

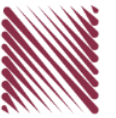


شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, August 15th 2023



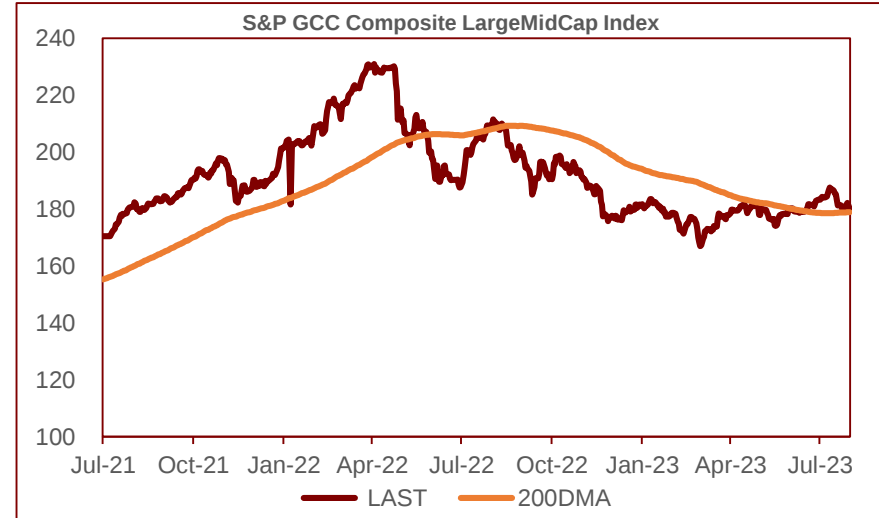


Market Watch

Tuesday, August 15, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	11,412.88	-0.70	-0.10	-2.39	-0.40	8.92	11,378 SAR	1.97	18.80
Qatar (QE Index)	10,673.66	-0.32	-0.58	-2.64	5.95	-0.07	564 QAR	1.39	12.70
Dubai (DFMGI)	4,051.19	-0.19	0.06	-0.20	6.84	21.44	581 AED	1.59	21.31
Abu Dhabi (ADI)	9,807.19	-0.42	-0.98	0.20	2.69	-3.96	1,435 AED	1.82	20.47
Bahrain (BAX)	1,959.43	-0.22	-0.65	-1.27	0.08	3.39	9 BHD	6.07	18.00
MUSCAT SE INDEX	4,763.26	0.02	0.13	-0.27	-0.10	-1.94	5 OMR	0.99	13.25
SP GCC Comp LMC	180.15	-0.47	-0.36	-2.84	0.64	0.77			
SP UAE PRICE INDEX	140.13	-0.43	-0.74	-0.84	4.31	1.92			
Developed Markets									
MSCI World Index	2,948.22	-0.96	-1.23	-3.79	-0.62	13.28			
U.S. (S&P 500)	4,437.86	-1.16	-0.69	-3.29	-0.28	15.58			
U.K. (FTSE 100)	7,389.64	-1.57	-3.01	-4.02	-1.88	-0.83			
Japan (Topix)	2,290.31	0.41	-0.57	-1.39	0.07	21.07			
Emerging Markets									
MSCI EM Index	981.80	-0.45	-2.63	-6.22	-0.78	2.66			
China (SSE Composite)	3,176.18	-0.07	-2.41	-3.49	-0.81	2.81			
India (Sensex)	65,401.92	0.00	-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	7,123.88	-0.14	-0.34	-1.79	1.34	-2.31	46.01 KWD	1.71	21.65
Kuwait Premier Index	7,826.92	-0.08	-0.43	-2.90	0.23	-3.56	35.50 KWD	1.65	20.60
Kuwait Main Index	5,782.94	-0.36	0.02	2.72	5.84	3.33	10.51 KWD	1.89	25.21
NIC 50	9,294.93	1.96	-0.44	-2.91	0.22	2.32	28.60 KWD	1.63	19.60
Kuwait Sector									
Banking	1,733.87	-0.09	-0.43	-1.99	1.65	-3.35	29.16 KWD	1.16	21.60
Telecom	1,102.50	-0.61	0.20	-0.99	-1.33	-6.68	3.38 KWD	1.34	8.80
Industrials	982.66	-0.23	-0.52	-1.87	-2.03	-8.92	3.48 KWD	0.83	18.48
Financial services	1,265.47	0.02	-0.79	-1.93	3.14	0.65	3.64 KWD	0.76	31.42
Real estate	1,239.46	0.59	0.48	-0.85	2.65	2.54	2.68 KWD	0.62	29.34
Basic materials	854.19	-0.73	0.41	-3.27	-5.86	-1.26	0.76 KWD	1.99	9.69
Health care	467.90	-2.15	2.72	3.00	4.11	1.31	0.23 KWD	0.89	6.21
Consumer services	598.74	0.46	5.94	-3.69	-2.66	24.75	0.78 KWD	0.91	13.49
Insurance	2,232.26	0.00	1.60	2.44	5.79	43.94	0.91 KWD	0.90	12.10
Consumer Disc	1,657.55	-1.08	-2.27	-3.68	6.25	11.48	0.18 KWD	1.13	37.61
Energy	972.66	-2.09	-3.61	-2.63	-4.58	-14.57	0.20 KWD	0.67	4.41
Technology	578.36	-1.85	-2.93	0.25	-14.42	-16.93	0.01 KWD	0.72	0.00
Utilities	507.89	0.00	-0.52	-4.46	-3.50	2.66	0.21 KWD	1.94	15.81



What Move the GCC markets

Oil Prices

Oil prices held steady in early trading on Wednesday after a 1% drop in the previous session, as markets weighed weak economic data from China, the world's biggest oil importer, against tightening U.S. crude supplies. Brent crude futures rose 3 cents to \$84.92 a barrel.

Kuwait Market

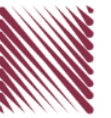
The market closed down by -0.14% at 7,123.88 value traded 25.8 million KD, Premier market value reached 18.6 million KD down -0.08% at 7,826.92

KSA Market

The market closed down today by -0.70% at 11,412.88

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



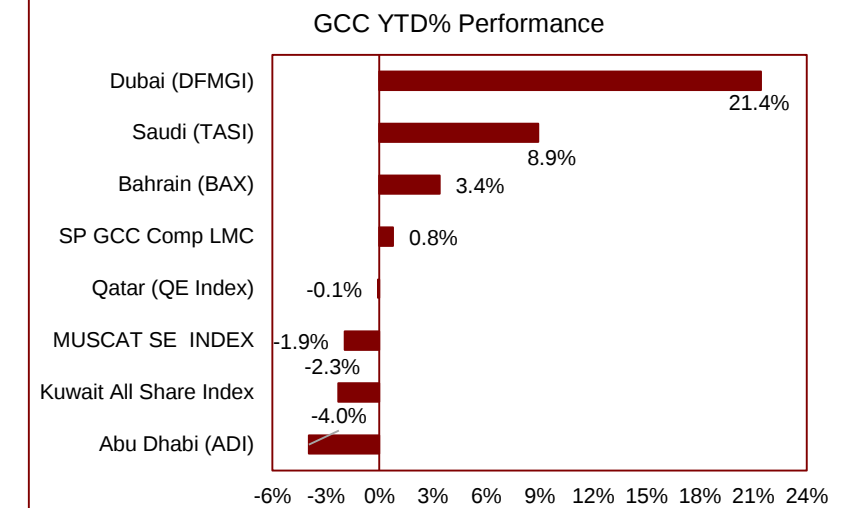
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.930	0.00	0.00	-3.33	-0.53	-9.42	7.37 KWD	1.79	27.00
KFH	0.757	-0.26	-1.05	-4.06	1.61	1.18	11.18 KWD	1.93	32.00
Zain	0.514	-0.39	-0.19	-1.34	-0.77	-8.70	2.22 KWD	1.73	10.96
BOUBYAN BANK	0.627	0.16	0.48	1.13	-2.03	-16.71	2.48 KWD	2.57	34.00
Agility	0.624	0.16	-1.11	-0.95	0.16	-13.33	1.67 KWD	0.88	22.49
Saudi Arabia									
ARAMCO	34.40	-0.58	1.18	6.17	6.67	17.88	8,323.25 SAR	5.44	16.84
SABIC	86.10	-0.69	-1.37	0.47	-2.38	-3.69	258.25 SAR	1.46	35.00
STC	40.80	-1.69	-1.45	-3.77	-6.21	11.48	203.96 SAR	2.69	16.68
AL-RAJHI BANK	72.60	0.00	0.83	-2.68	-0.55	-3.46	290.35 SAR	2.81	17.03
NCB	35.45	-1.25	-1.53	-8.04	-3.67	-5.94	212.66 SAR	1.24	11.36
United Arab Emirates									
ETISALAT.AD	20.88	-2.43	-5.52	-6.79	-6.79	-8.66	206.60 AED	5.10	21.10
FAB.AD	14.12	0.57	-1.26	-3.55	3.52	-17.43	155.98 AED	1.34	11.97
EMIRATES NBD	16.90	-0.59	3.68	-0.59	13.80	30.00	106.74 AED	1.08	5.49
DB ISLAMIC BK	5.68	0.00	-1.39	-1.22	3.84	-0.35	41.13 AED	0.98	7.56
EMAAR PROPERT	6.82	0.00	-0.44	0.89	6.40	16.38	60.28 AED	0.85	7.19
Qatar									
QNB	16.48	-0.12	-0.48	-2.94	6.87	-8.44	152.33 QAR	1.48	11.04
INDUSTRIES QAT	13.11	-1.80	-2.89	-1.65	16.74	2.34	79.38 QAR	2.12	14.50
QA ISLAMIC BK	20.16	-0.20	-0.44	-4.68	13.83	8.62	47.67 QAR	1.73	12.04
MASRAF AL RAYA	2.48	-0.52	-0.48	-1.16	-3.20	-21.76	23.09 QAR	0.96	22.25
MESAIEED PETRO	1.93	-0.52	0.05	-1.03	1.58	-9.26	24.27 QAR	1.46	18.45
OMAN									
BANK MUSCAT	0.282	0.36	0.71	0.71	2.17	2.55	2.12 OMR	0.95	8.33
OMANTEL	1.005	13.18	0.50	1.01	1.31	9.24	0.75 OMR	1.20	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	0.00	1.36	3.11	6.43	3.11	0.48 QAR	0.74	12.71
OMINVEST	0.378	-0.53	-0.53	-2.83	0.00	-10.00	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 -0.14 %The leading sector bottom performance indices today are Health care -2.15 % Energy -2.09 % Technology -1.85 % respectively.

KSA

Saudi Armco have negative performance today by -0.58 %, SABIC have negative performance today by -0.69%. STC have negative performance today by -1.69 %, Al Rajhi Bank flat performance today 0%

U.A.E

ETISALAT .AD have negative performance today by -2.43 %, FAB.AD has a positive performance today by + 0.57 %



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