



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, July 16th 2023





Market Watch

Sunday, July 16, 2023

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
GCC Markets									
Saudi (TASI)	11,715.50	0.07	0.07	2.24	2.24	11.81	10,978 SAR	2.10	19.21
Qatar (QE Index)	10,225.45	0.08	0.08	1.50	1.50	-4.27	543 QAR	1.39	11.38
Dubai (DFMGI)	4,009.83	0.13	0.13	5.74	5.74	20.20	579 AED	1.56	22.91
Abu Dhabi (ADI)	9,671.89	0.47	0.47	1.27	1.27	-5.28	1,435 AED	1.84	21.36
Bahrain (BAX)	1,979.48	0.25	0.25	1.10	1.10	4.44	9 BHD	7.29	18.00
MUSCAT SE INDEX	4,769.54	-0.57	-0.57	0.03	0.03	-1.81	5 OMR	1.01	13.25
SP GCC Comp LMC	183.20	0.10	0.10	2.34	2.34	2.48			
SP UAE PRICE INDEX	138.86	0.61	0.61	3.36	3.36	0.99			
Developed Markets									
MSCI World Index	3,017.94	-0.06	-0.06	1.73	1.73	15.95			
U.S. (S&P 500)	4,505.42	-0.10	-0.10	1.24	1.24	17.34			
U.K. (FTSE 100)	7,434.57	-0.08	-0.08	-1.29	-1.29	-0.23			
Japan (Topix)	2,239.10	-0.17	-0.17	-2.16	-2.16	18.36			
Emerging Markets									
MSCI EM Index	1,028.49	0.78	0.78	3.94	3.94	7.54			
China (SSE Composite)	3,237.70	0.04	0.04	1.11	1.11	4.81			
India (Sensex)	66,060.90	0.77	0.77	2.07	2.07	8.58			

Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Kuwait									
Kuwait All Share Index	7,307.04	-0.09	-0.09	3.94	3.94	0.20	47.04 KWD	1.79	18.79
Kuwait Premier Index	8,128.10	-0.16	-0.16	4.08	4.08	0.15	36.74 KWD	1.73	18.73
Kuwait Main Index	5,648.71	0.21	0.21	3.39	3.39	0.93	10.30 KWD	1.98	19.01
NIC 50	9,116.27	0.00	-0.17	4.07	4.07	0.36	28.60 KWD	1.71	17.73
Kuwait Sector									
Banking	1,778.85	-0.31	-0.31	4.28	4.28	-0.84	29.79 KWD	1.27	19.73
Telecom	1,155.25	0.60	0.60	3.39	3.39	-2.22	3.54 KWD	1.42	9.19
Industrials	1,034.24	-0.05	-0.05	3.11	3.11	-4.14	3.64 KWD	0.81	20.60
Financial services	1,288.61	0.42	0.42	5.02	5.02	2.50	3.72 KWD	0.80	19.68
Real estate	1,231.90	0.05	0.05	2.02	2.02	1.92	2.66 KWD	0.62	22.71
Basic materials	913.17	1.20	1.20	0.64	0.64	5.56	0.80 KWD	1.45	8.84
Health care	453.98	0.81	0.81	1.01	1.01	-1.70	0.22 KWD	0.94	6.61
Consumer services	616.45	0.44	0.44	0.22	0.22	28.44	0.83 KWD	0.85	14.17
Insurance	2,101.33	0.15	0.15	-0.41	-0.41	35.50	0.86 KWD	0.79	10.19
Consumer Disc	1,703.52	-0.81	-0.81	9.20	9.20	14.57	0.19 KWD	1.11	0.00
Energy	1,005.48	0.46	0.46	-1.36	-1.36	-11.69	0.21 KWD	0.77	4.57
Technology	616.19	3.17	3.17	-8.83	-8.83	-11.49	0.01 KWD	0.76	0.00
Utilities	534.21	0.49	0.49	1.50	1.50	7.98	0.22 KWD	2.04	16.63

S&P GCC Composite LargeMidCap Index



What Move the GCC markets

Oil Prices

Oil prices dipped for a second session on Monday after Libya resumed production over the weekend while China, the world's largest crude importer, is expected to release economic data showing that its post-pandemic recovery is fizzling out. Brent crude futures fell 57 cents, or 0.7%, to \$79.30 a barrel.

Kuwait Market

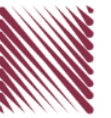
The market closed down by -0.09% at 7,307.04 value traded 48.4 million KD, Premier market value traded reached 35.3 million KD down -0.16% at 8,128.10

KSA Market

The market closed up today by 0.07% at 11,715.50

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



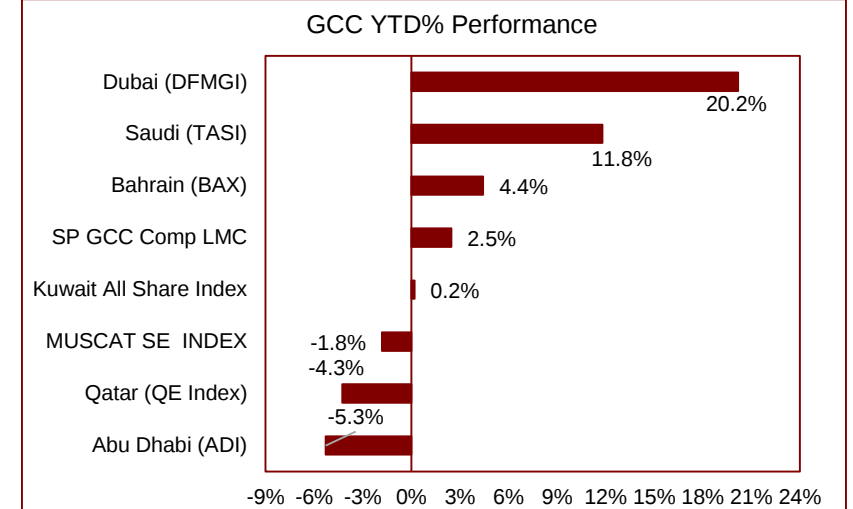
Description	Close	Day Δ	WTD	MTD	QTD	YTD	M Cap (in Bn)	PBV	PE
Blue Chip Watch		%	%	%	%	%			
Kuwait									
NBK	0.979	0.00	0.00	4.71	4.71	-4.64	7.76 KWD	1.97	27.00
KFH	0.776	-0.64	-0.64	4.16	4.16	3.72	11.45 KWD	1.98	32.00
Zain	0.534	0.19	0.19	3.09	3.09	-5.15	2.31 KWD	1.80	11.38
BOUBYAN BANK	0.654	-0.15	-0.15	2.19	2.19	-13.13	2.59 KWD	2.92	34.00
Agility	0.656	-0.30	-0.30	5.30	5.30	-8.89	1.75 KWD	0.92	23.65
Saudi Arabia									
ARAMCO	32.15	0.00	0.00	-0.31	-0.31	10.17	7,780.09 SAR	5.21	13.84
SABIC	88.20	-0.23	-0.23	0.00	0.00	-1.34	264.59 SAR	1.42	35.00
STC	44.95	-0.11	-0.11	3.33	3.33	22.81	224.74 SAR	3.00	18.35
AL-RAJHI BANK	71.20	-0.84	-0.84	-2.47	-2.47	-5.32	284.79 SAR	2.87	16.73
NCB	37.95	0.66	0.66	3.13	3.13	0.69	227.69 SAR	1.32	12.17
United Arab Emirates									
ETISALAT.AD	22.26	1.83	1.83	-0.62	-0.62	-2.62	206.60 AED	5.10	21.10
FAB.AD	13.84	0.87	0.87	1.47	1.47	-19.06	152.90 AED	1.36	13.03
EMIRATES NBD	16.30	0.62	0.62	9.76	9.76	25.38	102.96 AED	1.08	6.16
DB ISLAMIC BK	5.67	0.35	0.35	3.66	3.66	-0.53	41.06 AED	1.02	7.88
EMAAR PROPERT	6.85	-0.44	-0.44	6.86	6.86	16.89	60.55 AED	0.85	7.22
Qatar									
QNB	15.61	-0.19	-0.19	1.23	1.23	-13.28	144.25 QAR	1.40	10.46
INDUSTRIES QAT	11.90	-0.17	-0.17	5.97	5.97	-7.10	72.03 QAR	1.97	9.89
QA ISLAMIC BK	17.82	0.06	0.06	0.62	0.62	-3.99	42.13 QAR	1.58	10.89
MASRAF AL RAYA	2.51	0.04	0.04	-2.07	-2.07	-20.85	23.35 QAR	0.99	19.83
MESAIEED PETRO	1.91	-0.16	-0.16	0.68	0.68	-10.06	24.04 QAR	1.47	15.09
OMAN									
BANK MUSCAT	0.280	0.36	0.36	1.45	1.45	1.82	2.10 OMR	0.97	8.33
OMANTEL	0.986	11.04	-0.70	-0.60	-0.60	7.17	0.74 OMR	1.21	7.69
BANK DHOFAR	0.175	0.00	0.00	1.16	1.16	0.00	0.52 QAR	0.74	14.93
NAT BANK OF OMAN	0.290	0.00	0.00	3.57	3.57	0.35	0.47 QAR	0.73	12.71
OMINVEST	0.380	0.00	0.00	0.53	0.53	-9.52	0.25 QAR	0.71	6.85

Foreign Holding										
Date	NBK	GBK	CBK	ABK	MUTAHED	KIB	BURG	KFH	BOUB	WARBA
05-July 23	24.3%	15.55%	0.066%	1.72%	0.24%	5.22%	17.6%	13.9%	6.23%	4.48%
12-July 23	24.34%	15.45%	0.066%	1.72%	0.24%	5.23%	17.58%	13.82%	6.21%	4.57%

End of Report

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Sources, Boursa Kuwait , Refinitiv , NIC



Leading Sector, Security Performance

Kuwait

The market is down today by -0.09 %The leading sector bottom performance indices today are Consumer Disc -0.81 % Banking -0.31 % Industrials -0.05 % respectively.

KSA

Saudi Armco flat performance today 0 %, SABIC have negative performance today by -0.23 %. STC have negative performance today by -0.11 %, Al Rajhi Bank have negative performance today by -0.84 %

U.A.E

ETISALAT .AD has a positive performance today by + 1.83 %, FAB.AD has a positive performance today by + 0.87 %



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