.47	-9.66	10.75	1.19	3.81	204.30
Abu Dhabi										
ETISALAT.AD	20.12	0.89	4.86	2.32	-9.37	-11.20	17.92	4.23	3.94	176.55
FAB.AD	13.68	0.73	3.14	0.73	1.03	-19.42	11.68	1.31	3.77	152.24
EMIRATES NBD	16.90	2.66	3.58	6.12	16.84	33.46	5.63	1.11	3.46	109.59
DB ISLAMIC DB	5.70	-0.35	1.07	0.71	3.84	-0.35	7.56	0.98	5.28	41.13
EMAR.DU	7.04	0.14	0.71	-0.14	9.98	20.31	7.89	0.88	3.55	62.31
Qatar										
QNB	15.350	0.33	1.12	-1.60	-0.45	-14.72	10.28	1.38	3.91	141.78
INDUSTREIS QAT	13.710	-1.72	1.41	10.92	22.08	7.03	15.89	2.22	8.02	82.95
QA ISLAMIC BK	18.800	-0.69	-1.31	-2.69	6.15	1.29	11.23	1.61	3.32	44.42
MASRAF AL RAYA	2.225	0.23	5.05	0.23	-13.19	-29.83	19.95	0.86	4.49	20.69
MESAIEED PETRO	1.828	-0.38	-2.25	-0.65	-3.79	-14.06	17.48	1.38	6.02	22.97
Oman										
BANK MUSCAT	0.285	0.00	1.42	0.00	3.26	3.64	11.22	0.96	5.26	2.14
OMANTEL	1.009	0.10	0.40	-2.04	1.71	9.67	32.63	1.21	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	0.300	1.69	2.04	1.35	7.14	3.81	10.97	0.75	2.47	0.49
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
6-September-23	24.37%	14.52%	0.07%	2.21%	0.24%	5.10%	17.55%	13.48%	6.06%	4.86%
13-September-23	24.30%	14.41%	0.07%	2.11%	0.24%	5.11%	17.54%	13.46%	6.06%	4.86%

End of Report
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Sources, Bursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait
The market is down today by - 0.10 %, The leading sector bottom performance indices today are Basic Material - 2.40 % Consumer Discretionary - 1.26 % Real Estate - 0.90 % respectively.

KSA
Saudi Armco has a positive performance today by + 1.49 %, SABIC has a negative performance today by -0.23 %, STC has a negative performance today by -0.23 % , Al Rajhi Bank has a positive performance today by 0.85 %

U.A.E
ETISALAT .AD has a positive performance today by + 0.89 %, FAB.AD has a positive performance today by + 0.73 %,



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