



شركة الاستثمار الوطنية  
NATIONAL INVESTMENTS COMPANY

## GCC DAILY MORNING BRIEF

Wednesday, August 16<sup>th</sup> 2023



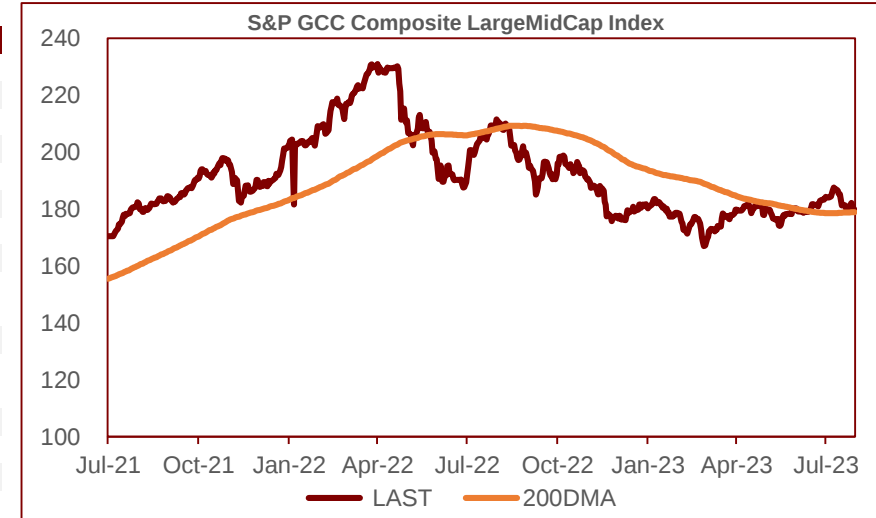


### Market Watch

Wednesday, August 16, 2023

| Description              | Close     | Day Δ | WTD   | MTD   | QTD   | YTD   | M Cap (in Bn) | PBV  | PE    |
|--------------------------|-----------|-------|-------|-------|-------|-------|---------------|------|-------|
| <b>GCC Markets</b>       |           |       |       |       |       |       |               |      |       |
| Saudi (TASI)             | 11,392.76 | -0.18 | -0.27 | -2.56 | -0.58 | 8.73  | 11,378 SAR    | 1.97 | 18.80 |
| Qatar (QE Index)         | 10,663.56 | -0.09 | -0.67 | -2.73 | 5.85  | -0.16 | 564 QAR       | 1.38 | 12.64 |
| Dubai (DFMGI)            | 4,045.64  | -0.14 | -0.08 | -0.34 | 6.69  | 21.27 | 581 AED       | 1.59 | 21.31 |
| Abu Dhabi (ADI)          | 9,780.79  | -0.27 | -1.25 | -0.06 | 2.41  | -4.21 | 1,435 AED     | 1.82 | 20.47 |
| Bahrain (BAX)            | 1,960.08  | 0.03  | -0.62 | -1.23 | 0.11  | 3.42  | 9 BHD         | 6.07 | 18.00 |
| MUSCAT SE INDEX          | 4,766.39  | 0.07  | 0.19  | -0.20 | -0.04 | -1.87 | 5 OMR         | 0.99 | 13.25 |
| SP GCC Comp LMC          | 179.67    | -0.27 | -0.63 | -3.11 | 0.36  | 0.50  |               |      |       |
| SP UAE PRICE INDEX       | 139.55    | -0.41 | -1.15 | -1.25 | 3.88  | 1.50  |               |      |       |
| <b>Developed Markets</b> |           |       |       |       |       |       |               |      |       |
| MSCI World Index         | 2,925.63  | -0.77 | -1.98 | -4.53 | -1.39 | 12.41 |               |      |       |
| U.S. (S&P 500)           | 4,404.33  | -0.76 | -1.44 | -4.02 | -1.03 | 14.71 |               |      |       |
| U.K. (FTSE 100)          | 7,356.88  | -0.44 | -3.44 | -4.45 | -2.32 | -1.27 |               |      |       |
| Japan (Topix)            | 2,260.84  | -1.29 | -1.85 | -2.66 | -1.21 | 19.51 |               |      |       |
| <b>Emerging Markets</b>  |           |       |       |       |       |       |               |      |       |
| MSCI EM Index            | 975.77    | -0.61 | -3.23 | -6.80 | -1.39 | 2.03  |               |      |       |
| China (SSE Composite)    | 3,150.13  | -0.82 | -3.21 | -4.28 | -1.62 | 1.97  |               |      |       |
| India (Sensex)           | 65,539.42 | 0.21  | -0.23 | -1.49 | 1.27  | 7.72  |               |      |       |

| Description            | Close    | Day Δ | WTD   | MTD   | QTD    | YTD    | M Cap (in Bn) | PBV  | PE    |
|------------------------|----------|-------|-------|-------|--------|--------|---------------|------|-------|
| <b>Kuwait</b>          |          |       |       |       |        |        |               |      |       |
| Kuwait All Share Index | 7,120.47 | -0.05 | -0.38 | -1.84 | 1.29   | -2.35  | 46.01 KWD     | 1.71 | 21.65 |
| Kuwait Premier Index   | 7,822.81 | -0.05 | -0.48 | -2.95 | 0.17   | -3.61  | 35.50 KWD     | 1.65 | 20.60 |
| Kuwait Main Index      | 5,781.17 | -0.03 | -0.01 | 2.68  | 5.81   | 3.29   | 10.51 KWD     | 1.89 | 25.21 |
| NIC 50                 | 9,294.93 | 1.96  | -0.49 | -2.96 | 0.16   | 2.32   | 28.60 KWD     | 1.63 | 19.60 |
| <b>Kuwait Sector</b>   |          |       |       |       |        |        |               |      |       |
| Banking                | 1,733.26 | -0.04 | -0.47 | -2.02 | 1.61   | -3.38  | 29.16 KWD     | 1.16 | 21.60 |
| Telecom                | 1,103.81 | 0.12  | 0.32  | -0.87 | -1.22  | -6.57  | 3.38 KWD      | 1.34 | 8.80  |
| Industrials            | 978.49   | -0.42 | -0.94 | -2.29 | -2.45  | -9.31  | 3.48 KWD      | 0.83 | 18.48 |
| Financial services     | 1,266.98 | 0.12  | -0.67 | -1.81 | 3.26   | 0.77   | 3.64 KWD      | 0.76 | 31.42 |
| Real estate            | 1,236.61 | -0.23 | 0.25  | -1.08 | 2.41   | 2.31   | 2.68 KWD      | 0.62 | 29.34 |
| Basic materials        | 857.14   | 0.35  | 0.75  | -2.94 | -5.54  | -0.92  | 0.76 KWD      | 1.99 | 9.69  |
| Health care            | 463.06   | -1.03 | 1.66  | 1.93  | 3.03   | 0.26   | 0.23 KWD      | 0.89 | 6.21  |
| Consumer services      | 609.01   | 1.72  | 7.76  | -2.03 | -0.99  | 26.89  | 0.78 KWD      | 0.91 | 13.49 |
| Insurance              | 2,225.24 | -0.31 | 1.28  | 2.12  | 5.46   | 43.49  | 0.91 KWD      | 0.90 | 12.10 |
| Consumer Disc          | 1,656.90 | -0.04 | -2.31 | -3.72 | 6.21   | 11.44  | 0.18 KWD      | 1.13 | 37.61 |
| Energy                 | 972.66   | 0.00  | -3.61 | -2.63 | -4.58  | -14.57 | 0.20 KWD      | 0.67 | 4.41  |
| Technology             | 578.36   | 0.00  | -2.93 | 0.25  | -14.42 | -16.93 | 0.01 KWD      | 0.72 | 0.00  |
| Utilities              | 510.53   | 0.52  | 0.00  | -3.96 | -3.00  | 3.19   | 0.21 KWD      | 1.94 | 15.81 |



### What Move the GCC markets

#### Oil Prices

Oil prices fell in early trade on Wednesday, extending losses to a fourth consecutive session on fears of slowing growth in China and possible further U.S. interest rate hikes weakening fuel demand in the world's two biggest economies. Brent crude futures fell to \$83.45 a barrel.

#### Kuwait Market

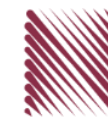
The market closed down by -0.05% at 7,120.47 value traded 31.8 million KD, Premier market value reached 22.9 million KD down -0.05% at 7,822.81

#### KSA Market

The market closed down today by -0.18% at 11,392.76

# DAILY MARKETS WRAP,

## NIC RESEARCH AND STUDIES DEP



| Description                 | Close | Day Δ | WTD   | MTD   | QTD   | YTD    | M Cap (in Bn) | PBV  | PE    |
|-----------------------------|-------|-------|-------|-------|-------|--------|---------------|------|-------|
| <b>Blue Chip Watch</b>      |       | %     | %     | %     | %     | %      |               |      |       |
| <b>Kuwait</b>               |       |       |       |       |       |        |               |      |       |
| NBK                         | 0.933 | 0.32  | 0.32  | -3.01 | -0.21 | -9.12  | 7.37 KWD      | 1.79 | 27.00 |
| KFH                         | 0.757 | 0.00  | -1.05 | -4.06 | 1.61  | 1.18   | 11.18 KWD     | 1.93 | 32.00 |
| Zain                        | 0.514 | 0.00  | -0.19 | -1.34 | -0.77 | -8.70  | 2.22 KWD      | 1.73 | 10.96 |
| BOUBYAN BANK                | 0.622 | -0.80 | -0.32 | 0.32  | -2.81 | -17.38 | 2.48 KWD      | 2.57 | 34.00 |
| Agility                     | 0.619 | -0.80 | -1.90 | -1.75 | -0.64 | -14.03 | 1.67 KWD      | 0.88 | 22.49 |
| <b>Saudi Arabia</b>         |       |       |       |       |       |        |               |      |       |
| ARAMCO                      | 34.45 | 0.15  | 1.32  | 6.33  | 6.82  | 18.05  | 8,323.25 SAR  | 5.44 | 16.84 |
| SABIC                       | 86.40 | 0.35  | -1.03 | 0.82  | -2.04 | -3.36  | 258.25 SAR    | 1.46 | 35.00 |
| STC                         | 40.55 | -0.61 | -2.05 | -4.36 | -6.78 | 10.79  | 203.96 SAR    | 2.69 | 16.68 |
| AL-RAJHI BANK               | 72.30 | -0.41 | 0.42  | -3.08 | -0.96 | -3.86  | 290.35 SAR    | 2.81 | 17.03 |
| NCB                         | 35.10 | -0.99 | -2.50 | -8.95 | -4.62 | -6.87  | 212.66 SAR    | 1.24 | 11.36 |
| <b>United Arab Emirates</b> |       |       |       |       |       |        |               |      |       |
| ETISALAT.AD                 | 21.10 | 1.05  | -4.52 | -5.80 | -5.80 | -7.70  | 206.60 AED    | 5.10 | 21.10 |
| FAB.AD                      | 13.90 | -1.56 | -2.80 | -5.05 | 1.91  | -18.71 | 155.98 AED    | 1.34 | 11.97 |
| EMIRATES NBD                | 16.80 | -0.59 | 3.07  | -1.18 | 13.13 | 29.23  | 106.74 AED    | 1.08 | 5.49  |
| DB ISLAMIC BK               | 5.63  | -0.88 | -2.26 | -2.09 | 2.93  | -1.23  | 41.13 AED     | 0.98 | 7.56  |
| EMAAR PROPERT               | 6.81  | -0.15 | -0.58 | 0.74  | 6.24  | 16.21  | 60.28 AED     | 0.85 | 7.19  |
| <b>Qatar</b>                |       |       |       |       |       |        |               |      |       |
| QNB                         | 16.40 | -0.49 | -0.97 | -3.42 | 6.36  | -8.89  | 151.44 QAR    | 1.47 | 10.99 |
| INDUSTRIES QAT              | 13.15 | 0.31  | -2.59 | -1.35 | 17.10 | 2.65   | 79.54 QAR     | 2.12 | 14.54 |
| QA ISLAMIC BK               | 20.11 | -0.25 | -0.69 | -4.92 | 13.55 | 8.35   | 47.51 QAR     | 1.73 | 12.01 |
| MASRAF AL RAYA              | 2.49  | 0.32  | -0.16 | -0.84 | -2.89 | -21.51 | 23.14 QAR     | 0.97 | 22.32 |
| MESAIEED PETRO              | 1.93  | -0.21 | -0.16 | -1.23 | 1.37  | -9.45  | 24.19 QAR     | 1.46 | 18.41 |
| <b>OMAN</b>                 |       |       |       |       |       |        |               |      |       |
| BANK MUSCAT                 | 0.282 | 0.00  | 0.71  | 0.71  | 2.17  | 2.55   | 2.12 OMR      | 0.95 | 8.33  |
| OMANTEL                     | 1.015 | 14.30 | 1.50  | 2.01  | 2.32  | 10.33  | 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                    | 0.380 | 0.53  | 0.00  | -2.31 | 0.53  | -9.52  | 0.25 QAR      | 0.71 | 6.85  |

### Foreign Holding

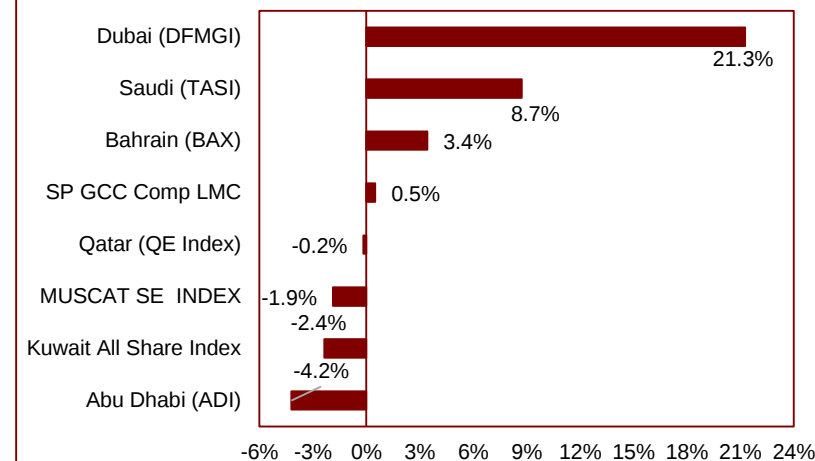
| Date         | NBK    | GBK    | CBK   | ABK   | MUTAHED | KIB   | BURG   | KFH    | BOUB  | WARBA |
|--------------|--------|--------|-------|-------|---------|-------|--------|--------|-------|-------|
| 9-August 23  | 24.42% | 15.0%  | 0.07% | 2.09% | 0.24%   | 5.07% | 17.57% | 13.68% | 6.14% | 4.54% |
| 16-August 23 | 24.40% | 15.02% | 0.07% | 2.19% | 0.24%   | 5.10% | 17.55% | 13.62% | 6.15% | 4.63% |

### End of Report

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### GCC YTD% Performance



### Leading Sector, Security Performance

#### Kuwait

The market is down today by -0.05 %The leading sector bottom performance indices today are Health care -1.03 % Industrials -0.42 % Insurance -0.31 % respectively.

#### KSA

Saudi Armco has a positive performance today by + 0.15 %, SABIC has a positive performance today by + 0.35%. STC has a negative performance today by -0.61 %, Al Rajhi Bank has a negative performance today by -0.41 %

#### U.A.E

ETISALAT .AD has a positive performance today by + 1.05 %, FAB.AD has a negative performance today by -1.56 %



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